



**OFFICE OF THE COUNTY AUDITOR
JACKSON COUNTY, MISSOURI**

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**Q. TROY THOMAS, CPA
COUNTY AUDITOR**

JACKSON COUNTY COURTHOUSE
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Kansas City, Missouri 64106
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MEMORANDUM

TO: Honorable Members of the Jackson County Legislature

CC: Mary Jo Spino, Jackson County Clerk

FROM: Q. Troy Thomas, C.P.A. – County Auditor 

DATE: September 22, 2025

SUBJ: CBIZ Benefits & Insurance, Inc. Jackson County, Missouri
Resolutions & Bid Analysis

Before addressing various issues with the solicitation of bids and related documents for broker and consulting services for the County's group health, life, and dental insurance, I will examine the County's resolutions that awarded or recommended the awarding of contracts with CBIZ Benefits & Insurance, Inc. for these services. I have also provided definitions for some key terms used in the resolution below.

There are different types of term and supply contracts but the two most used are defined below (AI, 2024):

- Indefinite Delivery/Indefinite Quantity (IDIQ) Contracts: These are used for recurring needs where the exact quantities and delivery schedules aren't known in advance, allowing for a relationship with suppliers for various quantities over time.
- Fixed-Price Contracts: in these contracts the buyer and seller agree on a fixed price for the supplies or services. This offers budget certainty for the buyer and is often used when the scope of work is well-defined.

County Wide (AI, 2024): A county resolution that awards a contract to a vendor for "county-wide" use means that all departments, agencies, and offices within the county government can use the contract. The awarded vendor provides specific goods or services under the terms and negotiated prices of that single contract, streamlining procurement for the entire county organization.

RESOLUTIONS

Resolution No. 21992, dated August 18, 2025, recommended awarding a \$250,000 term and supply contract with CBIZ for “the furnishing of broker and consulting services for the County’s employee group health, life, and dental insurance for use county-wide.” However, the term “county-wide” is misleading, as it implies that other departments can use this contract, which is not the case.

Resolution No. 21992 (Pg. 2) states: “WHEREAS, CBIZ Benefits and & Insurance, Inc. proposes a consulting fee of \$165,000.00 provided by the medical carrier with no financial impact to Jackson County”. Although the fiscal note signed by the Chief Administrative Officer (Pg. 4) states: “The contract as awarded will have no fiscal impact on Jackson County.” The claim that the contract will have no fiscal impact on Jackson County cannot be valid because the recommended award is \$250,000. If the carrier pays \$165,000, then who will be paying the remaining \$85,000, if not Jackson County?

Additionally, the amendment to resolution number 21992, dated August 25, 2025, expanded the scope as follows: - “County-wide use for Human Capital services, Compensation Services, Specialized Recruitment, and additional services to CBIZ Benefits & Insurance, Inc.” This change increased the cost from \$250,000 to \$320,350. However, the fiscal note signed by the Chief Administrative Officer continued to state: “The contract as awarded will have no fiscal impact on Jackson County.” Now, the question is who will be responsible for a total of \$155,350 above the \$165,000 noted in the resolution that will be borne by the carrier, if not Jackson County?

Furthermore, the amended resolution No. 21992 included a new clause that incorrectly cited section 5.22, stating: “WHEREAS, the RFP No. 25-019 stated as follows: 5.22 The Successful Respondent will develop and/or assist in developing and evaluating associate needs and satisfaction surveys as requested.” **However, what RFP No. 25-019, section 5.22, actually states: “The Successful Respondent will provide their full range of services including, but not limited to, the following: Human Capital Services, Compensation Services, Specialized Recruitment, and additional services.”** This section is identical to last year’s RFP No. 24-024. Did the Administration intentionally change the meaning of section 5.22 to justify the additional \$70,350 cost?

PURCHASE ORDERS & PAYMENT HISTORY

The Department of Finance and Purchasing issued purchase orders to CBIZ totaling \$209,500 for the period January 1, 2024, to July 1, 2025, including a cancellation of one order on November 13, 2024, for \$14,750, and reissuing it on March 25, 2025, for the same amount. The P.O. was issued to CBIZ according to its “internal Memo, Consulting Services-

Contract No. 24-024, Resolution No. 21636, 2nd Amendment-Handbook consulting services as outlined on Addendum D.” Since this exceeded the scope of Resolution No. 21992, which authorized broker and consulting services for the County’s group health, life, and dental insurances, I believe it should have been bid separately or presented to the County Legislature for approval.

Jackson County Paid CBIZ a total of \$194,413 from January 1, 2024, through July 31, 2025. Included in these payments was \$52,978 paid to CBIZ for insurance policy renewals with Travelers Property Casualty for equipment floaters (policy periods: 7/1/2024 to 7/1/2025 and 7/1/2025 to 7/1/2026). These payments to CBIZ were outside the scope of Resolution No. 21636, dated May 20, 21024, approved by the County Legislature, which authorized a contract with CBIZ to provide broker and consulting services for the County’s group health, life, and dental insurances. The County should have solicited bids for the policies. Additionally, a partial payment of \$7,375 was paid To CBIZ for an Employee Handbook, as previously mentioned.

RFP No. 25-019 COMPARED To RFP No. 24-024

2025 RFP No. 25-019 and the 2024 RFP No. 24-024 were virtually identical, except as follows:

- In the Introduction for 2025 Human Capital Services replaced 2024’s request for Employee Benefits and Consulting Services; and,
- 5.24.1 was added for 2025, which stated: “List all additional services that can be provided that are not covered in this Request for Proposal by Respondent. Including pricing for optional services.”

