



November 2001

[www.webnetwork.org](http://www.webnetwork.org)

# WEBbits

## INSIDE THIS ISSUE . . .

- ◆ WEB president meets with IRS and DOL
- ◆ Volunteer efforts build WEB's momentum
- ◆ Local leadership information to enhance participation
- ◆ Two more experts join Whistle Stop program
- ◆ Nominations open for 2002-04 National Board elections
- ◆ WEB discount for PBMI conference
- ◆ Around WEB Network--*Keeping connected*



### WEB leaders to meet in Dallas

- ◆ National Board Meeting  
January 18-19, 2002
- ◆ Chapter Presidents' Meeting  
January 19-20, 2002

*Some 80 guests attended a kick-off luncheon in Worcester, MA, September 28 to learn about the benefits of starting a WEB Chapter. Under the leadership of Robin Lazarow, a benefits attorney with Mirick, O'Connell, Demallie, & Lougee, LLP, luncheon sponsor, and Nancy Kinirons, New Chapter Development Chair, this energetic Massachusetts Metrowest group is working hard to become WEB's 25th chapter.*

## WEB's president meets with IRS and DOL

Cindy Van Bogaert (Boardman Law Firm), WEB president, met recently with IRS and DOL officials to encourage their organizations' participation in WEB both as members and speakers. Both agencies expressed interest in pursuing such goals.

Cindy also met with steering committee members from WEB's Baltimore, Northern Virginia, and Washington, D.C. chapters at an ARAG-sponsored luncheon. (Thank you ARAG!) "The meeting really offered a unique opportunity for members from chapters in close proximity to get together and share ideas with one another and the national organization. I really appreciate the members taking their time to meet with me," said Cindy. Those meeting with Cindy included: Charles Connolly (Zurich North America), Kathy Davis (McLean Koehler Sparks Hammond), and Lisa Hall (Spectera) of Baltimore; David Downer (Segal) and Todd Ruopp (ARAG) of Northern Virginia; and Vicki Dungan (Dungan Resource Group), Mary Ann Dunleavy (Buck Consultants), Ken Robbett (Robbett & Robbett LLC), and Linda Shore (Silverstein & Mullens) of Washington.

Among other items, members suggested that a steering committee member from each chapter could be dedicated to providing local chapter news for the website. Cindy encouraged the addition of such information as honors, awards, promotions, and job changes as a way of keeping members

informed, connected, and networked. Chapter representatives also expressed a desire for more member discounts.

Cindy and Ken Robbett (Robbett & Robbett), WEB secretary, also met with leaders of other national benefits groups to learn about their organizations in general and the challenges they face. Among the organizations represented were The American College, American Academy of Actuaries, ASPA, Conference of Consulting Actuaries, Financial Planning Association, International Foundation of Employee Benefit Plans, National Institute of Pension Administrators, and the Western Pension & Benefits Conference.

"This initial meeting made it clear that there is much overlap among the organizations, particularly in the area of education," Cindy said. "There is likely to be another meeting of these organizations to pursue common interests." Cindy indicated that WEB is particularly interested in discussing discounts for WEB members who participate in the programs these other organizations offer.

### President's Korner . . . Thoughts from Cindy **Volunteers' efforts build WEB's momentum**

On behalf of WEB, I welcome our members in the Massachusetts MetroWest area. You are close to numbering 25 members. . .and fast on your way to becoming our 25<sup>th</sup> chapter! I believe that you will find WEB an excellent source of employee benefit information and networking opportunities that will enhance your career development.

One of the exciting things about WEB results from the myriad contributions of our volunteers. One example is MetroWest. Nancy Kinirons (Lufthansa Airlines), New Chapter Development Chair, teamed up with Robin Lazarow (Mirick, O'Connell, Demallie & Lougee, LLP), a former National Board member, to interest employee benefits specialists, human resources generalists, and related program service providers in WEB. Through their hard work, the chapter has an excellent steering committee whose efforts will add to the chapter's early momentum. And, there is growing interest in other areas to form new chapters. *Keep up the good work, Nancy and Robin!*

The National Board is updating policies and procedures to reflect our new fax and website communication capabilities. I commend Kathy Wall, Communications Chair (independent communication consultant), Candace Kessel, website/publications editor (Kessel Communications), and our staff who are seeking ways to improve the efficiency and accuracy of the communications process.

On January 18-19, 2002, the National Board will meet in Dallas, TX, followed by a Chapter Presidents' Meeting on January 19-20. Linda Ellis (UICI), immediate past president of the Dallas Chapter, is chairing the hardworking committee that is making all arrangements. The Board will be discussing opportunities for increasing WEB's efficiency, especially in communication and chapter services. The Board will also be in attendance at the Chapter Presidents' Meeting, which will offer ample opportunity to discuss ways to turn the challenges of chapter operations into

growth opportunities. The Board is looking forward to an open and vigorous exchange of ideas regarding how WEB can better serve members.

Chapter Presidents are encouraged to bring at least **one additional officer** to the Presidents' Meeting. Within the next few weeks, you will be hearing more about the meeting so that you can make early flight and hotel reservations to take advantage of the lower airline rates available at this time.

