

# Dori Penagis

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Highly motivated, accomplished benefits professional re-entering the compensating workforce after 16 years raising my family. I am interested in returning to a Health Care Benefits role where I can use my many years of previous experience, communication, and leadership skills to bring additional success to a company. In addition, I have strong written and verbal skills which are critical when working with clients, vendors, and fellow colleagues.

Greatest personal and professional strengths include building relationships and partnering with clients, colleagues, and vendors. Skilled in consulting and project management for medium and large clients. Approximately, 16 years of professional experience working in human resources, and health care benefits, specifically, in areas of strategy, analysis, planning, design, implementation and administration. Strong work ethic, desire to learn and grow, and to exceed my customer's expectations.

## Work History

### Benefits Counselor – Open Enrollment 2021

Aon LLC

#### September 2020 – November 2020

- Worked as a seasonal Benefits Counselor with multiple clients – JBS/PPC, Bridgestone and Budweiser; learned Benefit Designs and requirements for each
- Trained and worked collaboratively with several virtual teams and enrollment managers using Zoom, Webex and Slack assuring superior communications which enabled the highest level of quality service to the client's employees
- Counseled employees through phone calls and video calls
- Discussed new and existing benefits, answered questions, and completed open enrollment for the 2021 plan year
- Discussed voluntary benefits with each employee, answered questions and discussed the value of these options as it related to their financial wellness
- Used Multiple benefit administration systems – BenefitSolver, MUE U2X, NICE/InContact – Max Agent, VBES SharePoint, MyUnivers, Aon Avenue,
- Also learned and worked with many systems within Aon, such as Workday, UPoint, RIVS, and Microsoft Teams

**Health Care Benefits Client Manager**  
**WageWorks (FlexBen)**  
**October 2003 – December 2004**

- Served as consultant to numerous clients collaborating across different healthcare benefit plans
  - Consulted on benefit design – analyzed and redesigned benefit plans for cost savings, reviewed legal requirements and worked to increase employee satisfaction
  - Designed and distributed communications for new benefits, open enrollment, and special programs
  - Provided client HR staff support on benefit administration and communications
- Reported to corporate client teams on Flexible Benefit Plans, Open Enrollment, Healthcare Cost Analysis and communication strategies
- Worked across multiple internal teams to provide the highest quality support for each client's success
- Worked with various vendors to support each client team

**Senior Health Care Consultant**  
**Hewitt Associates LLC**  
**April 1997 – October 2003**

*Client lead and project management roles*

- Worked as primary Health Management contact for multiple large clients. Consulted in a variety of health care areas including, strategy development, benefit design, plan evaluation and selection, corporate contribution strategy, communications, and administration
- Developed and delivered presentation material for new and existing clients on new products, market trends and cost evaluations using large scale analytics. Reports and presentations developed and presented on an as needed basis focused on expectations and client needs
- Spearheaded bid for Long Term Care insurance for the Health Management practice
- Performed national and local health care, prescription drug, mental health/substance abuse, life, disability, and paid-time-off bid projects (RFPs). Compiled results, summarized findings in client reports and presentations, made recommendations and assisted with client decision making
- Implemented health and welfare programs/benefits for multiple clients
- Updated client Human Resources contacts with information of interest, news, trends, and compliance requirements

- Project management skills included planning, resourcing, and progress tracking
- Developed and maintained numerous vendor contacts for multiple clients
- Assisted in negotiations for annual Health Maintenance Organizations rates
- Worked collaboratively with internal teams to develop the best product/strategy/response for our clients

*Coached and mentor relationships with junior consultants*

- Built mentoring/coaching relationships with newer consultants and team members
- Encouraged personal growth and success for ultimate project success

**Health Care Analyst**

**Chevron Corporation**

**1989-1997**

- Responsible for plan design and vendor management for multiple carve-out benefit plans including FFS, POS, MHSA, PBM and over 70 HMOs nationwide
- Developed and monitored quality and clinical performance standards partnering with individual health plans and vendors. Presented techniques and strategies used in the development and tracing of performance standards at numerous industry conferences
- Negotiated contract language and fees for ASO contracts, as well as provider risk-sharing agreements for performance standards
- Worked with analytics company to monitor the performance of self-insured plans
- Directed annual strategic planning and operational rollout of Health and Welfare change of coverage. Recommended benefit design changes, participated in rate negotiations, and the determination of the addition and/or termination of health plans. Consulted on design and printing of member benefit comparison booklets and other communications that were distributed directly to employees
- Developed and published a consumer report card for all company medical plans – HMOs, POS, and FFS. Designed and conducted focus study groups at company locations across the country
- Served as project leader for an internal team that reviewed changes to company health care contributions strategies and eligibility rules
- Developed a corporate strategic goal to educate members and assist them in becoming wise health care consumers. With a focus on demand management

## **Volunteer Experience**

### **Board Member, Homeowners Association**

#### **Hawks Landing-Mequon Homeowners Association**

**2017- Present**

- Attend annual meetings, work with other board members to compile data and information for meetings
- Serve on Landscaping Committee – throughout the year working with multiple vendors for the maintenance care, removal and replacement of trees and other landscaping needs
- Assist President with communications and enforcing bi-laws
- Work with City officials to maintain development

### **Co- President, Parent Teacher Student Organization**

#### **Homestead High School, Mequon, WI**

**2018-2019**

- Coordinated and attended planning meetings at the beginning of the year for the 2018-19 school year PTSO activities
- Organized and attended monthly Board meetings and monthly member PTSO meetings, including customized coffees for Freshmen, Sophomore, Junior and Senior parents
- Planned and attended special recruiting activities throughout the year at school events
- Worked with coordinators of special events like Homecoming, Prom, Senior class events, Graduation, teacher appreciation activities
- Assured that all events and activities were being captured for communications coordinator

### **Volunteer Elder Care Assistant**

**2004-2018**

- Established a long-term (14 year) relationship with senior client through Ozaukee Family Services. Provided transportation, financial management support, banking support, prescription medication ordering, managed care at facility as well as frequently visited
- Conducted care facility search, organized move, and facilitated successful transition to a new residential home

## **Church Council Member, Project Leader and Teacher**

**St. Nicholas Orthodox Church, Cedarburg, WI**

**2000-Present (various roles)**

### *Church Council*

- Attended monthly Council meetings
- Lead projects as assigned
- Created, managed and completed bid projects for church maintenance

### *Sunday School Teacher –*

- Prepared lesson plans & projects for multiple classes
- Taught children every Sunday

### *Chairperson - Cedarburg Festivals Fundraiser – twice annually*

- Completed festival Jury Application for participation in both Strawberry and Wine Harvest Festivals
- Worked with City of Cedarburg on application for sales permit
- Obtained needed insurance coverage for festivals
- Coordinate fee payments with treasurer
- Recruited, Coordinated and assisted chairpersons with multiple functions
- Sourced equipment, food, beverages from multiple vendors and church members
- Organized and conduct planning meetings and workshops
- Kept master spreadsheet of volunteers & donations
- Kept ongoing communication with St. Nicholas's Priest

## **Education**

*University of Minnesota, Carlson School of Management – M.A., Industrial Relations (Human Resources)*

*University of Oregon, Lundquist College of Business – B.A., Management & Marketing; B.A., Psychology*

## **Software and Systems knowledge**

*Worked on multiple systems as a Benefit Counselor with Aon (as noted) it was necessary to learn them quickly and effectively to service the client callers and team members*

*Past experience as a Senior Consultant with Hewitt required strong in-depth use of Excel and PowerPoint software*