Finally, according to one County evaluator of the two responses received for RFP No. 25-019, CBIZ was not the lowest bidder. In fact, IMA was, as one evaluator stated: “IMA was the lowest priced proposal for the scope of services in the RFP. MBE percentages were provided but my review did not include an extensive review to determine whether they met the full requirement.” But is it possible that the “Scoring Summary” gave CBIZ a score of 31.25 and IMA a score of 29.75 out of a total of 40 possible points for price? The evaluation committee should have included a written explanations with the Resolution for not recommending the lowest bidder.

In conclusion, although the evaluation process by the Administration and Resolution recommending the broker and benefits consulting contract to CBIZ was flawed, along with questionable payments to CBIZ outside the scope of the contract, I do not believe CBIZ is at fault. It is my recommendation that a contract for \$165,000 be awarded to CBIZ for the services mentioned above.

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Resolutions

Resolution No. 21992, August 18, 2025

Resolution No. 21992, August 25, 2025 - Floor Amendment

Resolution No. 21636, May 20, 2024

Resolution No. 20998, June 21, 2022

IN THE COUNTY LEGISLATURE OF JACKSON COUNTY, MISSOURI

A RESOLUTION awarding a twelve-month term and supply contract, with two twelve-month options to extend, for the furnishing of broker and consulting services for the County's employee group health, life, and dental insurances for use countywide to CBIZ Benefits & Insurance, Inc. of Kansas City, MO, under terms and conditions of Request for Proposals No. 25-019, at a cost to the County not to exceed \$250,000.00.

RESOLUTION NO. 21992, August 18, 2025

INTRODUCED BY Jalen Anderson, County Legislator

WHEREAS, the County has a continuing need for broker and consulting services for the County's employee group health, life, vision, dental, and welfare insurances; and,

WHEREAS, the Director of Finance and Purchasing issued Request for Proposals No. 25-019 in response to that need; and,

WHEREAS, a total of thirty-six notifications were distributed, and two proposals were received from the following:

BIDDERS

CBIZ Benefits & Insurance, Inc.
Kansas City (Jackson County), MO

IMA Financial Corp
Overland Park, KS

and,

WHEREAS, a committee of County staff members reviewed and evaluated all of these proposals; and,

WHEREAS, the evaluation committee recommended the award of a contract to CBIZ Benefits & Insurance, Inc. of Kansas City, MO; and,

WHEREAS, pursuant to section 1054.6 of the Jackson County Code, the evaluation committee and Interim Director of Human Resources now recommend the award of a twelve-month term and supply contract, with two twelve-month options to extend, for the furnishing of broker and consulting services to CBIZ Benefits & Insurance, Inc. of Kansas City, MO, under the terms and conditions of Request for Proposals No. 25-019, as the lowest and best remaining proposal based on evaluation points and price; and,

WHEREAS, CBIZ Benefits & Insurance, Inc. proposes a consulting fee of \$165,000.00 provided by the medical carrier with no financial impact to Jackson County; and,

WHEREAS, the execution of a contract with this vendor is in the best interests of the health, welfare, and safety of the associates of Jackson County; now therefore,

23,750.
29,250.
32,000.
85,000.
165,000.
250,000.

BE IT RESOLVED by the County Legislature of Jackson County, Missouri, that the award be made as recommended by the evaluation committee and Interim Director of Human Resources and that the Director of Finance and Purchasing be and hereby is authorized to execute for the County any documents necessary for the accomplishment of the award; and,

BE IT FURTHER RESOLVED that the Director of Finance and Purchasing be and hereby is authorized to make all payments, including final payment on the contract and any extensions thereto, to the extent that sufficient appropriations to the using spending agency are contained in the current Jackson County, Missouri budget.

Effective Date: This Resolution shall be effective immediately upon its passage by a majority of the Legislature.

APPROVED AS TO FORM:

Bryan Covinsky

Bryan Covinsky (Aug 14, 2025 15:51:25 CDT)

County Counselor

Certificate of Passage

I hereby certify that the attached resolution, Resolution No. 21992 of August 18, 2025, was duly passed on _____, 2025 by the Jackson County Legislature. The votes thereon were as follows:

Yeas _____

Nays _____

Abstaining _____

Absent _____

Date

Mary Jo Spino, Clerk of Legislature

The contract as awarded will have no fiscal impact on Jackson County.

08/14/2025

Date

Sylvia Stevenson

Sylvia Stevenson (Aug 14, 2025 16:38:45 CDT)

Chief Administrative Officer

IN THE COUNTY LEGISLATURE OF JACKSON COUNTY, MISSOURI

A RESOLUTION awarding a twelve-month term and supply contract, with two twelve-month options to extend, for the furnishing of broker and consulting services for the County's employee group health, life, and dental insurances for use County-wide and for Human Capital Services, Compensation Services, Specialized Recruitment, and additional services to CBIZ Benefits & Insurance, Inc. of Kansas City, MO, under terms and conditions of Request for Proposals No. 25-019, at a cost to the County not to exceed [\$250,000.00] \$320,350.00.

RESOLUTION NO. 21992, August 18, 2025

INTRODUCED BY Jalen Anderson, County Legislator

WHEREAS, the County has a continuing need for broker and consulting services for the County's employee group health, life, vision, dental, and welfare insurances; and,

WHEREAS, the County has a continuing need for a Human Capital Services, Compensation Services, Specialized Recruitment, and additional services; and,

WHEREAS, the Director of Finance and Purchasing issued Request for Proposals No. 25-019 in response to that need; and,

WHEREAS, the RFP No. 25-019 stated as follows:

5.22 The Successful Respondent will develop and/or assist in developing and evaluating associate needs and satisfaction surveys as requested.