I would like to thank the many hardworking national and local steering committee members for their efforts. You are the strength of WEB.

Cindy Van Bogaert, *WEB National President* (Boardman Law Firm)

### MembershipKorner . . . Thoughts from Bev

#### Local leadership information to enhance participation

Effective November 2001, monthly reports will resume in EXCEL. The membership reports will be sent via email between the 15<sup>th</sup> and 20<sup>th</sup> working day of each month to chapter steering committee members. They will provide local leadership information to enhance participation in area WEB activities. The EXCEL-only format will enable membership chairs to customize their reports for their own purposes. Monthly reports will include information on new members, current members, non-renewing members, and prospective members.

I encourage each chapter to review the reports, routinely update the prospect list, and fully utilize the information contained in the reports. For instance:

- ◆ Welcome and acknowledge new members at your meetings;
- ◆ Make it a practice to recognize long-term WEB members at milestone anniversaries;
- ◆ Provide personal follow-up with non-renewing members who may not have renewed their membership; and
- ◆ Survey members and prospects about topics of interest and convenient meeting locations.

If members have relocated outside the chapter area, WEB hopes that they will advise the national office of new contact information. "We want very much to keep our members involved. WEB provides valuable employee benefits information and networking opportunities," said Bev. "If a member is going to an area in which a new WEB Chapter can be developed, we want to help in any way possible."

Bev Putnam, *National Membership Chair* (William M. Mercer)

## ProgramKorner . . .Thoughts from Elaine

### Two more experts join Whistle Stop speakers program

Two new Whistle Stop speakers, Randy Light and Cynthia Marcotte Stamer, are available to share their expertise with WEB chapters. Whistle Stop speakers are available on a cost-sharing basis (National pays 50% and local chapters, 50%).

Randy, managing partner of BMI Audit Services, South Bend, IN, is a noted technical expert in the areas of health and welfare benefits plan design, underwriting review, contract review, analysis of funding techniques, and regulatory compliance. Cynthia, a partner at Andrews & Kurth LLP, Dallas, TX, is nationally recognized for her publications and knowledge regarding human resources matters.

Randy's topic, *Are you letting healthcare dollars slip through the cracks*, reviews the underlying necessity for auditing self-insured healthcare plans, including fiduciary oversight, cost-containment motives, and the assurance of the accuracy of ongoing claims payment. Prior to founding BMI Audit Services, Randy led the group benefits consulting practice for Crowe Chizek & Company LLP, the nation's eighth largest accounting and consulting firm. He is a faculty member in the Continuing Education Division of Indiana University South Bend and a frequent speaker on employee benefit topics. To schedule Randy, contact Will Baker (also of BMI) at 219.234.3870 or [wbaker@bmiaudit.com](mailto:wbaker@bmiaudit.com).

Cynthia regularly advises employers about strategies for reducing employee benefit and employment liability exposures and achieving business objectives. Her presentations will update members on the latest legal developments affecting health plans and provide tips for coping with new health plan responsibilities and liabilities. She can focus on three topics:

- (1) *Employee Communications--Latest buzz on requirements, risks and opportunities;*
- (2) *When your employee's private life becomes your business;* and
- (3) *Health plans in the hot seat--compliance update.*

To schedule Cynthia, contact her directly at 214.659.4685 or [cindystamer@akllp.com](mailto:cindystamer@akllp.com).

More information on other Whistle Stop speakers and their topics is available at [webnetwork.org/members/whistlestop.htm](http://webnetwork.org/members/whistlestop.htm). *This is a member benefit you don't want to miss!*

Elaine Morrow, *National Program Chair* (Lonestar Communications)

### Nomination process readies for 2002 National Board election

WEB's nomination process is open and nominations are being accepted for six national board positions: President, Secretary, Regional Vice President-Eastern, New Chapter Development Chair, Communications Chair, and Fundraising Chair (new position). The positions are for two years and begin July 1, 2002.

Serving on the Nominations Committee are current national board members Gay Shamro (Kaman Corp.), Regional VP-Eastern; Mike Lemmenes (LaSalle Bank), Director at Large-Midwest; Linda

Ellis (UICI), immediate past-president, Dallas Chapter, and Mary Ann Dunleavy (Buck Consultants), president, Washington DC chapter. Terri Brennan (Greensfelder Hamker & Gale PC), former Regional VP-Midwest, is serving as acting chair of the Nominations Committee.

Members interested in applying and/or nominating a member for any of these positions may email names and a brief description of the prospect's WEB involvement at the local and/or national level to Terri at [tab@greensfelder.com](mailto:tab@greensfelder.com) or contact her with questions about any board position. Watch for more information about the upcoming elections in future *WEBbits* and on the website at [www.webnetwork.org](http://www.webnetwork.org).

## WEB endorses PBMI Conference coming April 24, 2002

WEB has endorsed the upcoming Prescription Drug Utilization Management Conference April 24-26, 2002, in Scottsdale, AZ. WEB members will receive a \$100 registration discount.

