

## CHARTERSHIELD TRUST CASE STUDY

### AT A GLANCE >

**Client:** Community Collaborative, K-12 school based in San Diego, CA

**Situation:** Community Collaborative was expanding from one campus to four and needed a desirable, yet cost-effective benefits package for their expanding profile.

**Outcome:** Community Collaborative joined the CharterShield Trust, saving them approximately \$180,000 per year compared to the direct market or offers from alternative brokers.

### THE CHALLENGE

Community Collaborative started as a Marsh & McLennan Agency (MMA) client with only seven employees. In 2015, they decided to grow and change their model by evolving into a new entity. Suddenly they had over 150 employees and were absorbing three new schools, each with very different objectives when it came to an employee benefits package. The first school really cared about the richness of the benefits offered. The second school was concerned with the cost of the benefits that fell on their employees. And, the third school sought to match what their former district offered. Encompassing these various goals under one solution meant that we really had to hone the message of how the CharterShield Trust would be able to deliver on all fronts.

### OUR SOLUTION

MMA's CharterShield Trust is an employee benefits program created in partnership with the Charter Schools Development Center as a way for Charter Schools to offer the same best in class benefits to their staff that a school district would provide but at a significant discount. By joining the Trust, Community Collaborative would be able to meet the needs of each school, while also simplifying their administrative processes with the use of an online enrollment platform to administer their benefits program.

### OUTSTANDING RESULTS

Community Collaborative has continued to renew with the Trust and they have shared much appreciation for the outstanding service and diverse benefits provided. In addition to their \$180,000 savings, they have exceeding confidence in referring their staff to MMA for any service or claim issue. Since first enrolling in the Trust, Community Collaborative has continued to grow and add new campuses increasing their need for MMA's benefits program and expertise. Community Collaborative has remained a loyal client due to the professional relationships formed, exceptional plans offered, and of course, the competitive rates the CharterShield Trust offers!

