

2023 Fall Symposium and Annual Meeting

State of the Healthcare Industry

Monona Terrace | Tuesday, October 24, 2023 | 9:30am - 4:15pm CT



- 9:30am - 10:00am CT** **Registration**
- 10:00am - 10:30am CT** **The Alliance Annual Meeting**
- Cheryl DeMars, President & CEO - The Alliance
 - Diana Clark, Benefits Manager - Promega, Board Chair - The Alliance
 - Doug Benzine, Vice President of Finance & Operations - The Alliance
- 10:40am - 11:25am CT** **Breakout Sessions:**
- Self-Funding: Getting Started - *Hall F***
- Mike Roche, Director of Business Development - The Alliance
- Beyond the Basics: Take Your Health Benefits to the Next Level - *Ballroom***
- Led by Melina Kambitsi, Ph.D., Senior Vice President, Business Development and Strategic Marketing - The Alliance
 - Sara Hames, Principal - NBS Advisors, LLC
 - Drew Leatherberry, President, Principal Advisor - Avergent
 - Taylor Orton, Vice President, Employee Benefits - Cottingham & Butler
- The Legislative Agenda: Health Policy Issues Impacting Employers - *Hall E***
- Led by Rachel Ver Velde, Senior Director of Workforce, Education and Employment Policy - Wisconsin Manufacturers & Commerce (WMC)
 - Phillip Blair, Director of Human Resources - Gamber-Johnson, LLC
 - Will Walker, President and CEO - Walker Forge, Inc.
 - Libby Weber, CEO - The Weber Group
- 11:30am - 12:00pm CT** **Networking Mixer on the Grand Terrace**
- 12:00pm - 1:00pm CT** **Networking Lunch on the Grand Terrace**
- 1:15pm - 1:25pm CT** **Welcome & Opening Remarks**
- Cheryl DeMars, President & CEO - The Alliance
- 1:25pm - 1:55pm CT** **Healthcare Transformation Awards Ceremony**
- 1:55pm - 2:15pm CT** **Networking Coffee Break**
- Meet & Greet with HTA Recipients and Sponsors
- 2:15pm - 3:45pm CT** **State of the Healthcare Industry**
- Ford Koles, Vice President and National Spokesperson - Advisory Board
- 3:45pm - 4:15pm CT** **Closing Comments & Adjourn**

Speaker Biographies



Presenter

Cheryl De Mars, President and CEO

The Alliance

Cheryl De Mars joined The Alliance in 1992 and became CEO in 2006. Cheryl works with the Board of Directors and senior leadership to establish the strategic direction of the cooperative. She participates in a number of national and regional initiatives that align with The Alliance's mission of controlling costs, improving quality, and engaging individuals in their health. She serves as board chair of the Wisconsin Health Information Organization (WHIO) and is a board member for Wisconsin Collaborative for Healthcare Quality.



Presenter

Doug Benzine, Vice President of Finance and Operations

The Alliance

Doug Benzine joined The Alliance in 2022 as VP of Finance and Operations where he oversees the claims and customer service, finance, MIS, and HR departments, as well as business planning and reporting. Doug has over 30 years' experience in business finance and organizational operations, including VP of Operations at WPS Health Solutions, where he led the expansion of the fastest-growing, most profitable division while managing the largest federal Veteran Affairs health claims administration contract in the nation.



Presenter

Diana Clark, Benefits Manager, Promega Corporation

Board Chair, The Alliance

Diana Clark has been the benefits manager at Promega Corporation since 2016. In this role, she designs and manages all health and welfare, leave of absence and retirement programs, including compliance activities. Diana previously held Senior Professional in Human Resources (SPHR) and Professional in Human Resources (PHR) certifications. She previously held positions at QBE, Mayo Clinic Health System, Franciscan Healthcare, Festival Foods, and CUNA Mutual Group. Diana joined The Alliance Board of Directors in 2017. She has served as board chair since 2021.



