Dear Colleague:

Welcome to our 16th annual SHRM Foundation Thought Leaders Retreat, *The Changing Nature of Work and the Worker*. Since the first small gathering in 1999, this retreat has grown to become a premier event where senior executives, academics and other thought leaders share candid discussion and insights on critical business issues and future trends.

Our 2014 theme is part of a strategic thought leadership initiative launched last year. The SHRM Foundation partnered with the Economist Intelligence Unit (EIU) and began a multiphase program to identify and analyze critical trends likely to affect the workplace in the next 5-10 years. After conducting a rigorous process of surveys, peer panels, research and analysis, we’ve identified three critical areas of focus:

1. Evolution of Work and the Worker.
2. Engaging and Integrating a Global Workforce.
3. Use of Talent Analytics for Competitive Advantage.

This retreat will explore the first theme. Our goal is to inform “what’s next,” drive evidence-based research and identify solutions for the resulting HR challenges. The SHRM Foundation’s vision is to be the globally recognized catalyst for shaping human resource thought leadership and research. Through this important initiative, we look forward to making that vision a reality. To learn more, please visit our digital hub at futurehrtrends.eiu.com.

The globalization of business and changing demographics are affecting the composition of your workforce, and new technologies are transforming the way work gets done. Over the next two days, we will examine the implications of these changes for your organization and for HR.

The presenters will explore questions such as: Where is the world of work headed? How do you best leverage the workforce of the future? What are the new ways to organize work, and how are they affecting business? You will hear from researchers and thought leaders studying these issues, executives and entrepreneurs organizing work in new ways, and HR leaders developing practical solutions for their organizations.

We encourage you to change tables often throughout the program to meet new people and expand your network. Ask questions and participate actively in the sessions. This is your opportunity to take a break from the office, share insights with your peers and learn from one another.

Thank you for joining us today. Enjoy the program!

James R. Schultz
Chair, SHRM Foundation Board

Richard Klimoski, Ph.D.
Chair, Thought Leadership Committee
Day One
9.29.2014
Monday

11:30 a.m.-12:30 p.m.  Lunch

12:15-12:30 p.m.  Welcome and Opening Remarks
Tom Darrow, SPHR, Principal, Talent Connections, LLC and Career Spa, LLC
Hank Jackson, President & CEO, SHRM

12:30-1:30 p.m.  Workforce 2024: Transforming Your Mindset for the Evolution of Work
Tammy Erickson, Founder and CEO, Tammy Erickson Associates

1:30-1:45 p.m.  Break

1:45-3:00 p.m.  Engaging a Changing Workforce Through Evidence-Based Practice and HR Analytics
Joseph Cabral, CHRO, Cleveland Clinic
Mark Schmit, Ph.D., SPHR, Executive Director, SHRM Foundation

3:00-3:15 p.m.  Break

3:15-4:45 p.m.  The Nature of the Future: Dispatches from the Socialstructed World
Marina Gorbis, Executive Director, Institute for the Future

4:45-5:30 p.m.  Break

5:30-7:00 p.m.  Reception

7:00-7:45 p.m.  Dinner

7:45-8:45 p.m.  Fostering a Culture of Respect and Inclusion
Philip Lenowitz, Senior Advisor to the HR Director, National Institutes of Health

The 2014 Thought Leaders Retreat has been approved for 7.75 hours of business recertification credit by the HR Certification Institute.
The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute’s criteria to be pre-approved for recertification credit.
Day Two
9.30.2014
Tuesday

7:00-8:00 a.m.  Breakfast
7:45-8:00 a.m.  Welcome and Announcements
8:00-9:00 a.m.  Innovation for the Changing Nature of Work: How 3M Is Preparing for the Workplace of Tomorrow
Jan Shimanski, VP, Global Talent Solutions, 3M
9:00-9:15 a.m.  Break
9:15-10:15 a.m.  Developing High-Potential Female Talent: Challenges and Opportunities
Nancy Carter, Ph.D., SVP, Research, Catalyst, Inc.
10:15-10:30 a.m.  Break
10:30-11:45 a.m.  Crowdsourcing: Transforming the Way Work Gets Done
Matt Crampton, Co-Founder and CTO, Gigwalk
Heidi Spirgi, SVP, Strategy Services Practice, Appirio
Gary Swart, Venture Partner, Polaris Partners
Moderator: Jason Averbook, Chief Business Innovation Officer, Appirio
11:45 a.m.-Noon  Closing Remarks

Thought Leadership Initiative Supporters

We would like to thank the following individuals for their support of the SHRM Foundation Thought Leadership Initiative:

