

2021 Tampa Bay ISCEBS Board Monthly Call: February

Date: February 4, 2021

Time: 9:00am – 9:59am

Attendees: Anthony Donatelli, Tracy Fennell, Scot Grooms, Steve Hall, Paula Krupa, Dave Lohrey, Rebecca Witherow

Purpose: Monthly Chapter Board call

Discussion topics:

New grad outreach

- Jennifer, Anthony and Steve had a call 2/3/21 to discuss outreach strategy.
- Coordinating with Hannah at Society to use any email template available to begin an initial general email outreach.
- Related to Fundamentals planning, we can reach out to these folks with survey to gauge interest and timing.

Webinar Coalition – updates via Tracy

- Working on a graphic to incorporate all chapters and streamline communication.
- Coalition to create a LinkedIn page to help streamline communications with all chapters nationwide.

Educational Programs/Schedule

- Panel discussion set on FSAs and new special rules
 - February 11 from 11:45pm to 1:00pm with 8 signed up so far (exl board)
 - Flexible Spending Account special flexibility options for employers through the Consolidated Appropriations Act of 2021
 - Nicolette Rios (Northcoast Administrators) and Derek Ashton (Medcom) on panel and Dave to moderate/facilitate (planning call 2/9)
 - Questions – please share ideas with group next many days and we will gather some from panelists as well.
- Future programs
 - did not discuss, but let's come prepared in March mtg for topics
 - Legislative update in connection with new President/Congress (idea from last month)

Fundamentals Program

- Discussed an in-person program and timing varied from late summer to later in the year – November/December.
- Agreed two days vs one preferred and lengthy break time in between sessions
- Scot to provide survey results from last fall and board to discuss releasing another focused survey to gauge interest and timing.
- Paula to see if Society can build in interest survey during 2/11 panel discussion.
- Content start – Mercer-based deck Dave shared last year that has most of the pieces, but excludes retirement plans.

Miscellaneous

- Anthony to inquire with the state (“best government money could buy”) about CE qualification for CEBS