

Understanding Negotiated Employee Benefits

July 14-15, 2026

Brookfield (Milwaukee), Wisconsin

www.ifebp.org/NegotiatedEmployeeBenefits

Better
Understanding,
Better Outcomes



RETIREMENT INCOME



RETIREMENT PLAN



LEGAL



RETENTION



NEGOTIATION



BENEFITS



RECRUITMENT



RX



HEALTH PLAN

Hello,

If you negotiate employee benefits as part of your role, you might be interested in a new course called *Understanding Negotiated Employee Benefits*. The course was created with the understanding that those who negotiate employee benefits have a huge responsibility and need to be familiar with the benefits and plans that are a direct result of their negotiating efforts. For plan participants, health and retirement security are on the line each time these negotiations take place.

Don't miss this chance to focus your learning on:

- The legal environment surrounding benefits and collective bargaining
- The value of benefits to stakeholders
- The fundamentals of health and retirement benefits
- Ideas and strategies that are working for your peers and industry experts.

As we all know, benefits are complex, and having a better understanding of the industry and the collective bargaining process will help yield positive outcomes for all stakeholders.

Thank you,



Tom DeRoche
Director, Educational Programs
International Foundation of Employee Benefit Plans



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Understanding Negotiated Employee Benefits

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.

Still Time to Register!

Get the best benefits for your stakeholders.

www.ifebp.org/NegotiatedEmployeeBenefits

Understanding Negotiated Employee Benefits

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 14, 2026	
8:00-10:00 a.m.	Overview of Bargaining for Benefits
10:15 a.m.-12:00 noon	The Legal Environment of Employee Benefits
12:45-1:45 p.m.	The Legal Environment Continued
2:00-4:30 p.m.	The Collective Bargaining Process
WEDNESDAY July 15, 2026	
8:00-9:45 a.m.	Introduction to Retirement Plans
10:00 a.m.-12:00 noon	Introduction to Health Plans
12:45-3:00 p.m.	Wrap-Up

(All times are listed in Central Time.)



PROGRAM SCHEDULE

(All times are listed in Central Time.)

TUESDAY | July 14, 2026

8:00-10:00 a.m.

Overview of Bargaining for Benefits

Learn some of the historical highlights and milestones that contributed to the role that collective bargaining played in the growth of employee benefits in the United States. This introductory session will also feature a discussion on the value of negotiated benefits.

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 Legal Environment Continued

2:00-4:30 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

WEDNESDAY | July 15, 2026

8:00-9:45 a.m.

Introduction to Retirement Plans

Explore retirement plan topics, including:

- Plan types—Defined benefit and defined contribution plans
- Plan designs and features
- Unique issues when bargaining retirement benefits.

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

Introduction to Health Plans

Explore health plans and health benefits topics, including:

- Plan types, managed care, funding, plan design
- Plan designs and features
- Ancillary coverages: Rx, dental, vision, life, etc.
- Unique issues when bargaining health benefits.

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

Lunch

12:45-3:00 p.m.

Wrap-Up

Hone your skills as you learn:

- Bargaining at the table—interactive scenarios
- Best practices for bargaining benefits
- How to cost out benefit proposals
- Case studies
- Best practices
- Open discussion/Q&A.

Register Today!

www.ifebp.org/NegotiatedEmployeeBenefits

Course Instructors



Mark Belland, Esq.
Shareholder
O'Brien, Belland & Bushinsky, LLC



John A. Nesse, Esq.
Managing Partner
Management Guidance, LLP



Joseph Ohm, MBA
Fund Administrator
Plumbers' and Technical Engineers' Local 130
Benefit Funds



Douglas Swanson, EdD, ACUE
Associate Extension Faculty in Labor and
Workforce Development, Labor Studies
Certificate Coordinator
University of Missouri—St. Louis

Hotel Information

DoubleTree by Hilton Milwaukee-Brookfield

Reservation Deadline:

Monday, June 22, 2026

Rates: US\$119 single/double occupancy

Hotel Accommodations:

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

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

Hotel Cancellation Policy: A fee of one (1) night room rate plus tax will be charged for reservations canceled within 24 prior to arrival.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates. Hotel reservations are confirmed on a first-come-first-served basis. Best available rate/hotel will be assigned if necessary.*



Hotel Details

All training sessions are held at the International Foundation Training Center in Brookfield, Wisconsin, just west of downtown Milwaukee. Hotel accommodations are provided by DoubleTree by Hilton Milwaukee-Brookfield, located less than one mile from the training center. A complimentary shuttle is provided for transportation between the hotel and training center.

Location Details

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.

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 presidential administration and employee benefits, 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

Member: US\$1,795 | Nonmember: US\$2,015

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of 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 Today!

To register, visit

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



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