

Quarterly Breakfast Meeting Review

Date: August 4, 2004

Place: Italian Community Center

Topic: Innovations in employees benefits programs

Speakers:

Michael Gotzler, General Counsel

Eric Parker, Executive Director, Wisconsin Regional Training Partnership

Steven Reinhold, Financial Services Associate

Summary: Nearly 30 people participated in this two-hour quarterly breakfast meeting. The presentation focused on the use of PEOs (Professional Employer Organizations) within employee benefits programs. As Michael Gotzler introduced, a PEO provides integrated services to effectively manage critical human resource responsibilities and employer risks for clients. PEOs enable clients to outsource the management of human resources, employee benefits, payroll and workers' compensation. This allows the PEO client to concentrate on the operational and revenue-producing side of its operations. This type of arrangement also allows the employees of the client organization to enroll in larger benefit plans that may not otherwise be available to the PEO client.

Eric Parker presented the business plan of Wisconsin Regional Training Partnership to arrange financing for a PEO to provide access to an affordable health insurance plan to an affordable health insurance plan to home care and child care providers. The PEO could make affordable health insurance available to UEDA members.

Steven Reinhold shared his experience in the small business community focusing on the insurance and brokerage needs of the non-profit community, including investment opportunities of retirement plans.

Evaluation:

We received 16 completed evaluation forms from this meeting. Considering the total number of member participants is 17, the response rate is 94.1%. The comprehensive evaluation data are as follows:

► **Eric Parker: Excellent 6.25%, Good 50%, Fair 31.25%, Poor 6.25%, N/A 6.25%.**

1. Could really be selling feature for business assistance to small business especially the wage credit paperwork.
2. Worth hearing more about.
3. Info good, presentation style was somewhat monotonous and difficult to follow.
4. Very good info. I would like to have more details, including cost to organization.
5. Helpful info.

▶ **Mike Gotzler: Excellent 43.75%, Good 56.25%.**

1. Nice, clear explanation on PEO. Wish we could afford one.
2. Limited presentation.
3. Could have spent the whole time on this subject alone.
4. Something we might be interested in learning more about.
5. Excellent information—I definitely will work to follow up in this concept.
6. Clear, simplified explanation of a complex subject
7. Gave great info; intrigued my interest.
8. Helpful—good information, open to questions.
9. The best speaker & host informational
10. Very informative & knowledgeable to the topic

▶ **Steven Reinhold: Excellent 6.25%, Good 56.25%, Fair 31.25%, Poor 6.25%.**

1. Somehow this topic didn't seem to do with the PEO topic.
2. Very informative. Would like to know about investment opportunities for retirement plans.
3. Not a particularly clear presentation on benefits of group collectively participating. Was he selling or informing?
4. Very good—would like to have more info about business planning activities; would have liked more examples of investment tools for nonprofits with few assets.
5. Not always able to hear.

▶ **Feedback to Questions:**

1. Is a PEO health insurance product something you would like UEDA to make available to its members?
Yes 68.75% N/A (Possibility) 37.5%
2. Did the panel expose you to new ideas and ways for managing human resources?
Yes 93.75% N/A (Possibility) 12.5%
3. Is access to human resource management professionals something that you think UEDA could assist with?
Yes 56.25% N/A (Possibility) 50%
4. Do you want additional training on employee benefits issues?
Yes 81.25% N/A (Possibility) 25%

▶ **Additional comments**

1. Though I am not the decision-maker, the concept is quite clear to me. The challenge (for my organization at least) is to control the few affords for everything payroll at minimum.
2. Would be great to include small businesses with 10-5 employees in opportunity to participate.
3. Could UEDA be the umbrella partner with PEO? (Economies of scale)

Appendix: Preference for Follow Up

Preference for Follow Up

| NAME | ORGANIZATION | PHONE | OPTION | CONCERNS |
|--------------------|--------------------------------------|----------|---------------------------------|--|
| Julia O'Connor | Midtown Neighborhood Association | 342-6656 | Follow up | Eric: healthcare plan participation |
| Mark Konkel | Holy Redeemer | 466-1800 | a sales call from the panelists | |
| Dennis Barrish | West End Development Corp. | | Follow up | Eric + Mike |
| Sally Alefsen | Neighborhood Housing Services | 344-3013 | Follow up | Being able to contact local organizations who have PEO in place. |
| ReDonna Rodgers | Center for Teaching Entrepreneurship | | Follow-up | Mike |
| Roslyn Washington | Metcalf Park Residents Association | | Follow up | More information on the PEO concept |
| Robert Plevin | North Avenue CDC | 871-4793 | | |
| Helen Hermus | Layton Boulevard West Neighbors | | | |
| Alice Schmatzhagen | WWBIC | | | |
| Johnny Moutry | New Covenant Housing Corp. | | | |