5.22.1 Human Capital Services (Leave of Absence process and guidance, employee handbook compliance, performance management, Human Resources processes, HR compliance, and other Human Resources needs)

5.22.2 Compensation Services (compensation guidance, relevant market data, develop a pay structure, resources ensure market competitiveness, associate placement in pay structure)

5.22.3 Specialized Recruitment (recruitment services for hard to fill positions and supplemental staffing)

5.22.4 Additional services respondent can provide to Jackson County.

WHEREAS, a total of thirty-six notifications were distributed, and two proposals were received from the following:

BIDDERS

CBIZ Benefits & Insurance, Inc.
Kansas City (Jackson County), MO

IMA Financial Corp
Overland Park, KS

and,

WHEREAS, a committee of County staff members reviewed and evaluated all of these proposals; and,

WHEREAS, the evaluation committee recommended the award of a contract to CBIZ
CBIZ Benefits & Insurance, Inc. of Kansas City, MO; and,

WHEREAS, pursuant to section 1054.6 of the Jackson County Code, the evaluation committee and Interim Director of Human Resources now recommend the award of a twelve-month term and supply contract, with two twelve-month options to extend, for the furnishing of broker and consulting services, Human Capital Services, Compensation Service, Specialized Recruitment, and additional related services to CBIZ Benefits & Insurance, Inc. of Kansas City, MO, under the terms and conditions of Request for Proposals No. 25-019, as the lowest and best remaining proposal based on evaluation points and price; and,

WHEREAS, CBIZ Benefits & Insurance, Inc. proposes a consulting fee of \$165,000.00 provided by the medical carrier with no financial impact to Jackson County; and,

WHEREAS, the execution of a contract with this vendor is in the best interests of the health, welfare, and safety of the associates of Jackson County; now therefore,

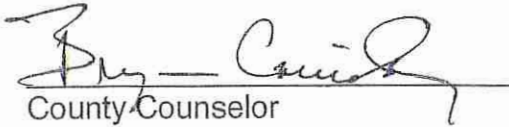
BE IT RESOLVED by the County Legislature of Jackson County, Missouri, that the award be made as recommended by the evaluation committee and Interim Director of Human Resources and that the Director of Finance and Purchasing be and hereby is authorized to execute for the County any documents necessary for the accomplishment of the award; and,

23	750
22	250
30	000
00	000
00	000
00	000
00	000
00	000

BE IT FURTHER RESOLVED that the Director of Finance and Purchasing be and hereby is authorized to make all payments, including final payment on the contract and any extensions thereto, to the extent that sufficient appropriations to the using spending agency are contained in the current Jackson County, Missouri budget.

Effective Date: This Resolution shall be effective immediately upon its passage by a majority of the Legislature.

APPROVED AS TO FORM:


County Counselor

Certificate of Passage

I hereby certify that the attached resolution, Resolution No. 21992 of August 18, 2025, was duly passed on _____, 2025 by the Jackson County Legislature. The votes thereon were as follows:

Yeas _____ Nays _____

Abstaining _____ Absent _____

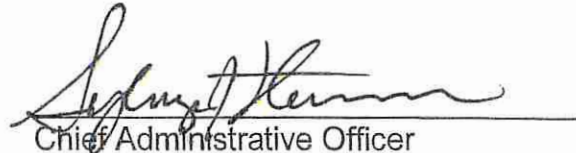
Date

Mary Jo Spino, Clerk of Legislature

The contract as awarded will have no fiscal impact on Jackson County.

8/25/2025

Date


Chief Administrative Officer

IN THE COUNTY LEGISLATURE OF JACKSON COUNTY, MISSOURI

A RESOLUTION awarding a twelve-month term and supply contract for the furnishing of broker and consulting services for the County's employee group health, life, and dental insurances for use County-wide to CBIZ Benefits of Kansas City, MO, under terms and conditions of Request for Proposals No. 24-024, at no cost to the County.

RESOLUTION NO. 21636, May 20, 2024

INTRODUCED BY Megan L. Marshall, County Legislator

WHEREAS, the County has a continuing need for broker and consulting services for the County's employee group health, life, and dental insurances; and,

WHEREAS, the Director of Finance and Purchasing issued Request for Proposals No. 24-024 in response to that need; and,

WHEREAS, a total of forty-eight notifications were distributed and four proposals were received from the following:

BIDDERS

CBIZ Benefits
Kansas City (Jackson County), MO

Twin Lakes
Lee's Summit, MO

Garry & Associates
North Kansas City, MO

ABID Talent, LLC
Alpharetta, GA

and,

WHEREAS, a committee of County staff members reviewed and evaluated all of these proposals; and,

WHEREAS, the evaluation committee recommended the award of a contract to CBIZ Benefits of Kansas City, MO; and,

WHEREAS, Resolution 21575, dated March 25, 2024, which would have awarded a contract to CBIZ Benefits of Kansas City, MO, was not adopted by the County Legislature; and,

WHEREAS, in view of the Legislature's previous action on Resolution 21575, pursuant to section 1054.6 of the Jackson County Code, the evaluation committee and Director of Human Resources now recommend the award of a twelve-month term and supply contract with no option for automatic renewal at the rate of the true lowest and first bidder's service fee, charged on a fixed fee in equal monthly installments of \$7,000.00; and requires a new bidding process to determine the 2024-2025 insurance broker that must include an independent, third-party consultant that will ensure bidder specific information remains anonymous and blinding the evaluation committee from what insurance broker bidder they are evaluating and also to have this independent, third-party consultant, to at least providing a grading rubric for evaluation that at least includes: Minority, Diversity, and Women Business Enterprise (MBE/DBE/WBE) inclusion as a priority for coreing broker bidders in addition to pricing, experience, etc. and graded by a committee to include associates from Parks+ Rec, Human Resources (excluding the

Director to eliminate issues of bias), County Corrections and the County Auditor's Office;
and,

WHEREAS, the execution of a contract with this vendor is in the best interests of the health, welfare, and safety of the citizens of Jackson County; now therefore,

BE IT RESOLVED by the County Legislature of Jackson County, Missouri, that the award be made as recommended by the evaluation committee and Director of Human Resources and that the Director of Finance and Purchasing be and hereby is authorized to execute for the County any documents necessary for the accomplishment of the award;
and,

BE IT FURTHER RESOLVED that the Director of Finance and Purchasing be and hereby is authorized to make all payments, including final payment on the contract to the extent that sufficient appropriations to the using spending agency are contained in the then current Jackson County budget.

