OR Chapter CUPA-HR
Spring 2013 Conference

“Navigating the Seas of Change”

Oregon State University
April 5, 2013
Happy Spring and welcome from the OR Chapter CUPA-HR Board!

Spring time is a busy time in Higher Education, spring semesters/terms are underway and many of our students are anxiously awaiting graduation. Spring is also a busy time for our OR Chapter board as we prepare and finalize the details for today’s conference.

As a chapter, one of our strategic goals is to enhance professional development opportunities for you, our members. With that in mind we have lined up outstanding keynote presentation, breakout sessions and an afternoon featured presentation.

Please contact anyone on the Chapter Board if you need any information or have any questions. We are happy to assist you! You may also contact us at orcupahr@gmail.com, we would love to hear from you.

We want to take this opportunity to thank Marylhurst University and Oregon State University for hosting our conferences. Special thanks to Robin Boles and Liz Newcombe for their hard work along with the staff of their institutions that made our fall and spring conferences a success. Thanks for your hospitality!

**Save the date** to join us at Reed College for our Fall Conference on November 15, 2013! We ask that you take a few minutes at the end today’s conference and complete the conference evaluation. We value your feedback! We welcome your suggestions for topics, speakers and ideas.

On a personal note, I would like to thank our amazing board members for their hard work, commitment, creativity and countless hours of they dedicate to our chapter and our conferences. Glenna Davis, Kacy Keippela, Steve Johnson, and Katie Lahey thank you for making this year the best one yet for OR Chapter! You are an amazing team!

We hope that you enjoy today’s conference and have the opportunity to network with many of our HR members. We look forward to seeing you again this fall!

Best wishes,

Linda Flamenco  
President, OR Chapter CUPA-HR  
[http://chapters.cupahr.org/or/](http://chapters.cupahr.org/or/)
## Morning Program

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<td>8:30 – 9:00</td>
<td>Registration</td>
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<td>9:00 – 9:15</td>
<td>Welcome</td>
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<td>9:15 – 9:30</td>
<td>Announcements</td>
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<td>9:30 – 10:45</td>
<td>Morning Keynote</td>
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### HR’s Role within Title IX - Paula Barron, Barran Liebman

Title IX is certainly best known for the impact it has on students – from sports to the classroom. But its broad mandate reaches any education program or activity receiving federal financial assistance – and that implicates hiring, advancement, program funding, and concerns about possible retaliations of whistleblowers as well as the complicated interrelationship between the management of employees and the protection of students. Participants can expect an overview of the employment side of the law, and a series of take-aways for practical steps to ensure compliance with the requirements of the statute.

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<tr>
<td>10:45 – 11:00</td>
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<td>11:00 – 12:00</td>
<td>Morning Breakout Sessions</td>
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### A: You Can Lead a Horse to Water... Insights into Facilitating Organizational Change Efforts - Paul Biwan, Associate Director for Learning & Organizational Development for Oregon State University Office of Human Resources

Organizational change will continue to be the norm as institutions reorganize, restructure and reposition themselves. In this interactive session, several models will be illustrated to provide a context for addressing the human side of change. Whether the transition effort is embraced or being met with resistance, models provide a framework to help people see how they can more effectively work with employees to produce the desired outcome. In illustrating the models, information on various research findings will be incorporated into the discussion.

### B: Oregon’s Exchange Overview – Health Insurance Options for your Uninsured Employees - Jim Walton, Director of New Sales for Regence Blue Cross Blue Shield of Oregon

When a problem arises and there isn’t time to research the law, decisions still must be made. It is essential to understand the fundamentals from which new developments are emerging. Join Jim as he presents on the on the latest developments in health care reform, specifically the Patient Protection and Affordable Care Act. You will learn what health insurance resources will be available through the Exchange to your employees, including those part-timers and adjunct faculty who are ineligible for your benefit plans. This includes insurance plans and the tax subsidies to help pay for them. You will benefit from this seminar regardless of your current level of expertise.