- Tom Darrow, SPHR, Talent Connections LLC and Career Spa LLC
- Richard Klimoski, Ph.D.
- Karen B. Paul, Ph.D.
- Sara Rynes-Weller, Ph.D.
- Mark J. Schmit, Ph.D., SPHR
- James Schultz
- Jose Tomas, SPHR

To find out how you or your organization can support this important work, please contact Foundation Development Director Ashlee Smith at Ashlee.smith@shrm.org.
ABOUT THE PRESENTERS

Jason Averbook is chief business innovation officer of Appirio, where he leads the human capital management business. Appirio is a global consultancy that has strategic partnerships with cloud pioneers like salesforce.com, Google, Workday and Cornerstone OnDemand. Drawing on more than 20 years of experience in the HR and technology industry, Jason works closely with customers to creatively drive business outcomes. Jason was formerly the CEO and co-founder of Knowledge Infusion, which was acquired by Appirio in 2012. While at Knowledge Infusion, Jason was responsible for the vision and strategy that propelled the company to be the recognized leader in HR consulting. Prior to Knowledge Infusion, Jason held senior management positions at PeopleSoft and Ceridian, where he built strong relationships with customers and strove to provide unrivaled service to HR organizations around the world. Jason is deeply involved in the global HR community and speaks frequently at industry conferences, including HR Technology, U.S. News & World Report consistently names Cleveland Clinic as one of the nation’s best hospitals in its annual “America’s Best Hospitals” survey, and it was ranked #1 in cardiac care for 20 years in a row now. More than 3,000 full-time salaried physicians and researchers and 11,000 nurses represent 120 medical specialties and subspecialties at the Cleveland Clinic. Prior to this new role, Mr. Cabral was the SVP and CHRO for the North Shore-LIJ Health System. North Shore-LIJ, along with PepsiCo and Procter & Gamble, was awarded the 2013 Human Resource Management Impact Award, the first international award to honor organizations with outstanding evidence-based HR management practices. The organization has an annual operating budget of more than $7 billion and a workforce comprising more than 48,000 employees, making it one of the largest health care systems in the country. Mr. Cabral has more than 19 years of experience developing and executing strategies to enhance cultural and organizational change and has held key HR leadership roles at New York Presbyterian Hospital and Children’s Hospital in Boston, Mass. He has been cited by Time Magazine, Business Week, The Wall Street Journal, New York Times, Forbes and other industry publications for his expertise in best practices in human resources. He accepted, on behalf of North Shore-LIJ Health System, the Taleo Customer Innovation Award for creating a strategic, efficient talent management process that has helped the organization achieve its operational financial goals. He holds an M.S. in quality systems management.

Nancy M. Carter, Ph.D., leads Catalyst in developing groundbreaking research on issues related to women’s advancement in business and the professions. Prior to joining Catalyst, she was Leverhulme Visiting Professor at the London Business School and held the Richard M. Schulze Chair in Entrepreneurship at the University of St. Thomas in St. Paul, Minn. She has worked professionally in advertising and marketing research and works closely with government and private-sector initiatives promoting women’s advancement. She has published and speaks widely on gender and organizations, strategy, and entrepreneurship. Her book, Clearing the Hurdles, documents women’s challenges in accessing resources for building their businesses. In 2007, she was honored with the prestigious Global Award for Entrepreneurship.
Research for her work on the Diana Project, a research initiative on women entrepreneurs and the venture capital industry. Her research on women and minority entrepreneurs has been funded by the National Science Foundation, the U.S. Small Business Administration, the National Business Women’s Council, the Ewing Marion Kauffman Foundation, and Entrepreneurship and Small Business Research Institute. In 2009, Dr. Carter was appointed Visiting Scholar at INSEAD, a graduate business school with campuses in France, Singapore and Abu Dhabi. Dr. Carter received her Ph.D. in business administration from the University of Nebraska, an M.A. in mass communications from California State University, and a B.A. in journalism from the University of Nebraska.

“On a scale of 1 to 5, Millennials value stability and job security as a 2.6. Other generations valued it at 4.6.”

Source: Deloitte Millennials Innovation Survey

Matt Crampton is the co-founder and CTO of Gigwalk. He originally founded Gigwalk to create a marketplace to help businesses mobilize people to get work done. Since launching in May 2011, Gigwalk has grown into a local visibility software platform that facilitates brand and retailer collaboration with the world’s largest on-demand mobile workforce, also known as Gigwalkers. Prior to Gigwalk, Matt led software development teams at Yahoo! Buzz and HotJobs (starting in 2005), and led front end development for AOL Shopping and Alerts (starting in 2000).