Effective Date: This Resolution shall be effective immediately upon its passage by a majority of the Legislature.

APPROVED AS TO FORM:

Bryan Covinsky
Bryan Covinsky (May 16, 2024 10:16 CDT)
County Counselor

Certificate of Passage

I hereby certify that the attached resolution, Resolution No. 21636 of May 20, 2024, was duly passed on June 17, 2024 by the Jackson County Legislature. The votes thereon were as follows:

Yeas 7 Nays 2
Abstaining 0 Absent 0

6.18.2024
Date

Mary Jo Spino
Mary Jo Spino, Clerk of Legislature

The contract as awarded will have no fiscal impact on Jackson County.

05/16/2024
Date

Sylvia Stevenson
Sylvia Stevenson (May 16, 2024 10:27 CDT)
Chief Administrative Officer

IN THE COUNTY LEGISLATURE OF JACKSON COUNTY, MISSOURI

A **RESOLUTION** awarding a twelve-month term and supply contract with one twelve-month option to extend for the furnishing of broker and consulting services for the County's employee group health, life, and dental insurance for use County-wide to CBIZ Benefits of Kansas City, MO, under terms and conditions of Request for Proposals No. 42-21, at no cost to the County for 2022.

RESOLUTION NO. 20998, June 21, 2022

INTRODUCED BY Crystal Williams, County Legislator

WHEREAS, the County has a continuing need for broker and consulting services for the County's employee group health, life, and dental insurance; and,

WHEREAS, the Director of Finance and Purchasing issued **Request for Proposals No. 42-21** in response to that need; and,

WHEREAS, a total of sixty-seven notifications were distributed and five proposals were received from the following:

BIDDERS

Segal Group
Chicago, IL

Phase Consulting Partners
Miami, FL

CBIZ Benefits
Kansas City (Jackson County), MO

Twin Lakes
Lee's Summit, MO

Holmes Murphy & Associates
Kansas City, MO

Garry & Associates
North Kansas City, MO

and,

WHEREAS, a committee of County staff members reviewed and evaluated all of these proposals; and,

WHEREAS, the evaluation committee recommended the award of a contract to Segal Group of Chicago, IL; and,

WHEREAS, Resolution 20914, dated April 4, 2022, which would have awarded a contract to Segal Group of Chicago, IL, was not adopted by the County Legislature; and,

WHEREAS, in view of the Legislature's previous action on Resolution 20914, pursuant to section 1054.6 of the Jackson County Code, the evaluation committee and Director of Human Resources now recommend the award of a twelve-month term and supply contract with one twelve-month option to extend, for the furnishing of broker and consulting services to CBIZ Benefits of Kansas City (Jackson County), MO, under the terms and conditions of Request for Proposals No. 42-21, as the lowest and best remaining proposal based on evaluation points and price; and,

WHEREAS, CBIZ Benefits has agreed to the same compensation and terms as were proposed by Segal Group, the first recommended lowest bidder; and,

WHEREAS, under the recommended contract, CBIZ Benefits will be paid for its services in 2022 by the County's insurance providers and in 2023 and 2024 out of budgeted County funds; and,

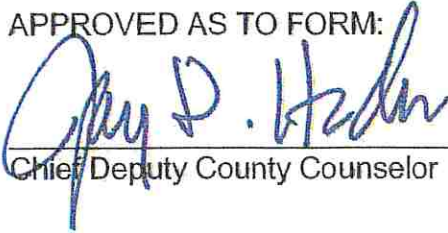
WHEREAS, the execution of a contract with this vendor is in the best interests of the health, welfare, and safety of the citizens of Jackson County; now therefore,

BE IT RESOLVED by the County Legislature of Jackson County, Missouri, that the award be made as recommended by the evaluation committee and Director of Human Resources and that the Director of Finance and Purchasing be and hereby is authorized to execute for the County any documents necessary for the accomplishment of the award; and,

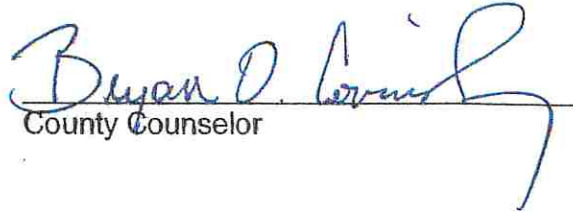
BE IT FURTHER RESOLVED that the Director of Finance and Purchasing be and hereby is authorized to make all payments, including final payment on the contract and any extensions thereto, to the extent that sufficient appropriations to the using spending agency are contained in the then current Jackson County budget.

Effective Date: This Resolution shall be effective immediately upon its passage by a majority of the Legislature.

APPROVED AS TO FORM:



Chief Deputy County Counselor



County Counselor

Certificate of Passage

I hereby certify that the attached resolution, Resolution No. 20998 of June 21, 2022, was duly passed on June 27, 2022 by the Jackson County Legislature. The votes thereon were as follows:

Yeas 5

Nays 3

Abstaining 0

Absent 1

June 27, 2022

Date



Mary Jo Spino, Clerk of Legislature

This obligation for 2022 will be paid out of funds in the custody of the County's group employee insurance providers. Funding for future years is subject to appropriation in the County's then current annual budget.

