

Shaping The Future of Workforce Mobility

CERC 2005 CONFERENCE

Sheraton on The Falls
Niagara Falls, Ontario
October 23-25, 2005

At-a-Glance

Saturday

8:30 – 11:00
(AM) (PM) Optional Pre-Conference Activities

Sunday

9:00 – 12:00 CERP Exams (Pre-Registration is required)

10:00 – 5:00 Optional Pre-Conference Activities

4:30 Registration Opens

6:00 – 7:00 First Time Attendees Orientation

7:00 – 10:00 Welcome Reception and Exhibits

Monday

7:30 – 8:15 Breakfast

8:15 – 9:15 WELCOME & OPENING KEYNOTE ADDRESS

- **Workforce Mobility: A North American Context**

9:15 – 10:00 PLENARY SESSION

- **Canada's Future Workforce and What Needs To Be Done About It**

10:00 – 10:45 Exhibits & Refreshment Break

10:45 – 11:30 PLENARY SESSION

- **Labour Needs: Cutting The Red Tape and Building Partnerships**

11:30 – 12:15 PLENARY SESSION

- **Security and Cross-Border Mobility**

12:15 – 1:00 Lunch

1:00 – 2:00 Exhibits (Last Chance)

2:00 – 4:30 CONCURRENT WORKSHOPS

- **Workshop 1: Canada/U.S. Relocation Taxable Benefit Issues**
- **Workshop 2: Household Goods Tariffs**
- **Workshop 3: Cost of Living Differentials Within Canada**
- **Workshop 4: International Goods and Services Allowances and Currency Fluctuations**
- **Workshop 5: Cross-Border Immigration**
- **Workshop 6: International Immigration**

6:00 – 10:00 Networking Night

Tuesday

7:30 – 8:30 Breakfast

8:30 – 10:00 CONCURRENT SESSIONS

- **Corporate and Service Partnerships**
- **Outsourcing: A First-Hand Look**
- **International Policy Design**

10:00 – 10:30 Refreshment Break

10:30 – 12:00 CONCURRENT SESSIONS

- **RFP Issues: The Debate Continues**
- **Relocation Policy Case Study**
- **Relocating Spouse and Family Assistance**

12:00 – 2:00 Lunch & CERC Annual General Meeting

2:00 – 3:30 PLENARY SESSION

- **The Summit of The Falls**

3:30 – 3:45 Refreshment Break

3:45 – 5:00 CLOSING ADDRESS

- **Skills and Resource Leadership for The 21st Century**

6:00 – 6:30 Cocktails/Cash Bar

6:30 – 9:30 Closing Gala Dinner & CERC Awards

Exhibitors

Don't miss this opportunity to visit the various exhibits showcasing the latest workforce mobility products and services.

ACS International Schools

AIRINC

Allied Van Lines

Atlific Hotels & Resorts

Brytor International Moving

Cambridge Suites Hotel, Toronto

Cartier Place Suite Hotel

CERC

Crown Relocations

Delsuites

ECA International

Educational Connections

Executive Furniture Rentals

Hilton Canada

InterContinental Hotels Group

L. Hansen's Forwarding

Living Abroad, LLC

MAC Furnished Residences

Mayflower Canada

North American Van Lines

Pillar To Post

Premiere Executive Suites, Montreal

PricewaterhouseCoopers LLP

Primacy Relocation, LLC

Prudential Relocation Canada

RBC Royal Bank

Residence Inn by Marriott

Royal LePage Relocation Services

Runzheimer International

Searail

SoHo Residences at
the SoHo Metropolitan Hotel

Taylor Moving and Storage

The Waterside Inn

TheMIGroup

Today Living Group

Toronto Suites

UNIRISC

United Van Lines

Vandover

Weichert Relocation Resources

Welcome Wagon

Westmont Hospitality Group



Shaping The Future of Workforce Mobility

CERC 2005 CONFERENCE

In an ever-changing and increasingly global marketplace, workforce mobility has never before been so important to Canada's future economic prosperity. This year's Conference is guaranteed to develop a fruitful dialogue between industry and the respective government agencies that control and influence policies governing the movement of people for business. It will also deliver the tools you need to ensure that you have the very best relocation policies and practices in place to recruit and retain employees for your organization.

