

Employment History

AIG, Portland, OR

Director, Claims Liaison & Industry Relations

January 2016-December 2016

Director, Product Management, Disability & FML/Absence Management

February 2015 -January 2016

- Lead strategic development of Absence Management, and LOA/ADA products & services for employer & affinity markets
- Develop thought leadership capabilities to deepen AIG expertise in employee productivity & Absence Management
- Lead product development and management for Leave Management, STD and EAP
- Attend and present at industry conferences
- Alert colleagues, brokers, consulting firms on fast changing absence/LOA/ADA regulatory environment
- Develop capabilities around absence/disability related productivity management concepts for brokers, consulting firms, prospects & clients.
- Develop customer service models including Integrated Absence Management
- Develop employer consulting practice to provide absence/disability/LOA/ADA advice to employers in aid of strengthening existing relationships and building new ones

STANDARD INSURANCE COMPANY, Portland, OR

Practice Consultant – Absence Management

January 2014 - January 2015

- Lead strategic planning and program evolution
- Inform Absence Management strategy to all levels of Company
- Manage internal and external marketing of evolving practice
- Conduct research and analysis to quantify business opportunities
- Identify new and existing sales channels while supporting sales staff to acquire and retain customers
- Act as liaison to external customers consulting to full range of their absence/disability and productivity issues
- Act as central media and industry contact for Absence Management, Health and Productivity

National Practice Leader – Workplace Possibilities

March 2011- December 2014

- Corporate thought leader on health, absence, disability and productivity issues
- Member of Strategic Partner Consulting Team which increased sales revenue 20% above goal
- Develop sales strategies for selling short term disability and absence management leveraged by Workplace Possibilities
- Consult to clients and prospects on integrating health, disability, leaves of absence, non-insured plans, e.g., sick leave.
- Represent The Standard to brokers and consultants at national and local levels
- Develop metrics and benchmarking for consulting with clients on absence & disability
- Promote The Standard's Workplace Possibilities and health & productivity capabilities by:
 - Designing and delivering training courses to sales staff, brokers and consultants
 - Building integration of health, absence, disability components
 - Delivering webinars to human resources audiences
 - Speaking at conferences
 - Media interviews
 - Authoring articles
 - Authoring white papers
 - Conducting broker and consultant educational presentations

MERCER HUMAN RESOURCE CONSULTING, Portland, OR

National Absence Management Leader - Total Health Management Practice

Sept. 2007 - March 2011

- Member of senior leadership team which provided direction to consulting staff across USA in how to help employers reduce the cost and impact of poor health, absence and disability

- Led rebuilding of Absence Management Practice. Re-staffed the organization and supervised 6 consultants.
- Increased sales revenues from \$3.9M to \$5.1M in first year
- Over both tours of service at Mercer:
 - Conducted 62 audits
 - Evaluated 50 employer absence/disability programs
 - Designed 36 absence/disability programs for employers, associations, unions
 - Led 20 vendor selection marketing searches for employers/plan sponsors
- Rebuilt internal relationships with stakeholders across the company.
- Developed practice specific tools, e.g., intranet site, brochures
- Created and led external marketing campaign, which included speaking at national and regional conferences, conducting webinars
- Negotiated Mercer's first sponsorship, and personally represented the firm, at Disability Management Employer Coalition
- Designed, conducted and published *Kronos/Mercer Survey Report on the Total Financial Impact of Employee Absences, 2010*
- Designed and conducted *Mercer Absence Management Survey, 2010*

STANDARD INSURANCE COMPANY, Portland, OR

Assistant Vice President – Managed Disability Programs and Services

May 2005 - Sept. 2007

- Member of Senior Management Team and personally responsible for management of department of 75 staff including 36 Nurse Case Managers, 21 Vocational Case Managers, 2 Mental Health Case Managers, 3 Directors, training staff, administrative staff as well as supporting 26 consulting physicians
- Developed strategic plan with claims and marketing to position the company as a leader in return to work (RTW) and raise its visibility
- Managed \$10,000,000 budget
- Designed and implemented new model for Social Security Disability Insurance Advocacy aimed at reducing overpayments and speedier securing of benefits from the government
- Implemented new medical case management procedures including:
 - Improvement of independent medical evaluation processes
 - Improvement in use of medical records
 - Development of new service model for physician consultants
 - Increased responsiveness of nurse case managers in adjudication
- Participated in, or led, finalist presentations to acquire new business
- Developed (RTW) consulting services for new and existing customers
- Designed and implemented industry-leading RTW program for Standard's block of business
- Created and implemented mental health unit's RTW program, first of its kind in North America, for claimants with behavioral health disabilities
- Formulated departmental, and RTW metrics to gauge performance and success
- Led creation of quality assurance vision and strategic plan to lead industry in QA
- Responsible for Standard Benefits University and shaped best in class claims training based upon hi-tech industry models
- Served as company spokesperson, presenting at 21 conferences during 2005-07
- Conducted 50 broker/consultant continuing education presentations across USA

MERCER HUMAN RESOURCE CONSULTING, Canada/USA

Senior Consultant, Disability and Absence Management

April 1993 - May 2005

- Built western Canada absence & disability management practice
- Led and facilitated multi-stakeholder development and implementation of numerous disability management programs for employers, insurers, unions and associations in both the public and private sectors
- Marketed and sold disability and absence consulting services across North America for Mercer consulting teams
- Evaluated and facilitated changes for how insurers use medical resources, vocational/RTW services and internal training programs
- Created and managed diverse and often concurrent project and program budgets
- Created auto insurance injury management program with accompanying development of region-wide medical resources, along with selection and credentialing criteria
- Led Canadian team of 5 in sales by personally generating revenue of \$1M out of team's total \$1.6M in 2001.

- Developed cost control strategies and techniques for disability programs
- Helped clients save significant costs in their disability plans
- Consulted to employers, unions, associations and other plan sponsors on disability, absence and cost savings issues.
- Consulted to 12 disability and three auto insurance carriers and helped them improve:
 - Adjudication practices
 - Medical services
 - Vocational rehabilitation/RTW programs
 - Early intervention programs
 - Management of permanent long term claims
 - Management of behavioral health claims
 - Selection and management of third party providers/sub-contractors
- Spoke at numerous national and regional conferences on disability management related topics
- Nationally recognized as expert on disability management, RTW as well as management of psychiatric disability claims

MANITOBA DEPARTMENT OF FAMILY SERVICES, Winnipeg, MB

Employment Development Specialist (Vocational Rehabilitation)

February 1985 - April 1993

Initiated and developed Canada's first vocational rehabilitation and employment program for psychiatrically disabled adults

- Developed and implemented funding structures for disability programs
- Designed and implemented new vocational rehabilitation techniques.
- Supervised four staff
- Created metrics to gauge success
- Evaluated Provincial vocational rehabilitation program
- Initiated and directed two-year long project to redefine vocational rehabilitation program and policies
- Wrote policies regarding Province's new Vocational Rehabilitation of Disabled Persons Agreement with Canada.
- Negotiated funding on behalf of private non-profit agencies
- Consulted to private non-profit boards of directors
- Conducted strategic planning with numerous organizations

Additional Work History with Non-Profit Organizations Prior to 1985

- Director or Employment Development: Association for Community Living
- Planning and Development Officer: MacDonald Youth Services
- Project Manager: Training Resources for Youth

Education

Wayne State University (BA)

Detroit, MI

- 4-year program with major in English literature with minors in chemistry and philosophy

University of San Francisco

Winnipeg, MB

- Certified as Employment Training Specialist

American Council on Exercise

Portland, OR

- Certified as Group Fitness Instructor