

Strategic Benefit Plan

Action Timetable



CLARKE & COMPANY
BENEFITS LLC

	Start	Complete	Clarke & Company Benefits, LLC Responsibility	ABC Inc. Responsibility
1. Planning Phase/Meeting				
- Determine objectives	3/15/2017	7/21/2017	X	X
- Determine scope of project	7/21/2017	7/21/2017	X	
- Discuss timetable	7/21/2017	7/21/2017	X	X
- Send employee benefit data request to main contacts	7/15/2017	7/15/2017	X	
2. Information Review				
- Historical claims data	7/21/2017		X	X
- Biomtric Results	7/21/2017	7/21/2017	X	X
- Data Package	7/21/2017	7/21/2017	X	X
- Results and Recommendations on Cost Control	7/21/2017	7/21/2017	X	X
- Review funding alternatives	7/21/2017	7/21/2017	X	X
- Review Market Analysis	10/15/2017	10/31/2017	X	X
3. Discuss Potential Plan Design Changes				
- Provide relevant benchmarking information and survey results	8/1/2017	9/1/2017	X	
- Evaluate current plan design offerings	7/21/2017	11/1/2017	X	X
- Discuss projected rate increases	7/21/2017	11/1/2017	X	X
- Discuss potential changes based on claims analysis, benchmarking, etc.	7/21/2017	11/1/2017	X	X
- Examine cost-cutting measures such as changing deductible, copay, other employee-cost sharing mechanisms	7/21/2017	11/1/2017	X	X
- Discuss employee vs. employer contributions - where are they, where do you want them to be?	7/21/2017	11/1/2017	X	X
- Discuss consumer-directed health plan options (HRA, HSA, FSA):	7/21/2017	11/1/2017	X	X
- Discuss impact on recruiting and retention efforts	7/21/2017	11/1/2017	X	X
- Evaluate how your company culture aligns with CDHP options	7/21/2017	11/1/2017	X	X
- Decide if CDHP would replace existing plan or be side-by-side	7/21/2017	11/1/2017	X	X
- Discuss need for high-deductible health plan if choosing HSA or HRA	7/21/2017	11/1/2017	X	X
- Choose deductible and how much company will contribute to HSA or HRA	7/21/2017	11/1/2017	X	X

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- Discuss implementation plan, including timeline and employee education	7/21/2017	11/1/2017	X	X
4. Develop Vendor Bid Specifications				
- Discuss desired vendor services and create list	8/15/2017	9/15/2017	X	X
- Wellness vendor?	9/15/2017	10/15/2017	X	X
- HSA/HRA/FSA vendor?	11/1/2017	12/1/2017	X	X
- Carriers?	9/15/2017	10/15/2017	X	X
- Administrators?	9/15/2017	10/15/2017	X	X
5. Vendor Selection				
- Conduct preliminary review of proposals	10/15/2017	10/30/2017	X	X
- Conduct reference checks	11/15/2017	11/30/2017	X	X
- Evaluate proposals	11/15/2017	11/30/2017	X	X
- Conduct on-site review of finalists	11/15/2017	11/30/2017	X	X
- Conduct rate negotiations with finalists	11/15/2017	11/30/2017	X	X
- Negotiate contractual provisions	11/15/2017	11/30/2017	X	X
6. Plan and Implement Wellness Initiatives				
- Evaluate current wellness offerings	7/21/2017	7/21/2017	X	
- Discuss importance and ROI of wellness initiatives and how they can help accomplish company goals	7/21/2017	7/21/2017	X	X
- Develop goals and objectives of your wellness program	7/21/2017	9/1/2017	X	X
- Discuss enhancements to make to wellness offerings or new programs to implement	7/21/2017	9/1/2017	X	X
- Create an implementation plan to roll out new initiatives	9/1/2017	10/1/2017	X	X
- Create a communication plan to promote and support new and ongoing wellness initiatives	11/1/2017	1/1/2018	X	X
- Develop a plan for periodic measurement and evaluation of wellness program goals and effectiveness	7/21/2017		X	X
7. Enrollment				
- Evaluate past open enrollments; identify areas to improve	10/1/2017	10/30/2017	X	X
- Discuss options to improve enrollment process, both for HR and employees	10/1/2017	10/30/2017	X	X

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- Promote and educate in advance of open enrollment, including any changes made to benefit offerings	12/1/2017	2/1/2018	X	
- Plan benefits meeting(s)	11/1/2017	11/15/2017		X
8. Employee Communications				
- Review prior/current communications	11/1/2017	11/15/2017	X	X
- Discuss where communications are lacking and where you would like to add	11/1/2017	11/15/2017	X	X
- Develop new communication plan - will it include:	12/1/2017	12/20/2017	X	X
- Health and wellness materials	12/1/2017	12/20/2017	X	
- Benefits education (new benefits rollout and/or how to use current benefits)	1/1/2018	1/20/2018	X	
9. Compliance				
- Discuss any hurdles or concerns with compliance	7/21/2017	7/21/2017	X	X
- Same Sex Marriage (Special Enrollment)	7/1/2017	7/30/2017		X
- Large Employer Reporting	12/1/2017	1/31/2018	X	X
- SBC Distribution	1/1/2018	1/1/2018	X	
- Form 720 Filing	Completed	Completed		X
- Wellness plan	7/21/2017	10/1/2017	X	
- 5500 Filing	8/1/2017	8/30/2017	X	X