"...a great place to network with your peers and to meet new contacts in the industry."

— Leslie Smith, Noranda/Falconbridge

Opening Keynote speaker The Honourable John Manley, former Deputy Prime Minister of Canada, will share his views and insights about workforce mobility in a renewed North American context... while David Baxter of The Urban Futures Institute will provide one of the most comprehensive commentaries available today on the future of Canada's workforce... and to close this year's Conference, noted author and Keynote speaker Jim Carroll will engage our thinking and provide a perspective on why innovation is critical to our future and how we can become more innovative in our own organizations.

To bring you the most current information available we've developed a broad spectrum of sessions dealing with everything from RFPs, to vendor relations, to cross-border relocation policy case studies and outsourcing discussions. A new series of mini-workshops has been designed to further provide you with hands-on learning and problem-solving opportunities in an intensive and focused learning environment. From our interactive panels you will gain an appreciation for the future directions of Canadian Immigration and Human Resources Skills Development Canada for both the recruitment of workers and cross-border issues covering security and privacy. We've also assembled a blue-ribbon panel of industry leaders and senior managers from some of Canada's best employers for **The Summit of The Falls** where we'll explore the changing face of relocation as well as the challenges and critical issues shaping workforce mobility.

Networking is always a highlight of the Conference with opportunities to meet other industry leaders and peers. For those attending their first CERC Conference the tradition continues as we extend a very warm welcome into the CERC "family" at a special **First Timers' Reception**. Sunday evening's **Welcome Reception** is a time to reconnect with friends and forge new relationships, while Monday's **Networking Night** provides a relaxing and informal atmosphere for a perfect evening of networking. You should also plan to attend our **Closing Dinner**, which over the years has become an integral part of the Conference experience and will feature our annual presentation of the CERC Awards of Recognition.

We invite you to join us in Niagara Falls for the industry's premier event of the year. This is your opportunity to help shape the future of workforce mobility in Canada. You are sure to leave with a better understanding of the challenges of the future and the knowledge to meet these challenges head-on for your organization.

**Come to learn, come to grow
and come to network.**



 **CERC**
Leadership for Workforce Mobility

Monday Sessions

8:15 – 9:15 KEYNOTE ADDRESS

Workforce Mobility: A North American Context

**The Honourable John Manley,
former Deputy Prime Minister
of Canada**



Canada and the U.S. share the world's largest unprotected border and our economies and future prosperity are equally intertwined. Within this common economic environment, corporate head offices and managers on both sides of the border are concerned about access to a skilled and well-trained future workforce. In particular, Canada needs more open and flexible workforce mobility policies that will allow business to attract and retain the brightest and the best. In this exclusive Keynote Address, you will hear from one of Canada's most respected and influential leaders about the challenges facing Canada in an increasingly global marketplace – and the solutions needed to address those challenges.

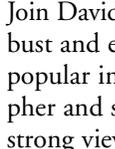
John Manley has been recognized for his achievements in forging powerful cross-border partnerships and for his global initiatives in technology, education and business. Following 9/11 he became Chairman of a new Cabinet Committee on Public Security and Anti-terrorism. For this role, he was named TIME Canada Magazine's "Newsmaker of the Year." He also recently chaired an Independent Task Force on the Future of North America "Creating a North American Community" which provided insights about the shared future of Canada, the U.S. and Mexico.



