

Understanding Negotiated Employee Benefits

July 15-16, 2025

Brookfield (Milwaukee), Wisconsin

www.ifebp.org/NegotiatedEmployeeBenefits



RETIREMENT INCOME



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BENEFITS

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Negotiating employee benefits is an important function that has a significant impact on all stakeholders. For **employees** who are plan participants, their health and retirement security are on the line.

For **employers**, investing in their labor force to recruit and retain workers has serious financial implications. It is imperative that those who negotiate employee benefits understand their role, be familiar with the collective bargaining process, and have some knowledge of benefits and the plans that are a direct result of their collective efforts.

This course will help you understand both the employee benefits industry and the collective bargaining process so you can engage strategically as you bargain in good faith, yielding productive outcomes for your stakeholders.



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Who Should Attend

This course is designed not for those whose primary job is in the administration or oversight of employee benefits, but for those who have a related and important need to understand collectively bargained benefits, including those who work as:

- Union bargaining committee members
- Employer or management negotiators
- Human resource leaders
- Labor union leaders and staff
- Management association executives and staff
- Union negotiators
- Union representatives
- Union stewards
- Union trainers
- Union or management attorneys involved in negotiations
- Labor relations attorneys.

Key Takeaways

- Learn about the legal environment surrounding benefits and collective bargaining.
- Understand the value of benefits to stakeholders.
- Learn the fundamentals of health and retirement benefits.
- Identify ideas and strategies that work from your peers and industry experts.
- Receive valuable written resource materials.

SESSIONS AT A GLANCE

Lunch will be provided.

TUESDAY July 15, 2025	
8:00-10:00 a.m.	The History of Bargaining for Benefits
10:15 a.m.-12:00 noon	The Legal Environment of Employee Benefits
12:45-1:45 p.m.	The Value of Negotiated Benefits
2:00-3:00 p.m.	Plan Types
3:00-4:30 p.m.	The Collective Bargaining Process
WEDNESDAY July 16, 2025	
8:00-10:00 a.m.	Introduction to Retirement Plans
10:15 a.m.-12:15 p.m.	Introduction to Health Plans
1:00-3:00 p.m.	Wrap-Up

(All times are listed in Central Time.)

Register Today!

www.ifebp.org/NegotiatedEmployeeBenefits

Training Facility and Hotel

July 15-16, 2025

**Brookfield (Milwaukee),
Wisconsin**

All training sessions are held at the International Foundation Training Center in Brookfield, Wisconsin, just west of downtown Milwaukee. Hotel accommodations are provided by Embassy Suites by Hilton Milwaukee Brookfield, located four miles from the training center. A complimentary shuttle is provided for transportation between the hotel and training center.



Hotel Information

Embassy Suites by Hilton Milwaukee Brookfield

1200 South Moorland Road, Brookfield, Wisconsin 53005

Reservation Deadline: June 21, 2025

Rate: US\$139 standard king suite single/double occupancy

Hotel Accommodations: Please visit our Hotel/Travel tab at www.ifebp.org/NegotiatedBenefitsHotel to book your hotel reservations online.

Hotel Cancellation Policy: Cancellations within 48 hours of the scheduled arrival date will incur a cancellation fee equal to the entire stay of the reservation booked. Hotel deposit is forfeited for cancellations/transfers received within three days (eight days for Disney properties) of arrival.

For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or edreg@ifebp.org.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

Brookfield is just 20 minutes from downtown Milwaukee! This suburban paradise offers options for fine dining, casual eateries and everything in between. Satisfy your shopping needs at the Corners of Brookfield, Brookfield Square Mall, local boutiques and major retailers. And you can experience the best of Milwaukee within a short drive! See something new at the Harley-Davidson Museum, American Family Field, Milwaukee County Zoo or one of many live performance venues. Plus, you can quench your thirst at a selection of local breweries and distilleries.

PROGRAM SCHEDULE

(All times are listed in Central Time.)

TUESDAY | July 15, 2025

8:00-10:00 a.m.

The History of Bargaining for Benefits

Learn about the history of benefits and the role that collective bargaining played in the growth of employee benefits in the United States.

10:15 a.m.-12:00 noon

The Legal Environment of Employee Benefits

Understand the legal framework that employee benefit plans exist in and how that impacts collective bargaining.

12:00 noon-12:45 p.m.

