










The Strategic Plan is a tool to highlight the priorities of LAWCX, guide decision-making, and allocate resources. The Plan was developed to support the following three guiding principles for the organization:

1. **Stability:** *“To effectively and responsibly manage resources.”*
2. **Service:** *“To be member-focused and provide innovative solutions to promote effective and efficient workers’ compensation programs.”*
3. **Collaboration:** *“To be a sharing organization that fosters participation, transparency, and openness.”*

The Plan reflects the status of each initiative and will be amended, as necessary, to include new priorities the LAWCX Board identifies throughout the year. An update under the Comments/Status section will only be provided when new information is available or there is a change in status.

 No action or activity to date.	 Behind schedule or delayed.	 Preliminary action taken; target completion not yet certain.	 On target or completed.
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PROJECT/TASK	TARGETED COMPLETION	COMMENTS/STATUS/MILESTONES
1. Ensure stability in LAWCX’s financial position, pricing, and membership; streamline and improve the members’ experience when submitting renewal data and compliance surveys.		
a. Explore feasibility of forming a captive insurance company for alternative investment strategy and supporting risk financing objectives.	November 2021	
b. Evaluate modification to the investment policy to allow for longer duration investments.	November 2020	Completed. The Board approved longer duration investment as part of the review of the investment policy in November 2020. 
c. Explore the feasibility of using a loss portfolio transfer to sell off claims in LAWCX’s older program years.	July 1, 2021	This item is pending discussion on the development of a captive insurance company. 
d. Explore options available for buying-down the self-insured retention.	July 1, 2021	
e. Conduct in-person member visits, with priority given to those who have recently given notice of intent to withdraw from LAWCX.	July 1, 2022	City of Santa Maria – 10/15/2019 CCCSIF – 12/3/2020 PERMA – 1/12/2021 Staff has developed an updated presentation for use on virtual member meetings. Presentation is tailored to each member. 



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f. Complete implementation of online data collection tool for underwriting, compliance, and payroll data.	July 1, 2021	Staff is working with Ventiv to resolve the challenges faced by members and staff in prior years and to improve the overall survey experience. ●

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2. Develop programs to expand “internal marketing” efforts; increase member’s understanding of LAWCX and awareness of services and resources; and strengthen member engagement.		
a. Develop new LAWCX logo.	October – June 2021	Recommended logo design being presented to Board at the June 1, 2021 meeting. ●
b. Develop a New Representative orientation program and offer web-based sessions with all new Board or alternate representatives. Highlight importance of participation in LAWCX governance.	June 2022	●
c. Develop a Representative Refresher program and offer to all existing Board and alternate representatives via web-based delivery. Promote participation in committees to encourage succession planning.	December 2021	Updated member orientation presentation to be used in this effort. ○
d. Develop a series of presentations that provide easy to digest learning opportunities on specific topics in the areas of claims, risk control, and finance. Topics to include: i. Best practices when writing contracts for claims handling and bill review fees ii. Proactive claim settlements iii. Use of job analysis library iv. Selecting an appropriate self-insured retention v. Legislative updates	July 1, 2022	○
e. Include one learning opportunity at each board meeting.	June 2022	Postponed due to virtual meetings. ○



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f. Create a brochure of all services and resources available to members. Distribute to membership and post to LAWCX website. Include PRISM service offerings.	December 2021	A draft brochure has been created and is currently out for internal review and comment.
g. Develop a rolling activity summary to increase transparency and highlight staff and member activities throughout the year.	October - December, 2019	Included in each EC and BD agenda

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3. Develop risk control programs and services to prevent and mitigate the probability of recurring injuries and illnesses.		
a. Conduct root cause investigation training for a focused group of members.	July - September, 2020	Training took place during the 2019/20 program year, and will continue as part of the Risk Control Work Plan for 2020/21
b. Develop root cause investigation training for web delivery.	December 2020	Will be part of the Risk Control work plan for the 2020/21 program year.
c. Develop a New Representative Risk Control orientation for delivery to all new Board and alternate representatives.	June 2021	Will be part of the Risk Control work plan for the 2020/21 program year.