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<td>12:00 – 1:15</td>
<td>Lunch and Networking</td>
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1:15 – 2:15  Afternoon Breakout Sessions

A: Changing your Benefit Design without Creating Chaos - **David Blake, PhD, SPHR, Assistant VP of Human Resources for Oregon State University**
This presentation is based on one university's story of how they took an unsustainable health and welfare plan and with a strong collaboration between the university and their broker redesigned their entire plan. The presentation discusses ways in which the university used data analysis, benchmarking, and a strong commitment to transparency to seek university buy-in. The presentation concludes with lessons learned and key take-aways.

B: Employer Shared Responsibility/ACA Compliance - **Linda Johnson, SPHR, Benefits Consultant for Segal and Mike Norman, Senior Vice President and Partner at Sibson Consulting**
This session will examine the current status and update on important pending Health Care Reform issues. Discover the changing landscape of notice and reporting requirements. Discover how the employer shared responsibility penalty can impact you and what you can do to minimize your exposure. This presentation will provide you’re the information and tools to strategically prepare to meet ACA compliance requirements.

C: The Changing Retirement Horizon – Why Retirement Education is Essential to You and Your Employees - **Bob Black, Financial Advisor for VALIC Financial Advisors**
This presentation will focus on the risks of retirement and how to manage those risks. Retirement risks to employees have multiple affects and being aware of these risks will provide an employee with information and resources to be prepared. Some of these risks this presentation will be focusing on are investment strategies for retirement, a retiring employee’s Essential Needs income planning, coordinating PERS and other benefits with income sources, how Social Security and Medicare fit in and income and distribution planning.

2:15 – 2:30  Afternoon Break & Chapter Celebration

2:30 – 3:45  Afternoon Featured Presentation

What’s New for 2013 – Legislative & Regulatory Developments / Latest Trends in Employment Litigation - **Randy Sutton, Saalfeld Griggs PC**
The Oregon legislature is now in session and there are a number of bills of concern that are working their way through the legislative process. Oregon employers should be prepared for a variety of new laws this year. At the federal level, Congress, regulatory agencies, and the courts continue to keep employers guessing. Randall Sutton, the Chair of the Employment Law & Litigation Practice Group at the Saalfeld Griggs PC business law firm in Salem, will update us on the latest developments and issues of concern to Oregon employers. For example, employee privacy and regulating postings to social media is a big issue this year. Randall will also discuss litigation trends, the particular issues that are most problematic for Oregon employers, and provide practical ideas for improving an employer’s chances of success.

3:45 – 4:15  Business Meeting – Elections, Wrap-up, Prizes, and Networking Opportunities

*We hope you enjoyed today’s conference! Thank you for attending, see you in the fall!*
Paula Barran, Barran Liebman *(HR’s Role in Title IX)*

Paula Barran, a founding partner at Barran Liebman, has been practicing labor and employment law since 1980. She has written extensively on management law and is a national speaker and trainer. In addition to providing regular employer advice, Paula handles employment litigation in state and federal courts, and labor disputes and employment arbitrations, and she develops and presents “train the trainer” programs to introduce comprehensive but cost effective training programs into workplaces. Since the first publication of the Oregon Super Lawyers magazine in 2006, Paula has repeatedly been named as a “Top Ten Lawyer” in Oregon. In 2008, and 2010, she was honored as the “Top Point Getter” for the year. Paula is ranked #1 (with partners Ed Harnden and Rick Liebman) for Labor and Employment Law defense in the State of Oregon by Chambers & Partners USA, America’s Leading Business Lawyers, 2003-present. She is also a fellow of The College of Labor and Employment Lawyers, a fellow of the American Bar Foundation, and has been named in The Best Lawyers In America directory since 1995. She is admitted to practice in Oregon; Washington and before the U.S. Supreme Court, U.S. Court of Appeals, Ninth Circuit; U.S. District Court, District of Oregon and U.S. District Court, Eastern and Western Districts of Washington.