6/16/2022

Date



Chief Administrative Officer

CBIZ

Purchase Orders and Amendment

CBIZ
JACKSON COUNTY, MISSOURI
PURCHASE ORDERS
For The Period January 1, 2024 To July 31, 2025

PRCHASE ORDER			
Date	Description	Number	Amount
2/27/2024	T&S:Professional Sevices as needed ([Bid No.] 42-21), billed monthly. For the period 1/1/2024 to 12/31/2024. Invoiced: \$70,500.	10001038	\$90,000
11/13/2024	T&S: Miscellaneous Services as needed([Bid No.] 24-024, Res.No.21636); cancelled on 3/18/2025 (reason: longer needed). For the period 10/1/2024 to 12/5/2025. Invoiced: \$0.	10004844	14,750
3/25/2025	T&S: Consulting sevice, per [Bid] No. 24-024, Res.No. 21636, 2nd Amendment-Handbook consulting services as out lined on Addendum D.For the period 1/1/2025 to 12/31/2025. Invoiced: \$7,375.	10006988	14,750
3/25/2025	T&S: Services as required, per Bid No.24-024, Res. No. 21636. For the period 1/1/2025 to 12/31/2025. Invoiced: \$35,000,	10006989	90,000
Total			\$209,500
Less: Cancelled P.O.			(14,750)
Adjusted Total			<u>\$194,750</u>



SECOND AMENDMENT TO SERVICES AGREEMENT

THIS SECOND AMENDMENT TO SERVICES AGREEMENT is made and entered by and between Jackson County, Missouri ("Employer") and CBIZ Benefits & Insurance Services, Inc. ("CBIZ").

WHEREAS, the parties have entered into a certain Services Agreement effective July 1, 2022 (the "Agreement") and a certain First Amendment to Services Agreement effective July 1, 2024 (the "First Amendment"); and

WHEREAS, the parties wish to amend the Agreement as specifically set forth below.

NOW THEREFORE, for good and valuable consideration, the parties agree as follows:

I. The parties agree that CBIZ will provide Employee Handbook Consulting Services as outlined on Addendum D, attached hereto and made a part of the Agreement. Employer agrees to pay the fee for those services as outlined on Addendum D..

II. The effective date of this Second Amendment is October 1, 2024.

III. The parties to this Second Amendment hereby agree to ratify and renew all other terms and conditions of the Agreement and First Amendment, unless specifically modified herein, and acknowledge that the Agreement, First Amendment, and this Second Amendment shall remain in full force and effect.

IN WITNESS WHEREOF, CBIZ and Employer have caused this Second Amendment to Services Agreement to be executed on the date written below.

Employer

Jackson County, Missouri

By: Michelle Chusmen

Title: Director of Human Resources

Date: 10/15/2024

CBIZ Benefits & Insurance Services, Inc.

By: Kenny M. McLeod

Title: Executive Vice President

Date: 10/14/2024

APPROVED AS TO FORM

[Signature]
County Counselor

ATTEST:

[Signature]
Clerk of the County Legislature

FILED

OCT 18 2024 Revised 8/2024

MARY JO SPINO
COUNTY CLERK

ADDENDUM D EMPLOYEE HANDBOOK CONSULTING SERVICES

Employee Handbook

- ❖ Review HR-related policies in the employee handbook
- ❖ Meet with key Employer stakeholders responsible for creating and implementing company policies and procedures to gain additional understanding.
- ❖ Draft revised employee handbook that is compliant with federal and state law.
- ❖ Provide recommendations, adding and consolidating policies as necessary based on compliance and best practices.
- ❖ Coordinate the edit and review process by incorporating feedback from the key personnel and the organization's choice of legal counsel to ensure consistent application of policies and compliance with legal requirements.
- ❖ Provide an electronic copy of the consolidated final version of the employee handbook.

Employer Responsibilities

- ❖ Make all management decisions as it relates to all HR process and policies and will have the option to have the employee handbook updated for an additional fee.

Annual Employee Handbook Review *(if requested and for an additional fee)*

- ❖ Comprehensive legal review for federal compliance and updates
- ❖ State/locality review for compliance and updates
- ❖ Update policies and language to reflect changes in the organization
- ❖ Draft revised Employee Handbook
- ❖ Provide recommendations as requested based on compliance and best practices
- ❖ Coordinate the edit and review process by incorporating feedback from the key personnel and the organization's choice of legal counsel to ensure consistent application of policies, and compliance with legal requirements
- ❖ Provide an electronic copy of the consolidated final version of the Employee Handbook

Develop New HR-related Policies *(if requested and for an additional fee)*

- ❖ Meet with key Employer stakeholders responsible to create and implement new policies and procedures telephonically gain additional understanding
- ❖ Draft new policy based on compliance and best practices
- ❖ Coordinate the edit and review process by incorporating feedback from the key personnel and the organization's choice of legal counsel to ensure consistent application of policies and compliance with legal requirements
- ❖ Provide an electronic copy of the final policy

This Agreement is an Administrative Services Only (ASO) agreement. Employer will retain all management decisions regarding human resources. CBIZ will advise management on these matters but will not assume responsibilities for decision-making.

Based upon our prior experience in conducting similar projects, we estimate total professional fees associated with this project to be as detailed below.

Professional Fees

PROJECT	FIXED CONSULTING FEE
Employee Handbook*	\$14,750
Annual Renewal - Optional	\$6,000

If the volume of work changes substantially due to a change in scope, CBIZ may need to discuss an adjustment in the professional fees documented herein. CBIZ does not anticipate that this will occur; however, we would discuss this with you before proceeding and obtain your prior approval.

