

# Lockton Community Health Practice

Lockton’s team of healthcare consultants have deep experience working with some of the largest health systems and managed care plans in the country. Our primary objective is to become a strategic partner to our clients by staying immersed in all aspects of the healthcare industry. Over the past 5 years, we have taken our healthcare expertise and built a platform that is specifically designed for large, organizationally complex Community Health Centers that are ready to implement smart business solutions that historically have only been accessible to the largest players in the healthcare industry.



### LOCKTON CARES

- For more than 50 years, Lockton Associates have given back to their local communities, not because we have to, but because we want to.
- We believe this commitment to social responsibility builds stronger families, better professional relationships, and more committed Associates.
- In the past year, Lockton contributed more than \$5 million in sponsorships and charitable support to organizations around the world, including contributions to many Health Centers in celebration of National Health Center Week.

### HEALTH CENTER CONSULTING SERVICES

| Employee benefits                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Risk practices                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Retirement services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
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| <p>Attracting and retaining top talent are key to a Health Center’s ability to provide access to care and meet their mission. Lockton works with CHCs to structure health and welfare programs that help achieve workforce goals.</p> <ul style="list-style-type: none"><li>• Actuarial services</li><li>• Compensation</li><li>• Compliance services</li><li>• Data analytics</li><li>• Executive benefits</li><li>• Health Reform Advisory Practice</li><li>• HR technology</li><li>• Lockton Health Risk Solutions</li><li>• Pharmacy consulting</li><li>• Mergers and acquisitions</li><li>• Voluntary benefits</li><li>• Population Health Management</li><li>• Outsourced HR</li><li>• Benchmarking</li><li>• Communications</li></ul> | <p>We are committed to delivering expert risk advice to help CHCs become more successful. By providing Health Centers with the best risk management strategies, we allow them to remain focused on expanding into new service areas and client programming.</p> <ul style="list-style-type: none"><li>• FTCA Wrap Around</li><li>• Workers’ Compensation</li><li>• Captives</li><li>• Analytics</li><li>• Property and casualty insurance</li><li>• Professional indemnity</li><li>• Executive risk</li><li>• Cyber risk</li><li>• Surety</li><li>• Environmental</li><li>• Risk finance</li><li>• Claims consulting and risk control services</li></ul> | <p>Successful wealth benefits help employees stay focused professionally and form a cornerstone of effective workforce management. Lockton advises CHCs on how to protect themselves from fiduciary risk, create cost-efficient retirement plans and deliver positive employee results.</p> <ul style="list-style-type: none"><li>• Retirement strategy development</li><li>• Fiduciary oversight and governance</li><li>• Investment advice</li><li>• Defined contribution, defined benefit and executive benefits plan design</li><li>• Employee engagement</li><li>• Vendor management</li><li>• Executive benefits restoration</li></ul> |

### LOCKTON’S ADVANTAGE: BRINGING FORTUNE 500 INFRASTRUCTURE TO COMMUNITY HEALTH CENTERS

| WIRED FOR IMPACT                                                                                                                                                                                       | ROOM TO GROW                                                                                                                                                                                             | BUILDING FOR THE FUTURE                                                                                                                                          |
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| <p>WITH THE SPEED AT WHICH THE HEALTHCARE ENVIRONMENT CONTINUES TO CHANGE, we bring a data-driven approach to your business and share the “Power though People, Enabled by Technology” philosophy.</p> | <p>WITHOUT CONTRACTUAL HANDCUFFS, HIDDEN FEES, OR SALES TACTICS, we offer full transparency and a service guarantee of 100% at-risk fees. The only metric we focus on is your complete satisfaction.</p> | <p>STARTING WITH THE PLATINUM RULE, we help you build a foundation and multiyear strategic plan which aligns with your benefit goals and guiding principles.</p> |

### Lockton contacts



**Danny O’Neill, MPA**  
Healthcare Consultant  
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Danny O’Neill is a healthcare consultant and leads Lockton’s Community Health Practice. He is committed to providing the best service in the brokerage industry to his clients. He is responsible for client advocacy, team leadership, and overall account management. Prior to joining Lockton, Danny served as the CEO of Missouri Health+, an accountable care organization which included 24 Community Health Centers and their 750 employed providers. Prior to that, Danny spent 8 years lobbying for the Missouri Primary Care Association and National Association of Community Health Centers, where he represented the political and policy interests of Federally Qualified Health Centers, in Missouri’s Capitol and Washington, DC.



**Liz Spink, CIC, CISR, RN**  
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Practice Leader  
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As a Practice Leader within Lockton’s Healthcare Practice, Liz Spink is responsible for creating and strategically managing programs for both private and public large physician groups, healthcare systems, and senior living. The practice was developed over 20 years ago to best service our clients. During Liz’s tenure with Lockton, she has partnered with her clients to negotiate and structure insurance programs consistent with her client’s corporate objectives. She has broad experience in all lines of coverage, with a specific focus on professional liability placements. Professional liability program experience ranges from a traditional risk transfer approach to numerous variations of risk financing.



