**MN Self-Funded User Group Knowledge Base: Self-Funding Road Map**

<table>
<thead>
<tr>
<th>The Road to Self-Funding</th>
<th>The First Year</th>
<th>The Second Year</th>
<th>Years Three and Beyond</th>
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<tbody>
<tr>
<td>START NOW</td>
<td>Implementing and learning to manage your Self-Funded Program.</td>
<td>Becoming Owners and Stewards of &quot;Our Plan&quot;.</td>
<td>Managing Our Plan for continuous improvement.</td>
</tr>
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**Our "User Group" is a unique resource in Minnesota bringing together Business & HR Administrators and Labor Leaders with the shared purpose of health plan improvement**

(Since 2011, one or more of these topics are explored in-depth in peer-to-peer discussion at each of our Group’s monthly meetings)

### Starting out "On the Road"
- a) Leader-champion
- b) Courage to change
- c) Catalyst event
- d) Including employee group leaders
- e) Acquire knowledge
- f) Build confidence

### Engaging Self-Funding-Experienced Brokers-Consultants
- a) Requesting proposals [Broker-Consultant Management Guide]
- b) Evaluating proposals
- c) Selection and Contracting
- d) Annual broker-consultant performance evaluation

### Plan Design
- a) Peer-to-peer knowledge-building
- b) Working with stakeholders

### Employee Education
- a) Partnering with Employee Groups

### Estimating and Comparing Cost Savings
- a) What data should be analyzed?
- b) Does your District have access to your data?
- c) Is your data accurate?

### Advisors: Selection, Evaluation and Management
- a) Broker/Consultant Experience
- b) Managing Brokers/Consultants
- c) Responsibilities, Functions and Roles

### Communications
- a) Identifying Stakeholders
- b) Communications planning
- c) Stakeholder education

### Management Responsibility and Structure
- a) Insurance committee
- b) Cabinet
- c) School Board

### Financial
- a) Reserve management
- b) Asset management
- c) Stop Loss / Reporting

### Other Key Issues
- a) Setting Premiums for Self-Funded Plans
- b) Networks
- c) Wellness/Health Promotion
- d) Legislative Awareness