Sponsored by PBMI, an independent research and consulting organization that helps industry professionals purchase and use pharmacy benefit management services cost effectively, the annual educational conference showcases the industry's best research-based findings, trends and strategies for managing prescription drug utilization. PBMI recently published its annual Benefit Design Survey Report, sponsored by Takeda and Lilly. More information about PBMI's conference and services is available at [www.pbmi.com](http://www.pbmi.com).

Highlights of the April conference include:

- ◆ Utilization Trend Analysis
- ◆ Biotech Trends and Managing High-Cost Injectables
- ◆ Quarterly and Annual Check Up: Monitoring Your Prescription Plan Performance
- ◆ Case Study: Plan Design Communication Strategies
- ◆ HIPAA Privacy Regulations: What's an Employer to do?
- ◆ Issues Facing the PBM Industry: A Legal Perspective.

## Around the WEB Network--*Keeping connected*

◆ *Regional VPs note organization's activity*

Kathy Lazar (TRW Inc.), Regional VP-Midwest, reports that one of her responsibilities has been to chair a taskforce focused on ensuring the continued vitality of WEB chapters. The taskforce created a Chapter Assessment Tool, a worksheet that will assist chapters in assessing their strengths and determine improvement opportunities. The Chapter Assessment Tool will be presented at the Presidents' meeting in January.

Speaking of ensuring a chapter's vitality, strong chapters have developed succession-planning strategies, including preparing job descriptions for the chapter's officers. The Madison chapter recently published officer job descriptions that can be used as guides for any chapter that is looking to do this. Contact Madison's president, Marina Edwards (Davis, Conder, Enderle & Sloan) at [marinaedwards@msn.com](mailto:marinaedwards@msn.com) to get a copy.

Joanne Swerdlin (Swerdlin & Co.), Regional VP-Southern, notes that the south is doing well, overall. Chapter steering committees are doing a great job, and membership and meeting attendance numbers are holding steady.

◆ *Website usage increases*

Figures indicate that members are increasingly using our website for meeting registration and information. Usage grew from 54,466 hits in September to 70,390 hits in October.

"Our goal is to have the website become the organization's major source of chapter and national information and resources," said Kathryn Wall, national communications chair. We need your help to "grow" the chapters' news sections. Send your news and/or information in a Word document to Candy Kessel, website editor, at [ckessel@bellatlantic.net](mailto:ckessel@bellatlantic.net) or contact her at 202.363.0478. Photos of a WEB event that chapters wish to share with the membership are also welcome. Please email them to Candy in a jpeg format.

◆ *Need a job? Looking for an employee?*

If you're thinking about changing jobs or looking for qualified employees, check out the resources available on the Job Bank at [webnetwork.org/jobs.htm](http://webnetwork.org/jobs.htm). Members seeking a position are encouraged to enter their own resume information on line at the same address at no cost.

◆ *Bulletin Board--a safe place to ask questions*

Looking for an answer to a benefit question or need an opinion on a specific benefit issue? Why not post your query on our *Bulletin Board* at [webnetwork.org/members/board/htm](http://webnetwork.org/members/board/htm). Utilize this resource on our website to find out what you need to know from a plethora of benefits experts in our membership.

◆ *Does WEB have your email address?*

As WEB continues to rely more heavily on electronic communications, make sure your email address is current so you don't miss important meeting information and the latest happenings within WEB. Log on to [webnetwork.org](http://webnetwork.org) and click on the Members Only section to make sure your personal listing in the database is complete and accurate and includes your email address. Or, email your email address--especially if you change jobs--to [web@execpc.com](mailto:web@execpc.com).

◆ *New Chapter Development remains healthy*

Nancy Kinirons, New Chapter Development Chair, reports that the MetroWest chapter has gotten off to a great start (see related article and pictures on our website at [www.webnetwork.org](http://www.webnetwork.org)). If you know of anyone in the Massachusetts area, please forward names to Robin Lazarow, chapter president, at [rslazarow@modl.com](mailto:rslazarow@modl.com). She'll make sure they're invited to an upcoming meeting.

◆ *Looking for good ideas for great meetings*

WEB is always interested in knowing about great ideas that worked, whether it was a chapter meeting, a sponsorship idea, or a chapter membership strategy. Please share these best practices with either Nancy Kinirons at [nancykinirons@altavista.com](mailto:nancykinirons@altavista.com) or Robin Lazarow at [rslazarow@modl.com](mailto:rslazarow@modl.com) so that your "ideas that work" can be shared with other chapters.



**National Sponsors**  
WEB thanks the generosity of Boardman Law Firm, a current Bronze Sponsor. Boardman Law Firm is a full-service law firm with a strong employee benefits practice area. Learn more about them at [webnetwork.org/nationalsponsors.htm](http://webnetwork.org/nationalsponsors.htm)

WEB \* PO Box 128 \* Brookfield WI 53008 \* 262.821.9080  
FAX 262.821.1275 \* [web@execpc.com](mailto:web@execpc.com) \* [www.webnetwork.org](http://www.webnetwork.org)

#####