

## ***Tampa ISCEBS Board 2020 –March 2020 monthly call***

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**Date:** March 5, 2020

**Time:** 9:00 am-9:40 am

**Attendees:** In attendance (via phone conference): Dave Lohrey, Michelle Padgett, Paula Krupa, Ron Krupa, Scot Grooms, Anthony Donatelli, Rebecca Witherow

**Purpose:** Monthly chapter Board call

### **Discussion topics:**

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- **Discussion of Health & Welfare Benefits Fundamental Presentation Program and Agenda:** Program to be held in at the end of May to best accommodate recent graduates. Course will be a full day, with half day programs (split by a lunch) dedicated to Retirement Planning (401k) and Health & Welfare Benefits (Benefits 101), respectively. The room will hold up to 60 people.

Ron prepared an outline on the curriculum/topics, which was reviewed and was determined to be overall comprehensive and is intentionally set to be more basic-Benefits 101- intended to catch (or refresh) people who are newer to benefits. Because the two sessions will be split by the concept of a bridge-lunch (with a high-level connection between the two and opportunities to network), it was decided that registrants may register and attend either both (with a discount) or 1 of the sessions. The Board also hopes to obtain some future topics that may result from the “parking lot” of questions.

Michelle has received a CEBS Compliance “kit” that contains buttons, certificates of attendance, etc. We will need to have the Certificates of Attendance prepared for the Program registrants. Board discussed the challenge in obtaining FL Insurance CE credit, however the Program will be eligible for CEBS Compliance credit; may still be able to pursue SHRM or HRCI credit.

Julie with the Foundation will send another reminder/info email on Monday, 3/9. Scot and Ron have also posted the Program invite on LinkedIn; the Board is encouraged to send the invite to all applicable business professional contacts.

- **Chapter Webinar Coalition:** Michelle has spoken to Tracy Fennell, Chapter member and recent CEBS graduate. Tracy is very interested in representing the Group Chapters in this position. More information to follow.
- **Next Chapter meeting March 12-** located at Maggiano's at 4:30 pm-till--. Dan Ross of Med-Vision, Jeff Gasser of DeerWalk are able to the topic of: Self-Insured Health Plan? A Risky Business Without Claim Data Analytics. As of March 4, 20 people have registered (including Board members).. The Board has not yet viewed the presentation deck, which has been out together by DeerWalk. Scot will forward it to the Board when he receives next week.