

12/6/2023 - 12/8/2023
 The Royal Palms Resort
 5200 East Camelback Rd
 Phoenix AZ, 85018



Educational Symposium

AGENDA

Cutting Edge Trends in Executive Compensation: How to Attract & Retain Top Talent

Day 1: Wednesday, December 6, 2023 (all times are in MST)

Arrival at The Royal Palms Resort - Hotel Check in is 4pm

6:00 - 7:00pm

Welcome Reception

Location: Palmera Patio

7:00 - 9:00pm

Dinner

Location: Palmera Salon

Day 2: Thursday, December 7, 2023

7:00 - 8:15am

Breakfast

Location: Vernadero Lawn

8:30 - 9:00am
Livestream

Introduction of Attendees, Jim Hebets and Jamie Hebets, The Hebets Company

Location: Estrella East

9:00 - 10:30am
Livestream

Brian Lee, CSP, HoF, Custom Learning Solutions

Reignite a 5 Star Patient Experience, Fully Staffed

Create a Culture of Healing Kindness & Find and Retain Quality Staff

10:30 - 10:45am

Break

Location: Estrella Patio

10:45am - 11:30am
Livestream

Allison Kaylor-Flink, NFP Retirement Services

Qualified Retirement Plans 401(k)/403(b)

Establishing a Secure Foundation that You Can Build Upon with Confidence

Jordan Cook, NFP Corporate Benefits

Group Health & Welfare Benefits

Managing the Balancing Act Between Business Pressures and Employee Expectations

11:30am - 12:00pm
Livestream

Mark Robledo, President & Founder, The Crossroads Group, Inc.

FQHC Employee Engagement & Patient Experience

Data-Driven Executive Insights from Aggregated Data Analysis from a National Survey Vendor

12:00pm - 12:15pm
Livestream

Melinda Figeley, SPHR, Principal, The Hebets Company

Employee Engagement & Satisfaction Data

How to Actionize the Data to Produce Tangible Improvements

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Day 2: Thursday, December 7, 2023 (continued)

12:15 - 1:00pm

Lunch

Location: Vernadero Lawn

1:00 - 1:15pm
 Livestream

Introduction of Staff

Jim Hebets and Jamie Hebets, The Hebets Company

Location: Estrella East

1:15 - 2:15pm
 Livestream

Jamie Hebets, SVP, The Hebets Company

Non-Profit Executive Benefits 101

- *Crash Course on All Available Plan Types, Designs & What is Considered "In Market"*
 - What types of benefits are traditionally provided at the C-Suite Level?
 - What would be deemed "in-market" from an employer contribution standpoint?
- *Cost Recovery with Interest: How to recover 100% of employer retirement contributions, at a later date, with interest*
- *How to convert taxable cash pay to something that can be accessed either during your working years or later in retirement, completely tax-free.*
 - Executive Retention Program Case Studies
 - CEO Retirement / Succession Planning
 - C-Suite / Provider Retention

2:15pm - 2:45pm
 Livestream

Melinda Figeley, SPHR, Principal, The Hebets Company

Succession Planning: Four Pillars of an Effective Plan

- *How does Succession Planning differ from Replacement Management?*
- *What are the steps in the Succession Planning Process?*
- *Once we've evaluated employees and developed our bench, is our Succession Plan complete?*

2:45 - 3:00pm

Break

Location: Estrella Patio

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The Hebets Company
The Value of Voice™

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Day 2: Thursday, December 7, 2023 (continued)

3:00-3:30pm
 Livestream

Jim Hebets, President, The Hebets Company

C-Suite Retention, Retirement & Succession Planning

- 457(f)/SERP vs Loan Regime Split Dollar
 - Learn how to have a retirement benefit sit on the books of your organization as an interest accruing asset, rather than an expense or liability
 - How to efficiently "Catch-Up" your leadership for missed retirement contributions with a fully cost recovered tax-free retirement benefit
 - How your organization can recover 100% of every dollar funded to provide this retirement benefit, with interest

3:30 - 4:30pm
 Livestream

Jim Sinkoff, CFO & Deputy CFO, Sun River

Anne Kauffman Nolon MPH, CEO, Sun River

Panel Moderated by Jim Hebets, President, The Hebets Company

The Journey to Becoming a Destination Employer: How to attract and retain top talent through strategic benefit planning

- You Will Learn How Sun River Health:
 - Developed a holistic compensation and benefits philosophy, while being mindful of cashflow
 - Uses two creative alternative retirement benefits to help attract, retain, and reward key executives, physicians, and staff
 - The process that they went through to create a well-developed executive succession plan, while respecting the loyalty of a founding CEO
 - Established their organization as a Destination Employer, while managing cashflow along with rapid growth
 - The single most critical issue that must be addressed to allow an organization to become a Destination Employer

4:30 - 5:00pm
 Livestream

Jim Hebets, President, The Hebets Company

Conclusion and Q&A

6:15pm

Transportation to DINNER

Depart at 6:15pm at the Pillow Benches at The Royal Palms Resort

6:30pm

Cocktails and Refreshments

Marcellino Ristorante - 7114 E. Stetson Drive Scottsdale, AZ 85251

9:00pm

Transportation back to Hotel

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Day 3: Friday, December 8, 2023

7:00 - 8:15am

Breakfast

Location: Estrella Garden

8:30 - 8:45am
Livestream

Introduction of Day's Agenda, Jim Hebets and Jamie Hebets, The Hebets Company

Location: Estrella East

8:45 - 9:15am
Livestream

Melinda Figeley, SPHR, Principal, The Hebets Company

Attracting and Retaining Key Talent: Your Competitive Advantage

- *Current Employment Situation*
- *Opportunity is Knocking*
- *Why Compensation & Total Rewards Benchmarking is Critical*

9:15 - 10:15am
Livestream

Paula Tomko, CEO, Central Virginia Health Services, Inc.

Charles Albaugh, CFO, Central Virginia Health Services, Inc.

Moderated by Jim & Jamie Hebets, President & Senior VP, The Hebets Company

The Differentiation Factor & the Story Behind It

- *How CVHS has Established Themselves as a Destination Employer*
- *Compensation Philosophy*
- *Pivotal moments & lessons learned throughout the last 20+ years*
- *How & Why CVHS has revamped their entire retirement program and is now providing ALL employer contributions to either LRSD or a 162(b) Bonus Plan for ALL employees*

10:15 - 10:30am

Introduction to Breakout / Roundtable Sessions

Jim & Jamie Hebets, President & Senior VP, The Hebets Company

10:30 - 11:00am

Breakout / Roundtable Session (food provided during 10:30 - 12:00pm)

11:00 - 11:30am

Breakout / Roundtable Session

11:30 - 12:00pm

Breakout / Roundtable Session

12:00pm

Conclusion of Event / Departures (One-on-one Meetings Available in Afternoon Upon Request - Contact Sharon Parrish for more information)