Presenter

Mike Roche, Director of Business Development

The Alliance

Mike Roche joined The Alliance in 2015. He is responsible for working with prospective employers, their broker/consultant and their TPA to introduce them to self-funded health benefit strategies; sharing data-based insights to manage their healthcare spend; and serving as a voice of The Alliance to expand our membership.

Mike has a strong background in health benefits and self-funding. He previously served as a regional sales advisor for Digital Benefits Advisors where he managed the health benefits for more than 160 credit union clients across 14 states.

Speaker Biographies



Moderator

Melina Kambitsi, Ph.D., Sr Vice President, Business Development & Strategic Marketing

The Alliance

Dr. Melina Kambitsi joined The Alliance in 2017 and leads the teams responsible for membership growth and retention. Dr. Kambitsi comes to The Alliance from Network Health in Milwaukee and Menasha, Wisconsin where she was chief sales and strategy officer. In this role, she was responsible for sales and underwriting, strategic planning, product development and risk-based contract analytics. Dr. Kambitsi currently serves on National CooperativeRx's Board of Directors.



Panelist

Sara Hames, Principal

NBS Advisors, LLC

Sara Hames, a principal with NBS Advisors, LLC, brings over 30 years of experience in employee benefits consulting. She has dedicated her practice to helping interested employers disrupt and transform traditional healthcare into sustainable delivery models.

Sara is a member of the International Society for Certified Employee Benefit Specialists (ISCEBS) and has been a featured speaker at many conferences. In addition, she has taught employee benefits classes at the University of Wisconsin-Green Bay, Marquette University, and the International Foundation of Employee Benefit Plans.



Panelist

Drew Leatherberry, President, Principal Advisor

Avergent

Drew Leatherberry is Founder and President of Avergent, a Wisconsin-based benefits advisement firm serving employers since 2019. Over the past 15 years, Drew has started and led agencies with innovative approaches to managing healthcare costs. As a certified Health Rosetta Associate Advisor, he leverages proven best practices from across the country to make healthcare affordable for plan members. He's been recognized regionally and nationally as a voice for transformation in the healthcare benefits arena.



Panelist

Taylor Orton, Vice President, Employee Benefits

Cottingham & Butler

Taylor Orton has worked with Cottingham & Butler since 2012, and currently holds the position as the Vice President of Employee Benefits. Prior to managing a team of Consultants throughout the Midwest, Taylor ran the Healthcare Analytics division of Cottingham & Butler and brought with him an analytical background with experience at Crescent Electric and IBM. Taylor's vast experience in both healthcare and data analytics provides employers with a strategic insight to make better decisions for their business and employees.

Speaker Biographies



Keynote

Ford Koles, Vice President and National Spokesperson

Advisory Board

Ford Koles is one of Advisory Board's preeminent thought leaders in the area of health system economics and strategy and is the keynote speaker at the annual meetings for Advisory Board's strategy membership. Ford is a healthcare economist by training and has participated in every major Advisory Board research initiative since 1992. He is well-versed in health care history and the many reform initiatives we have lived through in the past three decades: coverage expansion; vertical integration and physician partnership models; managed care and payer contracting; horizontal integration and system economies of scale; and quality-based payment.

Prior to joining Advisory Board, he was a management consultant for the Hay Group and Ernst & Young.



Moderator

Rachel Ver Velde, Senior Director of Workforce, Education and Employment Policy

Wisconsin Manufacturers & Commerce, WMC

Rachel Ver Velde is Senior Director of Workforce, Education and Employment Policy at Wisconsin Manufacturers & Commerce (WMC). Prior to WMC, she served as Chief of Staff for Congressman Glenn Grothman (Wisconsin's 6th District), managing his office operations in both Washington, D.C., and Wisconsin. Additionally, she served as Grothman's Chief of Staff while he was the Assistant Majority Leader in the Wisconsin State Senate. Prior to that, Rachel worked for Congressman Paul Ryan in his Janesville office.