In addition to professional fees, we bill clients for direct project expenses. Items such as travel, overnight mail, courier services, etc. are considered expenses and are billed as incurred. CBIZ will bill for all out of pocket expenses approved by management.

Fees and expenses are collected on a monthly basis for the services performed in the prior month. Such fees are collected via ACH from CBIZ payroll unless otherwise discussed. Fees are due upon receipt of the bill and accounts are considered past due if payment is not received by the end of the following month. In the event payment is not made when due, a monthly finance charge of 1.5% will be added to the outstanding balance and services will be suspended if payment is more than 60 days in arrears. Any questions concerning the bill should be brought to our attention.

CBIZ Payment History

CBIZ
JACKSON COUNTY, MISSOURI
PAYMENT HISTORY
For The Period January 1, 2024 To July 31, 2025

INVOICE				CHECK		
Date	Description	Supplier Inv	Inv. Amount	Number	Amount	
01/01/24	Benefit Related Consulting - Jan 2024	SI-10004756	\$ 7,500	3/25/2024	-	-
02/01/24	Benefit Related Consulting - Feb 2024	SI-10004758	7,500	3/25/2024	1102800	15,000
03/01/24	Benefit Related Consulting - March 2024	SI-10004761	7,500	3/26/2024	1102965	7,500
04/01/24	Benefit Related Consulting - May 2024	SI-10010739	7,500	5/10/2024	1105457	7,500
05/01/24	Benefit Related Consulting - June 2024	SI-10014276	7,500	6/13/2024	1107099	7,500
06/01/24	Benefit Related Consulting - April 2024	SI-10021310	7,500	8/15/2024	1109673	7,500
06/17/24	Travelers Property Casualty Renewal: Equipment Floater 7-1-24 to 7-1-25	SI-10015829	25,261	7/3/2024	1107926	25,261
07/01/24	Benefit Related Consulting - July 2024	SI-10025480	7,500	10/3/2024	1112052	7,500
08/07/24	Benefit Related Consulting - August 2024	SI-10025459	7,500	10/3/2024	1112113	7,500
09/06/24	Benefit Related Consulting - September 2024	SI-10023768	6,000	9/12/2024	1110924	6,000
10/04/24	Benefit Related Consulting - October 2024	SI-10032442	7,000	10/4/2024	1112591	7,000
11/07/24	Benefit Related Consulting - November 2024	SI-10029917	7,000	11/14/2024	1113945	7,000
12/05/24	Benefit Related Consulting - December 2024	SI-10003242	7,000	12/12/2024	1115018	7,000
Subtotal			\$ 112,261			\$ 112,261

CBIZ
JACKSON COUNTY, MISSOURI
PAYMENT HISTORY
For The Period January 1, 2024 To July 31, 2025

INVOICE				CHECK		
Inv Date	Description	Supplier Inv	Inv. Amount	Date	Number	Amount
01/09/25	Benefit Related Consulting - January 2025	SI-10035441	\$ 7,000	1/31/2025	1117184	\$ 7,000
01/29/25	Handbook (Past Due Invoice(s) Jan 2025	SI-10043964	7,375	4/17/2025	1120689	7,375
02/06/25	Benefit Related Consulting - January 2025	SI-10037885	7,000	2/10/2025	1117566	7,000
03/06/25	Benefit Related Consulting - March 2025	SI-10040205	7,000	3/13/2025	1119014	7,000
04/07/25	Benefit Related Consulting - April 2025	SI-10043158	7,000	4/10/2025	1120092	7,000
05/05/25	Travelers Property Casualty Renewal: Equipment Floater 7-1 -25 to 7-1-26	SI-10049230	27,777	6/12/2025	1122903	27,777
05/06/25	Benefit Related Consulting - May 2025	SI-10046049	7,000	5/9/2025	1121528	7,000
06/05/25	Benefit Related Consulting - June 2025	SI-10048907	7,000	6/12/2025	1122904	7,000
07/03/25	Benefit Related Consulting - July 2025	SI-10051241	7,000	7/10/2025	1124013	7,000
	Subtotal		84,152			84,152
	Subtotal-Pg. 1		112,261			112,261
	Grand Total	\$	196,413		\$	196,413

Human Capital Management Intake Form

Human Capital Management Services

Submitted by Michelle Chrisman on Mar 18th, 2025

Assigned To

Status

Request Details

Request Title

Human Capital Management Services

Category of your request

Other Consulting & Services

Description of sourcing need

Human Capital Management Services for the procurement and acquisition of health, dental, vision, welfare benefits, and additional services.

