

**Fisher Associates**  
**STRATEGIC INITIATIVES - 2020-2021**

Action	Responsible Party	Comments	Expected Completion	Open/Closed
Captive Meeting	Lawley/Fisher Associates	Fisher Associates invited to attend our Captive meeting in Skaneateles to learn more about Captive Programs	June 20th	Open
Lawley Awarded Broker of Record	Lawley		07/01/20	Open
Enroll Fisher Associates in HR hotline Service through Mywave	Lawley/Fisher Associates	HR hotline to ask questions to HR professionals	07/01/20	Open
Compliance Review	Lawley/Fisher Associates	Lawley will provide overview of compliance services and resources available and introduction of Judy Kamens --Compliance Specialist at Lawley	07/15/20	Open
Data Gathering	Lawley/Fisher Associates	Lawley will obtain all necessary information from carriers, rates, plan design and <b>benchmark</b> against our book of business and make recommendations	8/1/20	Open
Wellness Discussion	Lawley/Fisher Associates	Introduction of Nicole Sproba, Wellness Consultant, at Lawley to discuss strategies around building a wellness program	08/15/20	Open
Alternative Funding Discussion	Lawley/Fisher Associates	Lawley in conjunction with underwriting team will educate Fisher Associates on options for funding medical plan -- <b>fully insured, captive, self-funding</b>	08/20/20	Open
Medical Rates Discussion	Lawley/Fisher Associates	Lawley in conjunction with underwriting department will provide information on how medical rates are developed specifically in the covid-19 world ---"Dip Analysis"	TBD	Open
Market Medical & Group Insurance	Lawley	Review and market lines of coverage (Medical, Dental, Vision, Disability and Life) to appropriate carriers and TPA's.	08/24/20	Open
Deliver 2021 Renewal / Marketing Results	Lawley	Deliver 2021 renewal binder to Fisher Associates	10/02/20	Open
Final Plan Decision	Lawley/Fisher Associates	Decision for 2021 employee benefits finalized & information sent to Paylocity	10/12/20	Open

Open Enrollment Strategy	Lawley/Fisher Associates	Discuss and plan OE meetings & materials needed-- <b><i>Virtual Open Enrollment Landing Page</i></b>	10/12/20	Open
Open Enrollment Meetings	Lawley/Fisher Associates	Conduct Employee Meetings (in person or virtual utilizing <b><i>Lawley's virtual capabilities</i></b> )	11/2/2020 - 11/6/20	Open
Benefits Renew	Lawley	All plans renew	01/01/21	Open