Rachel graduated with Honors from the University of Wisconsin - Whitewater with a B.A. in Political Science and Economics.



Panelist

Phillip Blair, Director of Human Resources

Gamber-Johnson, LLC

Phillip Blair is the Director of Human Resources for Gamber-Johnson LLC, a global manufacturing company headquartered in Stevens Point, Wisconsin. Throughout his career Phillip has been responsible for managing and implementing employee centered benefits strategies aimed at enhancing value while also controlling costs.

Speaker Biographies



Panelist

Will Walker, President and CEO

Walker Forge, Inc.

Will Walker is the President and CEO of Walker Forge, Inc., a technological leader in the manufacture of custom engineered steel forgings for the energy, transportation, ag, rail, military, and construction markets. The company is a past recipient of the WI Manufacturer of the Year Award (large company division).

Prior to joining Walker Forge, Will was an attorney with Foley and Lardner in Milwaukee. He has served as a Director of a number of public and private companies, including ARC Group Worldwide, Inc., Provident Mutual Funds, Inc., and Clinkenbeard Inc. In addition, he has been a member of numerous advisory boards throughout Wisconsin.



Panelist

Libby Weber, CEO

The Weber Group

Libby Weber, CEO of The Weber Group, leads a holding and management company with 450 employees based in La Crosse, WI. The Weber Group promotes healthy living across multiple industries, including healthcare, hospitality, and real estate development. In addition to this role, she is also President of Idea Fund of La Crosse, a regional venture capital firm investing in early-stage companies.

Healthcare Transformation Awards



Presenter

Brad Olm, Vice President of Shared Services

Gordon Flesch Company, Inc.

Olm joined Gordon Flesch Company as vice president of human resources in 2010. He previously served in human resource leadership positions at Edgerton Hospital and Health Services, CUNA Mutual Group, Allstate Insurance Company and Avon Products. Olm is a certified Senior Professional in Human Resources (SPHR). He also served as an active duty commissioned officer in the United States Air Force. Olm has served on The Alliance Board of Directors since 2013 and served as board chair in 2015 and 2016.



Presenter

Dan Ludwig, Director of Benefits and Safety

Brakebush Brothers, Inc.

Ludwig joined Brakebush Brothers in 2004, transitioning into controlling health plan expenses in 2014 as the company ventured from fully insured to self-insured. Ludwig developed Brakebush's Centers of Excellence program which includes steerage and an international pharmacy. In 2018, Brakebush was awarded The Alliance Healthcare Transformation Award. Ludwig was presented with the Employer/Purchaser Excellence Award (National Alliance of Healthcare Purchaser Coalitions) in 2019. Each year since becoming self-insured, Brakebush has maintained annual per member costs lower than their first year.



Recipient

Cynthia Fisher, Founder and Chairman

PatientRightsAdvocate.org

Cynthia Fisher is the founder of PatientRightsAdvocate.org, a nonprofit organization seeking healthcare price transparency, giving power to American consumers and employers to lower their costs of care and coverage through a functional marketplace. She is a life sciences entrepreneur, independent investor, and corporate board director of The Boston Beer Company (SAM) and Easterly Government Properties, Inc. (DEA). Cynthia is best known for her pioneering work as Founder and CEO of ViaCord, Inc., a leading, price transparent umbilical cord blood stem cell banking service which she started in 1993.



Recipient

Drew Leatherberry, President, Principal Advisor

Avergent

Drew Leatherberry founded Avergent, a Wisconsin-based benefits advisement firm, in 2019 to help his clients save money while delivering better benefits. Since creating Avergent, Drew has helped dozens of employers reduce premiums and expenses year-over-year while still offering low or even \$0 deductibles. Using data analytics, he designs health benefits plans that can reduce employers' healthcare spending by 20% or more while achieving better health outcomes. As a certified Health Rosetta Associate Advisor, he leverages proven best practices from across the country to make healthcare affordable for plan members.