Department

Human Resources

Department Approver

Gina Campbell

Estimated Cost

\$90,000

Is there Grant Money involved

No

Has Grant Money been accepted and/or approved by Leg

No

Budget

56320

Date needed by

06/03/2025

List any additional individuals involved in the project

Gina Campbell

Who will be on Evaluation Committee

Carmen Hayes, Dianne Kimzey, Gina Campbell, Cindy Wallace

Provide a list of suggested vendors

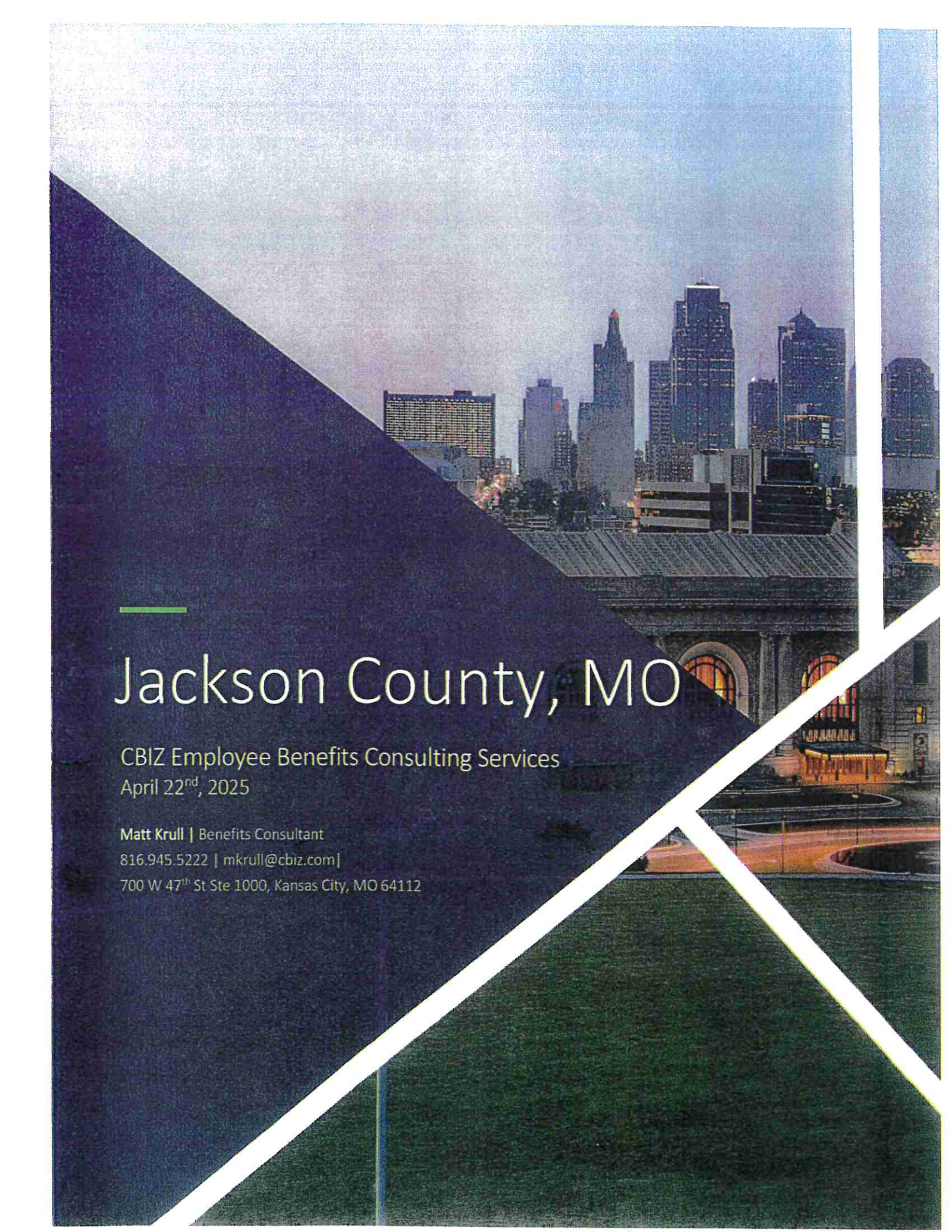
CBIZ, Segal, Holmes Murphy, Twin Lakes, Lockton, IMA Corp.

Additional information

CBIZ

25-019

Request for Proposal



Jackson County, MO

CBIZ Employee Benefits Consulting Services
April 22nd, 2025

Matt Krull | Benefits Consultant
816.945.5222 | mkrull@cbiz.com
700 W 47th St Ste 1000, Kansas City, MO 64112

1.0 INTRODUCTION

- 1.1 Jackson County, Missouri is seeking proposals from qualified Respondents to provide Human Capital Management Services for the procurement and acquisition of health, dental, vision, life, welfare benefits and additional services for use by the Human Resources Department.
- 1.2 This is Jackson County, Missouri Request for Proposal No. 25-019, Response Deadline is 2:00 PM on April 22, 2025. Please Note: all submissions must be uploaded to the Bonfire portal by 2:00 PM on April 22, 2025. Failure to do so will result in the rejection of your proposal, as the software will not accept late entries. However, if you submit your proposal early, you can edit it up until the 2:00 PM deadline.
- 1.3 Submission of Proposals: Proposals must be submitted on-line through the Bonfire Portal at <https://jacksongov.bonfirehub.com>. Proposals submitted by any other method will not be considered.
- 1.4 Term of Contract: Twelve (12) Months, with Two (2) Twelve (12) Month Options to Extend.
- 1.5 If proposal documents are obtained by the Respondent from a source other than Bonfire, it will be the Respondent's responsibility to verify all due dates and pertinent information (Response Deadline, Question Deadline, Intent to Bid Deadline, and Addendums) in the Bonfire Portal.

2.0 QUESTION PROCEDURE

- 2.1 All questions regarding this Request for Proposal shall be communicated electronically through the Bonfire Portal via the Opportunity Q & A in the Request for Proposal.
- 2.2 All questions must be received on the Bonfire Portal by 5:00 PM on April 15, 2025
- 2.3 All questions will be answered in the form of Addenda/Amendments to the Request for Proposal on the Bonfire Portal.
- 2.4 Respondents or their agents (including subcontractors, associates, consultants, or their agents) may not contact any other County employees, staff or elected officials regarding the matters covered by this Request for Proposal during the solicitation or evaluation process. Inappropriate contacts are grounds for REJECTION OF YOUR PROPOSAL.

3.0 AWARD REQUIREMENTS

- 3.1 Certificate of Insurance: The Successful Respondent will be required to submit to the Purchasing Department a Certificate of Insurance meeting or exceeding the provisions of Exhibit A herein, within ten (10) business days after receiving Notification of Award.

4.2.1 2024 Spend: \$23,584,070

4.2.2 Projected Year-End 2024 Spend: \$26,038,029*

* Projected Year-End Spend is pro-rated based on Jackson County's YTD result.