Tammy Erickson is a McKinsey Award-winning author, a leading expert on generations in the workplace and a widely respected expert on collaboration and innovation, the changing workforce and the nature of work in intelligent organizations. She has three-times been named one of the 50 most influential living management thinkers in the world by Thinkers50, the respected ranking of global business thinkers. She is the founder and CEO of Tammy Erickson Associates, www.tammyerickson.com, a research-based firm of renowned thought leaders and senior business leaders committed to developing insights into the challenges that today’s businesses are facing.

Erickson is an Executive Fellow, Organisational Behaviour, at London Business School, where she has designed and co-directs the school’s premier leadership program for senior-most executives, Leading Businesses into the Future. She has written a trilogy of books on how individuals in specific generations can excel in today’s workplace: Retire Retirement, What’s Next, Gen X? and Plugged In, and is working on a fourth book for the generation under the age of 17 today. Tammy has authored or co-authored numerous Harvard Business Review articles and the book Workforce Crisis: How to Beat the Coming Shortage of Skills and Talent. She has served on the Board of Directors of two Fortune 500 corporations. She holds a Bachelor of Arts degree in biological sciences from the University of Chicago and an MBA from the Harvard Graduate School of Business Administration, where she was the recipient of the James Thomas Chirurg Fellowship.

Thank You

The SHRM Foundation recognizes all of the Thought Leaders Retreat presenters, planning committee members and other supporters for generously donating their time and expertise to make this event a success.
Marina Gorbis is a futurist and social scientist who serves as executive director at the Institute for the Future (IFTF), a Silicon Valley nonprofit research and consulting organization. In her 14 years with IFTF, Marina has brought a futures perspective to hundreds of organizations in business, education, government and philanthropy to improve innovation capacity, develop strategies and design new products and services. Marina’s current research focuses on how social production is changing the face of major industries, a topic explored in detail in her book, The Nature of the Future: Dispatches from the Socialstructed World. She has also blogged and written for BoingBoing.net, Fast Company, Harvard Business Review and major media outlets. A native of Odessa, Ukraine, yet equally at home in Silicon Valley, Europe, India and Kazakhstan, Marina is particularly well suited to see things from a global viewpoint. She has keynoted such international events as The Next Web Conference, NEXT Berlin, the World Business Forum, the National Association of Broadcasters annual convention, and the Western Association of Schools and Colleges annual conference. She holds a B.A. in psychology and a master’s of public policy from UC Berkeley.

Philip Lenowitz recently retired as the deputy director of human resources at the National Institutes of Health (NIH) in Bethesda, Md. In that role, Phil oversaw the delivery of HR services—from recruitment and hiring to education and training—to the NIH workforce of 19,000 employees. Under Phil’s direction, NIH was ranked first in AARP’s Best Employers for Workers over 50, co-sponsored by SHRM, making NIH the only federal agency to achieve this distinction. He has presented at a variety of conferences, including SHRM conferences, on issues such as recruiting and retaining the older workforce, and mentoring programs. Phil received his bachelor’s degree in industrial and labor relations from Cornell University and began his career in HR with the Veterans Administration (VA). As a labor relations specialist, Phil had the opportunity to travel the country representing the VA in union negotiations and arbitration hearings. After five years in DC, Phil began a second career as a stock options trader on the floor of the Philadelphia Stock Exchange and later formed his own broker-dealer company. He spent 11 years in this second career before returning to employee and labor relations at VA Medical Centers. He began his NIH career in the HR office at the National Institute of Environmental Health Sciences (NIEHS) in Research Triangle Park, NC. He then moved on to become NIH’s director of employee and labor relations. After retiring in April 2014, Phil continues to work part time as the senior advisor to the HR director, sharing his institutional knowledge with the senior HR leaders and mentoring the new deputy director. In addition, he serves on the Executive Steering Committee of the U.S. Department of Health and Human Services “Hire to Retire” Modernization Program.

Mark J. Schmit, Ph.D., SPHR, is the executive director for the Society for Human Resource Management (SHRM) Foundation. In this capacity, he leads the Foundation’s efforts to advance the strategic direction and impact of the HR profession. Dr. Schmit was previously the vice president of research for SHRM. Dr. Schmit has more than 25 years of experience in the field of human resources and has also been an academic, applied researcher, HR generalist, and internal and external consultant to both public and private organizations. Dr. Schmit earned a Ph.D. in industrial and organizational psychology from Bowling Green State University in 1994. He has published more than 25 professional journal articles and book chapters and delivered more than 75 presentations at professional meetings on HR and industrial/organizational psychology topics. Dr. Schmit is a Fellow in both the Society for Industrial and Organizational Psychology and the American Psychological Association. He is also certified as a Senior Professional in Human Resources (SPHR).