Paula received her B.A. from the College of William and Mary, M.A. from Cornell University, Ph.D. from the University of British Columbia, J.D., with honors, from Osgoode Hall Law School at York University, and M.B.A. degree from the University of Oregon, Oregon Executive MBA program. Paula has also earned an ATIXA Title IX Coordinator and Administrator Certificate and works with colleges and universities on their Title IX compliance.

Paul Biwan, Associate Director for Learning & Organizational Development, Oregon State University *(You Can Lead a Horse to Water…)*

Paul Biwan has worked in higher education for more than 25 years. A significant amount of this time has been focused in the areas of organizational systems, group dynamics, change implementation, facilitation, one-on-one performance consultation, workplace intervention, and coaching. Biwan has a degree in psychology and a master’s degree in public administration. His passion for organizational and personal effectiveness combined with the complexities of the higher education environment led him to pursue work at the University of Washington, Carthage College in Wisconsin, Arizona State University, and finally to Oregon State University.

Helping organizations and people realize their potential is a personal commitment for Biwan. He combines his extensive knowledge of tried and true models with current organizational trends, and a deep understanding of systems, operations and human behavior to design and develop effective programs. Because of Biwan's expertise and skill, his workshops, one-to-one consultations, group facilitations, and individual performance coaching are not the typical "packaged" programs. His ability to address free-flowing dialogue and inquiry allows individuals and groups to reach their own meaningful conclusions.

Biwan has designed and developed training, consultation and facilitation programs at the request of Deans, directors and department heads, campus groups and departments, campus administration units, managers & supervisors, and academic, professional and classified employees.

Bob Black, VALIC Financial Advisors *(The Changing Retirement Horizon)*

After working 21 years at Welch Allyn, Bob Black came to Valic Financial Advisors in 2005. His BS in Engineering, MBA, and his many years in finance and business development has served him well as he assists Oregonians making wise financial decisions for the future. In 2007, Bob began presenting the Financial Planning seminar in association with Oregon PERS.

David Blake, AVP of HR, Oregon State University *(Changing your Benefit Design without Creating Chaos)*

David Blake, PhD, SPHR is currently the Assistant Vice President of Human Resources for Oregon State University. In that capacity, he is responsible for all human resources services delivered to the university serving 26,000 students and 10,000 employees. He has held senior HR positions for the University of San Diego, National University, Abbott Laboratories and Guidant Corporation. He is a retired member of the United States Air Force.

Dr. Blake has over 30 years’ experience in the human resources field holding positions in the private, public, and governmental sectors. Additionally, he serves as an adjunct faculty member for several universities where he teaches advanced level courses related to human capital management as well as leadership. He has written and published a wide variety of articles about workforce engagement, benefits, and learning and development. Dr. Blake has led several successful human resource projects designed to increase employee satisfaction ranging from ERP implementations (SAP and Oracle) to increase employee access; creation of HR shared services model, compensation and classification programs, benefit plan redesign that moved from treating illness to creating healthy lifestyles, and the implementation of flexible work arrangements that recognize the changing needs of workers.
David Blake, AVP of HR, OSU (Changing your Benefit Design without Creating Chaos) - Continued

Dr. Blake is a strong advocate for community and professional service. He has served as Board Member for the San Diego Workforce Partnership and is currently a member of the Linn-Benton, Oregon Workforce Partnership focusing on issues of workforce strategy and development. He is currently a board member for Benton, Oregon, Habitat for Humanity. He is past president of the Southern California President of College and University Professional Association for Human Resources (CUPA-HR) and is currently a Board Member, CUPA-HR Western Region. Dr. Blake holds a Bachelor’s degree in Vocational Education, Southern Illinois University, a Master’s degree in Management, University of Redlands, and a Doctorate in Organization in Management-ER Emphasis, Capella University. His research interests are directed towards understanding and adapting HR programs to meet generational needs. He is a long-term holder of the Senior Professional in Human Resources certification.