9:15 – 10:00 PLENARY SESSION

Canada's Future Workforce and What Needs To Be Done About It

**David Baxter,
Executive Director
Urban Futures Institute**



Join David Baxter as he dispels the "boom, bust and echo" theories of labour supply popular in the 1990s. A noted demographer and social commentator, he holds strong views on where Canada's future workforce will come from and what steps industry and governments need to be taking today in order to head off the critical shortage of workers emerging over the next decade. This shortage is already evident in the fact that Canada is experiencing its lowest unemployment rate in a quarter century. Creativity and innovation will be the backbone of future prosperity and Canada must do more to improve its performance. Drawing on a wealth of research studies and practical experience, David Baxter will share his observations about the future workforce and insights on the society of the future.

10:45 – 11:30 PLENARY SESSION

Labour Needs: Cutting The Red Tape and Building Partnerships

**Chantal Ramsay, Ontario Ministry of
Economic Development and Trade**

**Wendy Lack, Shoppers Drug Mart;
David Baxter, Urban Futures
Institute; Sergio Karas, Karas &
Associates; A representative from
Citizenship and Immigration Canada;
Nadine Heaslip, Human Resources
and Skills Development Canada**

The need for foreign talent in Canada has never been greater. Today you may not rely on foreign worker recruitment but as the demand increases and supply decreases, organizations will need all the tools available to ensure they have the needed skills.

What is the role of our federal government agencies – Citizenship and Immigration Canada and Human Resources and Skills Development Canada (HRSDC) – in assisting corporate Canada to get access to this talent? Are these agencies partners or more red tape in the workforce mobility process? Hear first-hand from senior officials about the important role these agencies play and how their services can help your organization. Our panel comprised of industry and government representatives will explore the strategies that you can take today to improve your foreign worker recruitment programs.

11:30 – 12:15 PLENARY SESSION

Security and Cross-Border Mobility

MODERATOR

**Henry Chang, American
Immigration Lawyers Association
Canada Chapter**

PANEL

**Jim Phillips, Canadian/American
Border Trade Alliance; Samuel Tirano,
U.S. Customs and Border Protection;
A representative from the Canada
Border Services Agency**

How can we ensure cross-border mobility in a world consumed with security issues? Join this panel of industry experts as they examine the programs to facilitate legitimate business travel between Canada and the U.S. that need to be developed, promoted and expanded. We'll also review existing border and airport conditions and focus specifically on possible new programs that seek to distinguish between high and low risk business travelers. The discussion will also address cross-border information sharing in the age of security and personal privacy issues that drive policy change. If you have cross-border travelers, this is one session that you won't want to miss.

PRESENTED IN PARTNERSHIP WITH
THE AMERICAN CHAMBER OF COMMERCE IN CANADA



Shaping The Future of Workforce Mobility

2:00 – 4:30 CONCURRENT WORKSHOPS

Each workshop is 45 minutes in length and each will be presented twice during the course of the afternoon. Specific times for the workshops are indicated at the beginning of each description.

Workshop 1: Canada/U.S. Relocation Taxable Benefit Issues

Laurie Marsh, RE/MAX Relocation

2:00 – 2:45 | 2:50 – 3:35

In this workshop we will review Canada/U.S. Relocation Taxable Benefit issues, including the 11-step program and the forward attribution rule. The session will include examples of how companies relocating employees domestically within both Canada and the U.S. keep their programs equitable under the different tax rules. You can expect to learn more about the importance of the 11-step program in keeping taxable benefit protection to a minimum and gain knowledge of the different tax rules in the two countries and how to deal with them equitably between employees.

Workshop 3: Cost of Living Differentials Within Canada

Gail Reinhart, TheMIGroup

2:00 – 2:45 | 2:50 – 3:35

This session will review the structure and administration of cost-of-living assistance (COLA) including data from the 2005 CERC Policy Survey. Information on the components of cost-of-living differentials and the benefits to both the employee and corporation will be reviewed and discussed. Bring your questions and ideas as there will be time for interactive discussions. Participants will strengthen their knowledge of: the design and administering of a COLA program; the basic tax implications of COLA; the issues and challenges of cost-of-living differentials; and why a corporation would choose to use COLA.

Workshop 5: Cross-Border Immigration

Nan Berezowski, Reikai Frankel LLP

2:50 – 3:35 | 3:45 – 4:30

Cross-border mobility presents one of the most complex problems for organizations with business between Canada and the U.S. This session will address the most common problems with U.S. and Canadian work-permits and visas. Key legal requirements of work-permit options and issues of contention will be covered, together with red flags for companies seeking to obtain the documents required for employees to work in the U.S. and/or Canada. Participants will leave with an improved knowledge of the complexity and the key legal requirements of cross-border immigration as well as a wider understanding of the importance of ensuring the work-permit application is completed correctly to ensure employees have clearance to work in Canada and/or the U.S.

Workshop 6: International Immigration

Suzanne de Lint, Greenberg Turner

2:50 – 3:35 | 3:45 – 4:30

This session will provide an overview of the key elements of the application process for visa for intended work commencement and that of work and/or stay permits. A leading authority on international immigration, Suzanne de Lint will highlight issues of contention and red flags for organizations seeking to obtain the authorizations required for employees to work internationally. Participants will gain a better understanding of the legal environment and the importance of making sure all documentation is complete to ensure that the employee can work and live in the destination country. You will also learn about the processes involved in international assignments and how to avoid both corporate and employee legal exposure. If you have international assignments, don't miss this opportunity to ensure you have the right tools in place to support your employees.

Workshop 2: Household Goods Tariffs

Larry Mitchell, United Van Lines

2:00 – 2:45 | 3:45 – 4:30

This session will discuss how Household Goods Tariffs are compiled including a practical guide to understanding and creating effective practices, with an overview of what should and should not be included. We will address the obstacles that face organizations and service providers as well as the new changes in pricing techniques. Participants will leave the session with a greater understanding of the complexity of Household Goods Tariffs and how they apply to corporate moves.

Workshop 4: International Goods and Services Allowances and Currency Fluctuations

Lynne Molnar, ORC WorldWide

2:00 – 2:45 | 3:45 – 4:30

Goods and Services Allowances can become a runaway expense on an international assignment. This session will discuss the need for Goods and Services Allowances on international assignments and how currency fluctuations can affect the calculation of the allowances. Participants will gain a better understanding of the necessity for accurate Goods and Services calculations and the importance of keeping those calculations current throughout the assignment to capture changes in spending patterns and currency fluctuations.



Tuesday Sessions

8:30 – 10:00 CONCURRENT SESSIONS

Corporate and Service Partnerships

MODERATOR

Kate Kelley-Dilts, National Equity

PANEL

Bob Croteau, Weichert Relocation Resources; Fred Haladay, Atlas Van Lines; Joy Morrison, PepsiCo

The interrelationship is essential, but how do corporate managers and service providers work together? This interactive panel will explore the best practices for a long and rewarding relationship. Attend this session and learn how to set mutually agreed expectations... transfer the corporate culture and priorities... develop outstanding communications... ensure successful transition of existing processes and procedures... resolve problems effectively and quickly... and develop a relationship based on honesty and integrity. Hear about the tools used to track progress towards these goals including Service Level Agreements and technology applications. An invaluable session for service and corporate delegates alike.

Outsourcing: A First-Hand Look

MODERATOR

Bruce Sprague, Ernst & Young LLP

PANEL

Joanie Mitchell, Moneris Solutions; Emree Siaroff, Noranda/Falconbridge

This session will provide practical guidance to those organizations considering an outsourcing engagement or contemplating which functions to outsource. Hear from a panel of seasoned experts who have experienced first-hand the challenges of outsourcing functions within their organizations. You'll hear more about: what functions were outsourced and why; the lessons learned from their outsourcing experience; and the best practices in outsourcing.

International Policy Design

Linda Ward O'Farrell, Ward O'Farrell Consultants

If you have responsibility for global assignments, you understand the need for effective international mobility practices. Applying a global mobility strategy to designing international policy differs from a Canadian-centric approach. Selecting the right approach can be critical to the success of a corporation's business operations. Attend this session to gain...

- A better understanding of the differences between relocation policies using Canada as a baseline design and those that are globally designed.
- An appreciation of the strategy, rationale and effectiveness of both the Canadian-centric and truly global approaches.
- The tools to determine which is the preferred option for your corporation, and how existing policies stack up.
- Increased knowledge of how to "sell" international policy changes to your executive team.

10:30 – 12:00 CONCURRENT SESSIONS

RFP Issues: The Debate Continues

Andrew Pierce, Royal LePage Relocation; Wade Cuthbertson, Cuthbertson Macdonell & Associates

Requests for proposal (RFP) continue to be the preferred method for selecting service providers, but there are many questions about the process...

- Is a formal RFP approach the most effective selection method?
- Do RFP decisions always boil down to price?
- Who really makes the selection decision?
- Is being creative in a bid response a wise move?
- E-Bids: the next great innovation in supplier selection?
- Just how important are RFP debrief sessions?
- How much time should be provided to suppliers to respond to an RFP?

Get the answers to these and many more issues from corporate managers and service providers in this engaging session and hear about the hottest topics in RFPs today.



"Well planned with informative presentations on a wide variety of topics."

— Laurel McLean, Enbridge

Shaping The Future of Workforce Mobility

Relocation Policy Case Study

MODERATOR

Kate Kelley-Dilts, National Equity

PANEL

**Terry Snare, Smurfit Stone;
Joy Morrison, PepsiCo;
Lynn Robinson, EnCana**

We've assembled a blue-chip panel of seasoned corporate managers to share their experiences relating to domestic and cross-border transfers. You'll have a chance to discover how they manage the challenges of transfers for their organizations effectively. You will gain tremendous insight on...

- The evaluation of policy development in different corporate cultures.
- What drives the variance of intra-Canada and U.S. vs. cross-border policies.
- Policy components including new hire benefits.
- Managing the expectations of cross-border relocations.

If you want to gain knowledge from peers in the industry, don't miss this session.

Relocating Spouse and Family Assistance

Ed Marshall, Vandover

While numerous industry studies show spouse and family issues rank among the top concerns when considering relocation acceptance – and often is the reason relocations are turned down – why do we still treat relocating spouse and family assistance as a “soft” issue for relocation benefits? Canadian organizations invest well over \$1 billion per year on relocations. When you add globalization and the search for diversified top talent into the equation, it becomes clear that family issues require greater attention to maximize this huge investment. This session will help relocation professionals determine what supports can be provided to career and non-career minded spouses and families, at what costs, and includes a demonstration of potential investment paybacks.



2:00 – 3:30 PLENARY SESSION

Summit of The Falls

MODERATOR

Stephen Cryne, CERC

PANEL

**Joanie Mitchell, Moneris Solutions;
Louis Lagace, Canadian National
Railways; Joseph Palumbo,
Schulich School of Business,
York University; Jim Lockington,
Royal LePage Relocation; James
Simon, Prudential Relocation**

Workforce mobility continues to evolve in response to changing market demands and realities. The CERC 2005 Policy Survey highlights much of the change that is underway. What are the strategies being employed by forward-thinking and progressive companies when it comes to the search for talent? What supports and policies are needed to recruit and retain the brightest and the best employees? Where will your organization look for its workforce of the future and what plans do you need to be making today? Where are the challenges and opportunities of the future? How are suppliers preparing to support corporate clients through these new realities? From offshoring to outsourcing to the future of HR, these and many more “top of mind” issues will be covered by this engaging panel of business leaders.



*“It gets better
every year.”*

— Sylviane Diotte,
Canada Mortgage and
Housing Corporation



3:45 – 5:00 CLOSING ADDRESS

Skills and Resource Leadership for The 21st Century

**Jim Carroll,
Futurist and Trends Expert**



After 100 years, StarKist finally got rid of its tin can, replacing it with a new resealable plastic tuna pouch. \$200 million of new revenue later, they've realized the benefit of aggressive change and innovation. So it is with the issues surrounding the corporate workforce. Our future is now being driven by ever-increasing skills shortages, heightened competition for talent, rapidly changing business models and extremely different career attitudes among our younger generation. You might still be basing your future on your old “tin-cans” unable or unwilling to change. It's time to turn these trends and challenges into opportunity. Noted futurist, innovation and trends expert Jim Carroll provides an integral message... opportunity comes from our ability to innovate and change, to adapt and evolve in response to a world that's changing at a furious pace. Join Jim Carroll in this Keynote Address as he leaves you well positioned to realize how to achieve the most by abandoning your own “tin cans” and by learning how your future success can come from your ability to excel – and not rebel – with the future.

6:00 – 9:30



Closing Gala Dinner & CERC Awards

The tradition continues. Be sure to join your friends and colleagues in our closing festivities. It's an integral part of the Conference experience and a perfect way to celebrate and strengthen the relationships that are so important in our community. With fine fare and local entertainment on hand, it will be an evening filled with fun and warm fellowship as we recognize the achievements of our members and applaud the support of our sponsors.

Behind the Scenes

Conference Planning Committee

Bob Johnson – Chairperson, TheMIGroup
Tricia Cochran, Royal LePage Relocation Services
Stephen Cryne, CERC
Nancy Dapp, TransCanada Pipelines
Linda Dietz, RE/MAX Relocation Europe
Kathleen Kelley-Dilts, National Equity
Sheena Lund, RBC Financial Group
Tony Papalia, Berlitz Canada
Bruce Sprague, Ernst & Young LLP

Niagara Falls Social Planning Committee

Janet Oxtoby – Chairperson,
Prudential Relocation Canada
Scott Gordanier, Mackie Moving Systems
Margot Lockhart, Hilton Canada
George Muir, King's Transfer Van Lines
Kathleen Vorbrodt, Manulife Financial
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Become a CERC Member Today

Our mission is to be the centre of excellence for education, research and knowledge transfer and to provide a voice that advances and supports the interests of our members for workforce mobility.

CERC is the leading provider of professional education and information to the relocation industry. With over 500 members, our unique membership consists of organizations that relocate thousands of employees each year and companies that provide relocation services.

As a CERC member you'll have access to the vital information you need to make informed decisions when relocating employees and become more effective in your own organization. Membership benefits include access to...

- Personal and professional growth through the CERC Certified Employee Relocation Professional Program – CERP™.
- A comprehensive library of relocation and mobility policies from some of the top Fortune 500 companies in Canada.
- Vital information about industry trends and developments through the CERC Report on Mobility.
- The latest industry news and information in the monthly CERC eNews.
- CERC's Employee Relocation Policy Survey and other research information to ensure your practices and policies are competitive and effective in recruitment and retention of key staff.
- Extensive opportunities to network and learn more about workforce mobility in National and Regional Conferences and Workshops.
- The CERC Industry Roster.
- A strong voice effecting change and influencing government policy and regulations on workforce mobility issues.
- The "Members Only" section of our website, including an exclusive members forum, career section and a wide range of electronic publications and information.

If you have any responsibility for workforce mobility or employee relocation, a membership in CERC will deliver significant dividends for your organization and your own career.

Join today with your Conference Registration and receive a \$70 discount on your membership fee of \$425.

*"The right mix of education
and networking is much appreciated."*

— Pascale Thivierge, Centre for Intercultural Learning,
Foreign Affairs Canada

Canadian Employee Relocation Council (CERC)

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To learn more about CERC or
to join online, visit www.cerc.ca.



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Leadership for Workforce Mobility