



riskinternational

CASE STUDY

\$984K

FIRST YEAR
SAVINGS

9 MONTHS

SPEED OF CAPTURE

INDUSTRY

NON-PROFIT

EMPLOYEES

1,250

LOCATION

GEORGIA

NON-PROFIT AND CHARITABLE ORGANIZATION

ENGAGEMENT

- Population demographics and plan cost resulting in low plan participation.
- Health plan participants experienced significant financial risk.
- Year-over-year cost increases in the benefit plans creating a top three organizational line-item expense.
- Brokerage partner had not been historically aligned with firm's philosophy and mission; scope was undefined, and agreement included unfavorable fees, expenses, and terms.
- Deployed Check 173 diagnostic to evaluate efficacy of benefit suppliers and networks, identify excess plan expenses and shortfalls, and structure ongoing governance oversight and plan management.

RESULTS

- Restructured and executed protocols for benefit sourcing, including all viable supplier and plan structure arrangements; competitive market tension with fiduciary oversight created an immediate positive outcome with incumbent vendors.
- Renegotiated brokerage scope and compensation to an appropriate, fixed-fee arrangement; realigned incentives with client's organizational goals as opposed to broker's sales quotas.
- Better positioned employees to be able to take advantage of government-subsidized health plan opportunities.
- Improved overall cost structure and financial arrangements to market-competitive standards, realigning risk exposure with client's risk tolerance.

REDUCE RISK | REALIZE REWARD

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