

Tampa ISCEBS Board 2020 –May 2020 monthly call

Date: May 7, 2020

Time: 9:00 am-9:32 am

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

Purpose: Monthly chapter Board call

Discussion topics:

Discussion of Health & Welfare Benefits Fundamental Presentation Program and Agenda:

In light of COVID-19, discussed alternatives for hosting the Fundamentals Program, as opposed to delaying until Fall or beyond:

- Option to host a ZOOM Fundamentals
 - Target audience is new career/new workforce entrants.
 - To increase virtual engagement, we would limit session times (shorter increments of time-example 8:30a-12:30p), have engaging speakers, with interactive breakout (social/networking) times.
- Next action steps: Mercer and WTW will check- in with respective companies regarding support for benefits (Fundamentals) 101. Paula will begin Survey Monkey question creation so we may best prepare topics, agenda topics and estimate attendance.

Chapter Zoom call/ISCEBS list:

Chapter leaders' community have been floating ideas for contacts as we, collectively, have had to postpone major fundraising and/or networking events. Additionally, ISCEBS has provided lists of people that signed up for a test

- Next action steps: Paula will reach out to those on the ISCEBS lists that signed up for a test (8 people on the March list). Paula will check-in and see how they are doing with studying (challenges?) and share excitement with them in regards to pursuing their designation. She will share what we are doing in regards to the Fundamentals Program. Additionally, she will also introduce the idea of Chapter Zoom Call(s) and thus gauge interests in a Chapter Zoom

Call (Happy Hour format) that would include the introductions of board members, info about the coalition, and any other additional, relevant topics.

990-N filing form

- confirmed with Scot Grooms it has been completed.

Webinar Coalition Update

- Next action steps: Paula will reach out to Tracy Fennell and provide a brief update on the coalition, including upcoming webinars, and the date when Tampa needs to present.