Jan Shimanski, Ph.D., is vice president, global talent solutions, for 3M. Previously, she was vice president, 3M global marketing excellence, and before that served as vice president, 3M international marketing and strategy, a $20B franchise for 3M with over 4,000 marketing professionals. Jan rejoined 3M in April 2008 after a 12-year career at Medtronic, Inc. At Medtronic, Jan was most recently the vice president of marketing for Medtronic’s $1B Diabetes business in Los Angeles, Calif. Jan started at Medtronic as the U.S. marketing director, interventional vascular, in
1996. In 1998, she joined Medtronic’s Cardiac Surgery business as director of minimally invasive cardiac surgery, where she ran strategy and business development. In 1999, she was promoted to vice president, e-business and corporate accounts, within the Cardiac Surgery business. In 2000, she assumed the position of vice president, corporate strategy, where she worked directly with the CEO to develop Medtronic’s corporate strategy and five-year strategic plans. In 2002, Jan became the vice president and general manager of Medtronic’s Blood Biologics business, a position she held for three years. Prior to joining Medtronic, Jan worked at 3M Company for 10 years in a variety of health care and device-related marketing positions. Jan has her Bachelor of Arts and Master of Science in business from the University of Wisconsin – Madison. She earned her Ph.D. in business from the Carlson School of Management at the University of Minnesota, with a dissertation titled “Patterns of Strategic Change in Firms from Start Up through Adolescence.”

Heidi Spirgi is senior vice president of Appirio’s Strategy Services practice. Appirio is a global services company that uses cloud technology and a community of technical expertise to reimagine the way you do business. She leads a team responsible for helping organizations be more thoughtful and strategic in planning for their technology investments, including looking at the people and process components. She is the former president and co-founder of Knowledge Infusion. Ms. Spirgi has more than 15 years of experience in HR and talent management. Previously, Ms. Spirgi led product marketing for PeopleSoft’s Learning Management solution, including developing the strategy that launched the product into its rapidly growing presence in the learning management systems (LMS) market. Prior to that role, she held a series of marketing, strategy and sales positions within PeopleSoft, including a period of time in strategy for the financial services, retail and manufacturing industries, as well as with PeopleSoft University.
leading HRMS sales training. Prior to joining PeopleSoft, she held a position as a senior HRMS business analyst for Seagate Technology and Swiss Bank Corporation in Zurich. Ms. Spirgi frequently authors thought leadership articles and speaks at conferences on the topic of learning and development trends and technologies. She has been active in ASTD, IHRIM and the eLearning Guild and holds a Bachelor of Arts degree from the University of Michigan and a master’s degree from UCLA.

Gary Swart is an advisor, mentor and investor. Until April 2014 he was the CEO of oDesk, the world’s largest online workplace, which has more than 5 million registered contractors and over $1B in work delivered through the platform. Gary is a thought leader in entrepreneurship; how best to hire and manage teams; and the future of work, including online work. He is passionate about helping small businesses thrive, fueled by his extensive experience working with startups and small businesses and mentoring entrepreneurs and business school students. Gary has spoken at the Inc. Leadership Conference, The Economist’s Ideas Economy panel, South by Southwest, TechCrunch 50, TiECon, GigaOM’s Net:Work Conference, and at Harvard Business School, which teaches a case study on oDesk. His commentary has appeared in a variety of publications, including Forbes, TechCrunch, The Washington Post and The Next Web. He has also appeared on TV and radio shows, including the BBC, National Public Radio, CNBC and Bloomberg TV and Startups Uncensored. Previously, Gary led SMB Sales for the Americas at IBM’s Rational Software Product Group and also served as VP of worldwide sales and operations at Intellibank. Gary holds a B.S. in business administration from the University of Maryland.

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Save the Date!
The 2015 Thought Leaders Retreat will take place October 7-8, 2015, at the JW Marriott Hill Country Resort and Spa in San Antonio, Texas, USA.

At the SHRM Foundation, we are a catalyst for thought leadership. We help predict where the workforce is headed because we’ve been studying its evolution for over 40 years. Our mission is to offer unmatched human capital knowledge for the benefit of professional organization leaders with a total focus on studying and reporting the management practices that work. Supporting the Foundation is a chance to contribute to an ongoing study about the direction of human resources in society. The Foundation is governed by a volunteer board of directors, comprising distinguished HR academic and practice leaders. Contributions to the SHRM Foundation are tax-deductible. The SHRM Foundation is a 501(c)(3) nonprofit affiliate of the Society for Human Resource Management (SHRM). For more information, contact the SHRM Foundation at (703) 535-6020. Online at www.shrmfoundation.org.