**Anthony Scott, SPHR, SHRM-SCP, CLU, REBC, RHU, GBA, ARM, MHP, CLMS, DIA, HCSA, DHP, HIA, PHIAS, DIF**  
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Anthony is an employee benefits expert with over 20 years of experience in the healthcare industry. He leads Lockton’s Healthcare Industry Benefits Practice where he focuses on large complex healthcare organizations. Some of his areas of expertise include benefits, absence management, human resource processes, change management, and healthcare group purchasing organizations (GPOs). Anthony and his team focus on helping clients identify and implement leading practices that position them to achieve their organizational and human resource objectives. This is in addition to the day-to-day support and becoming an extension of his clients’ HR teams.



Recent health center projects



Using a Total Rewards approach to understand the perceived value the employees of a large health center felt they were receiving from their salary, bonus, benefits, and PTO structure, Lockton redirected these resources to structure an incentive plan for providers that aligned with the Health Center’s managed care payment methodology. This resulted in higher overall employee satisfaction and stronger performance under managed care value-based arrangements. All of this was accomplished using existing dollars and required no new funding by the health center.



A large, rural Health Center engaged Lockton’s full service pharmacy consulting team to ensure that their PBM was adhering to their contract. Lockton’s claim reconciliation process revealed that specialty drugs were being identified incorrectly. Lockton served as an advocate for this Health Center with their PBM, leading to a payment of nearly \$215,000 for underperformance of contract guarantees.



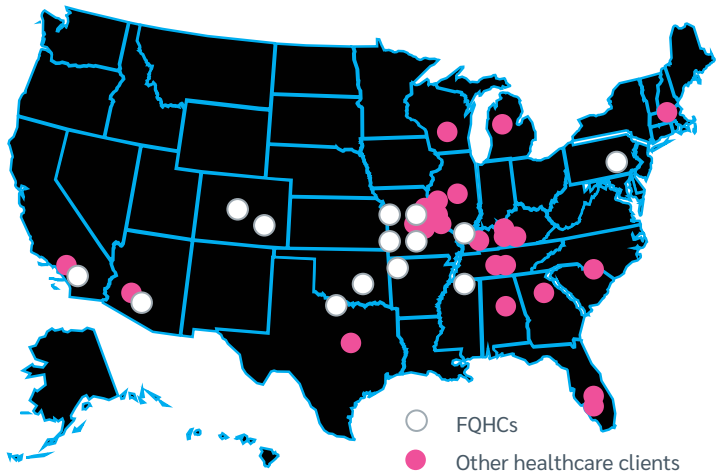
Our HR technology team worked with a growing health center to maximize the value of their HRIS by making their existing platform more efficient while improving the interface to make benefit selection a more streamlined and user-friendly experience. This resulted in a 35% increase in voluntary benefit purchase by employees, a leading indicator of strong employee retention.

Lockton Healthcare Practice

Dedicated global healthcare team with professionals positioned throughout the US, London, Bermuda, Singapore, and Australia. Our primary objective is to become a strategic partner to our clients; and to do so, we stay immersed in all aspects of the healthcare industry.

Sampling of current healthcare and Health Center clients

We serve clients in 41 US states, of which 34 are in major markets, providing innovative, integrated solutions in risk management, insurance, and employee benefits. Lockton is currently engaged by 18 large FQHCs across the country. These Health Centers employ over 11,000 healthcare workers and are serving over 660,000 low income, uninsured and underserved individuals each year.



The year reflects the start of the partnership with Lockton.

|                                                                 |                                                                |                                               |
|-----------------------------------------------------------------|----------------------------------------------------------------|-----------------------------------------------|
| Managed care plan<br>Boston, MA (2007)                          | Large health system<br>St. Louis, MO (2010)                    | Large health system<br>St. Louis, MO (2002)   |
| Public large behavioral health provider<br>Nashville, TN (2017) | Largest privately-held oncology group<br>Fort Myers, FL (2008) | Community hospital<br>Hopkinsville, KY (2014) |
| Multi-specialty practice<br>Nashville, TN (2020)                | Physician group<br>Alpharetta, GA (2009)                       | Urgent care provider<br>Phoenix, AZ (2016)    |
| Regional hospital system<br>Wisconsin (2019)                    | Hospital system<br>Quincy, IL (2020)                           | Managed care plan<br>Columbia, SC (2008)      |
| Managed care program<br>Irvine, CA (2015)                       |                                                                | Healthcare system<br>Hopkinsville, KY (2015)  |

The speed of change in today’s healthcare environment has led to pressure on the basic framework and understanding of traditional risk management. Health Centers must rethink their strategies and develop new approaches to dealing with an ever-increasing level of complexity and regulation.

About Lockton