Linda Johnson, Benefits Consultant, Segal (Employer Shared Responsibility / ACA Compliance)

Ms. Johnson graduated with an MS in HR Management and Organizational Development from Chapman University and with a BS in Business Administration from Lewis-Clark State College. She is a member of the College and University Professional Association for Human Resources (CUPA-HR), the International Foundation for Employee Benefit Plans (IFEBP), WorldatWork, and is a past chapter president of the Society for Human Resources Management (SHRM). Ms. Johnson is a Licensed Health, Life and Disability Consultant and a certified Senior Professional in Human Resources (SPHR). Her work has received CUPA-HR’s Excellence in Human Resource Practice Award and a Silver Quill Communications Award.

Michael Norman, Senior Vice President, Portland, Sibson Consulting (Employer Shared Responsibility / ACA Compliance)

Mr. Norman is a Senior Vice President and Partner at Sibson Consulting. He has over 25 years of experience helping clients optimize their performance and rewards. He is a recognized expert in job design, job structures, organization design, and change implementation. His current focus is in designing human resource management systems to support changes in corporate and HE institution direction and strategy deployment. He serves a wide array of clients across several domestic and international industries, including higher education, technology, insurance, professional services, energy, and government agencies.

Mr. Norman has developed a broad set of organization design tools and change management methodologies that have helped his clients accelerate adoption of new programs and processes. His penchant to deliver practical solutions that yield sustainable value has earned him senior level trusted advisor roles in both higher education and corporate client settings.

He is a frequent speaker at professional organizations such as the Conference Board, World at Work, and the Human Capital Institute. He also attends Northwest and National CUPA meetings. Mr. Norman’s most recent Higher Education clients include Oregon State and Arizona State Universities.

Randy Sutton, SAALFELD GRIGGS PC
(What’s New for 2013 – Legislative & Regulatory Developments)

Randy is a shareholder with the SAALFELD GRIGGS PC business law firm in Salem, Oregon. Randy advises management with regard to difficult employee relations issues. He also assists employers in complying with state and federal employment laws and defends employers against claims by current and former employees. Randy represents employers before administrative agencies and in state and federal court. He has handled a wide variety of harassment, discrimination and retaliation cases alleging violations of age, sex, disability, race, family leave, national origin, and other laws. He also defends employers against wage & hour, breach of contract and other employment-related claims. In addition to defending employers, Randy has successfully prosecuted claims by employers against competitors and former employees for misappropriation of trade secrets and violation of noncompetition and nonsolicitation agreements.

A frequent public speaker on employment legal issues, Randy began his career as a personnel analyst for the City of San Diego. He now leads the firm’s employment law and litigation practice group. The firm focuses its practice on providing businesses with innovative and practical legal solutions. Randy is admitted to practice law in both Oregon and Washington and assists clients across Oregon.

Randy has served for many years as the Oregon Legislative Director for the Society for Human Resource Management (“SHRM”), and was the 2012 Director of the Oregon State Council. He also serves on the Associated Oregon Industries Employment Practices Steering Committee and is the Past President of the Job Growers tri-county workforce investment board.

Bill Walton, Director of New Sales, Regence Blue Cross Blue Shield of Oregon (Oregon’s Exchange Overview – sponsored by USI)

Jim Walton has 20 years of Employee Benefit experience in Oregon. For the past 5 years he has served in a sales management role for Regence BlueCross BlueShield of Oregon. Jim is Regence’s point person for working with the Oregon Exchange. He has spent the past couple years developing an understanding of the legislative and creation of the Exchange, so that Regence is ready to participate. Prior to joining Regence, Jim was Employee Benefits Manager for TOC Management Services, now called Vigilant. He managed and administrated Vigilant’s two large non-union health insurance trusts covering wood products and manufacturing companies located in Oregon and Washington. Jim has had leadership roles with the Rogue Valley Life Underwriters, served as past co-chairman of Governor’s Taskforce on Prescription Drugs, past chairman of Oregon Coalition of Health Care Purchasers, and a current board member of Make-a-Wish Oregon.
We would like to sincerely THANK and recognize our Annual Partners and Sponsors for their support!

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SAVE THE DATE

OR Chapter CUPA-HR Fall Conference 2013
Reed College
November 15, 2013
Conference Notes: