



Managing Health Benefits is a Process, not a Vendor Driven Product Sold or Promoted

Public employers continue to need leadership guiding effective practices in benefits. USI's endorsement from the WASB Insurance Plan supports our commitment to promote full understanding and engagement at all stakeholder levels around the **cost, compliance and cultural** implications with all benefits considerations.

The USI team's past 3 decades of experience working with districts has seen a common thread among the most successful districts. Successful districts prioritize benefits with regular oversight of updated information, communication and consistent checks and balances throughout the year. **In other words, they have a strategic benefit plan (process).**

Purpose – Strategic benefits planning is a process designed to assist in achieving short- and long-term benefit goals. The plan includes:

1. An understanding of the district objectives and its relationship to benefits
2. An understanding of current benefit program strengths and weaknesses
3. An understanding of industry trends and external factors which influence its benefit plan
4. An understanding of the specific benefit needs and wants of the staff members and administrative staff
5. Guiding principles on the future (vision statement)
6. Outlined categories to focus on methods for moving from the current state to the preferred future

Phase 1: Discovery!

If you are wondering where to start; seek first to understand. The purpose of this step is to ensure the process of planning is achieved with a strong sense of its relationship to the bigger picture of where the district is heading.

In both sports and district administration, it is the successful execution of the "game plan" that often determines the winner. Therefore, the strategic benefit plan must play the correct role in supporting and complementing the overall compensation and recruiting strategy.

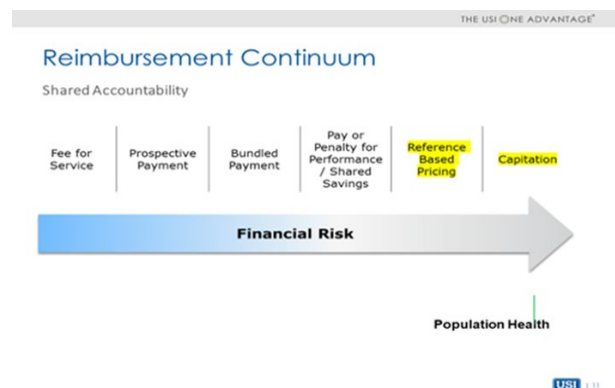
The success or failure of the process really depends on this phase. Don't skip through this step. Understand who are the key stakeholders.

The person who is facilitating the process and answering questions may want to be removed from the current setup to avoid being defensive of the present status. Having a cross section of voices to freely respond to areas of strength, weakness, opportunity and threat of the present state is the objective.

Phase 2: Learning / Education!

This is a key step that takes place after listening to all the key stakeholders and understanding what is most important to each. The stakeholders need to know you care before they care about what you know.

Now that you established you are listening in phase 1 and are addressing areas of the collective focus, educating the team on fundamentals of benefits, claims impact to premium, compliance areas, peer group benchmarks and financial projections is a standard foundation.



Common discussions for all sizes and locations of districts are faced with challenges around:

- Prescription costs and the impact of gene therapies to overall costs and impact to the staff members quality of life.
- Access to primary care and understanding how to apply best practices to their district situation.
- How to compare captives, self-funding, clinics, reference based pricing, etc. etc...



Phase 3: Planning and Setting the Course!

Build Plan

- Confirm vision
- Prioritize overall objectives
- Set short-term (1-2 year) goals and strategies
- Set long-term (3-5 year) goals and strategies
- Establish milestones – specific assessment points
- Executive summary
- Work plan by month and year

This phase becomes an especially important piece of the process as districts are getting calls from vendors stating that their approach is the solution to the district problems without the salesperson knowing the history or specific employer dynamics. Building selected areas of interest into a timeline and consideration process is critical for all to be part of the process and understand how the decision will be made in objectively comparing the options year over year.

New vendors or newer industry reps may be short sighted in their sales pitch to their prospective opportunities and fail to articulate the full financial, cultural and compliance picture promoting savings in the months creating a premature picture that isn't objectively compared.

In an effort to help explain how some districts have applied objective planning and best practices, join us **Thursday, February 22, 2024 | 9:00 a.m. to 10:00 a.m.** as we review highlights from highly attended and acclaimed presentations at the Wisconsin State Education Convention in Milwaukee as both Scott Fuller and Al Jaeger (both 25+ year consultants) abbreviate the presentations done with districts and share highlighted feedback received from the attending board members and administrators.

Pay Your Staff, Not Your Insurance Company

Learn how several districts that are smaller in size have not only controlled and reduced their health care

spending, but also how they are reinvesting those dollars directly toward compensation and additional benefits to staff. Attendees will see examples of tools that have helped lower health care costs, creative strategies for reinvestment and how better benefits lead to improved staff retention and workplace culture.

Population Health Strategies

Improving population health in the long term doesn't happen by accident, and there isn't a single solution that works for all. Learn how districts from different parts of the state have succeeded based on specific needs they have to support their culture, budget, plan design, demographics and more. These districts are not using an approach that is a product sale nor one size fits all... it is a sustainable foundation of principles that have evolved over decades of focus on national and local best practices on the forefront. Learn the spectrum of a population health strategy that meets your district's needs.

You will learn from both of these presentations how Happier Healthier Workforce may have a simple formula, but it isn't easy and it does require substantial leadership, substantial engagement and resiliency on pursuing the outcome.

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[Contact us for additional resources and guidance on this value-added service.](#)

How can we help?

Experience the USI ONE Advantage® and learn how our highly specialized solutions and services can improve your employee benefits program.

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