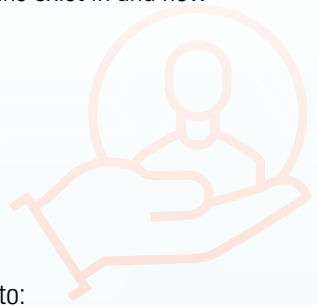
Lunch

12:45-1:45 p.m.

The Value of Negotiated Benefits

Review the unique aspects of benefit plans as they relate to:

- Making the business case for participation
- Value proposition for stakeholders
- How benefits impact recruitment and retention.



TUESDAY | July 15, 2025 *(continued)*

2:00-3:00 p.m.

Plan Types

Understand the characteristics and differences between:

- Single employer plans
- Multiemployer plans
- Public sector plans.

3:00-4:30 p.m.

The Collective Bargaining Process

Learn about the collective bargaining process and how to execute it for a successful outcome.

- Collective bargaining structures
- Who are the players?
- Managing a bargaining committee
- Prep work
- Logistics
- Writing and memorializing proposals

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Understanding Negotiated Employee Benefits

WEDNESDAY | July 16, 2025

8:00-10:00 a.m.

Introduction to Retirement Plans

Explore retirement plan topics, including:

- Plan types: Defined benefit and defined contribution plans
- Plan designs and features
- Hot topics: Retirement income, fraud and abuse
- Retirement legislative update: SECURE 2.0 Act, cybersecurity.

10:15 a.m.-12:15 p.m.

Introduction to Health Plans

Explore health plans and health benefits topics, including:

- Plan types, managed care, funding, plan design
- Plan designs and features
- Overview of Rx plans
- The range of ancillary coverages: Dental, vision, life, etc.
- Hot topics: Mental health, Rx, wellness, fraud and abuse
- Health care legal and legislative update: No Surprises, *Dobbs*, cybersecurity.

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WEDNESDAY | July 16, 2025 *(continued)*

12:15-1:00 p.m.

Lunch

1:00-3:00 p.m.

Wrap-Up

Hone your skills as you learn:

- Best practices for bargaining benefits
- Unique issues when bargaining health and retirement benefits
- Other negotiated employee benefits
- How to create a bargaining history
- How to cost out benefit proposals
- Case studies
- Best practices
- Open discussion/Q&A.



Looking for more benefits information?

Here are five tools and resources to get you started:



1. **Toolkits**—Find expertly curated resources on topics impacting the benefits industry, including DEI, mental health, financial education and retirement security, benefits communication and more.

www.ifebp.org/toolkits



2. **Trustee Resource Center**—Trustees can receive guidance on legal and regulatory issues, investment management, financial reporting, retirement plans (including defined benefit plans) and health plans.

www.ifebp.org/trusteeresource



3. **E-Learning Courses**—Get back to basics with e-learning courses that cover health care, retirement and benefit compliance. Popular courses include Fundamentals in Health Benefits, Fundamentals in Retirement Plans, ERISA Compliance, Absence Management and Multiemployer Plan Auditing.

www.ifebp.org/elearning



4. **Word on Benefits® Blog**—The International Foundation's blog takes complex benefits issues and trending topics and turns them into bite-sized content.

www.ifebp.org/blog



5. **Benefits Knowledge Center**—Members can locate Foundation magazine articles, court cases, survey reports and sample documents as well as collaborate with an information specialist for unlimited assistance with benefits questions.

www.ifebp.org/benefitsknowledgecenter

REGISTRATION

Go to www.ifebp.org/NegotiatedEmployeeBenefits to register.

CONFERENCE REGISTRATION FEES

Save \$300 if you register before June 3, 2025.

Through June 3, 2025	Member: US\$1,460 Nonmember: US\$1,680
After June 3, 2025	Member: US\$1,760 Nonmember: US\$1,980

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.



Educational sessions at this program can qualify for CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.

INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.



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Sessions Include

- The History of Bargaining for Benefits
- The Legal Environment of Employee Benefits
- The Value of Negotiated Benefits
- Introduction to Health Plans
- Introduction to Retirement Plans
- The Collective Bargaining Process

**Register by June 3, 2025
to Save US\$300!**

Visit www.ifebp.org/NegotiatedEmployeeBenefits
to register, or call (833) 886-3749
for more information.



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