Actual result will differ based on the group's claim performance. Additionally, 2025 spend is net of Jackson County's YTD aggregate stop loss claim.

5.0 SCOPE OF SERVICES

5.1 The Successful Respondent must prepare a proposal and solicit proposals from a variety of health, dental, vision and life insurance providers on behalf of the County. Respondents will assist Jackson County in evaluating the proposals submitted directly to the County and provide strong market access with support and execution of vendor and carrier marketing for all benefit product lines including quote analysis, contract negotiations, and new vendor implementation.

5.2 The Successful Respondent will facilitate and ensure that the required plan documents and legal requirements meet state and federal regulatory requirements.

5.3 The Successful Respondent will provide analyses of, and recommendations for, various insurance plans and funding alternatives.

5.4 The Successful Respondent will assist the County with carrier renewals on an annual basis including renewal negotiations on behalf of Jackson County to ensure we are receiving appropriate and affordable pricing with quality services and support from plan vendors.

5.5 The Successful Respondent will attend/coordinate selected meetings with County Administration, County Legislature, Human Resources, and associate meetings as required to support the selection process and decision.

5.6 The Successful Respondent will provide the County with information on emerging market trends. Recommend alternative benefit plan designs, delivery systems, funding and communication methods as dictated by environmental/regulatory changes and emerging technologies.

5.7 The Successful Respondent will assist in the administration of annual (or special) enrollment, as required.

5.7.1 Annual Benefit Sign Up/Open Enrollment: Advise and assist the County in developing, implementing, and conducting the annual on-line benefit enrollment. Assist the County in developing, implementing, and conducting enrollment by all plan members. Assist with providing a summary of benefits and other written communications to distribute to all associates during open enrollment process. Assist in coordination of/and facilitate schedules with all benefit plan representatives and County associates for yearly open enrollment process.

- 5.16 Claim Mediation: Provide liaison services between the Human Resources Department Benefits Administrator point of contact and benefits contracts, including coordination or reporting and assistance resolving claims.
- 5.17 The Successful Respondent will assist with resolution of specific claims and/or issues, including but not limited to: bill reconciliation, as needed and/or when requested by the County and/or individual plan members.
- 5.18 Reporting: Prepare and forward Federal regulatory information to Jackson County for review on a quarterly or annual basis, including data necessary for IRS Form 5500 as the County's Section 125 medical reimbursement plan exceeds 100 participants.
- 5.19 The Successful Respondent must agree to work collaboratively with any other consultants, or consulting firms and/or legal firms the County has contracted with for consulting and/or legal services.
- 5.20 The Successful Respondent will provide guidance, implementation, and support of the County's wellness initiatives. The Wellness Program consists of a Wellness Coach, activities/programs, and incentives.
- 5.21 The Successful Respondent will develop and/or assist in developing and evaluating associate needs and satisfaction surveys as requested.
- 5.22 The Successful Respondent will provide their full range of services including, but not limited to, the following:
- 5.22.1 Human Capital Services (Leave of Absence process and guidance, employee handbook compliance, performance management, Human Resources processes, HR compliance, and other Human Resources needs)
 - 5.22.2 Compensation Service (compensation guidance, relevant market data, develop a pay structure, resources ensure market competitiveness, associate placement in pay structure)
 - 5.22.3 Specialized Recruitment (recruitment services for hard to fill positions and supplemental staffing)
 - 5.22.4 Additional services respondent can provide Jackson County.
- 5.23 Jackson County may do business with MARCIT, Missouri Consolidated, or become Self-Insured and will not entertain a proposal, through a Broker, from MARCIT, Missouri Consolidated, or Self-Insurance. Jackson County prefers to deal directly with MARCIT, Missouri Consolidated, or Self-Insurance.

- 5.24 The Successful Respondent will provide pricing structure: consultant fee structure, fee-for-service. The fee schedule must be included, and explain why this is in the best interest of Jackson County.
- 5.24.1 List all additional services that can be provided that are not covered in this Request for Proposal by Respondent. Include pricing for optional services.
- 5.25 The Successful Respondent will ensure that any healthcare plan will incorporate County owned TMC Hospital Network and TMC Advantage Plan.
- 5.26 The Successful Respondent will assist and direct County in process to move from partially funded to fully funded health plan.
- 5.27 The Successful Respondent will provide the lowest reasonable costs consistent with Jackson County financial objectives.
- 5.28 The Successful Respondent will provide a list of the services that will be included in their scope of services. Please indicate any services that may be involved added costs.
- 5.29 The Successful Respondent will provide your firm's policy regarding compensation transparency.

6.0 PROPOSAL FORMAT

- 6.1 Respondent's Proposal shall be on letterhead or plain paper and uploaded to the Bonfire Portal with Purchasing Forms (Attachment B) and shall consist of the following:
- 6.1.1 Cover Letter to include the following:
- 6.1.1.1 Respondent's Name, Address, Phone Number and Email address
- 6.1.1.2 Contact Person's Name, Title, Phone Number and Email address
- 6.1.2 Description of Respondent's Background to include the following:
- 6.1.2.1 Year of inception and history
- 6.1.2.2 Ownership Structure
- 6.1.3 Experience and Qualifications to include the following:
- 6.1.3.1 Details of Experience and Qualifications
- 6.1.3.2 Understanding of Scope of Services
- 6.1.3.3 Ability to provide the services required
- 6.1.4 References: Include a minimum of three references on contracts similar to this one. References shall include company name, contact person telephone number and email address.

5.24 The Successful Respondent will provide pricing structure: consultant fee structure, fee-for-service. The fee schedule must be included, and explain why this is in the best interest of Jackson County.

5.24.1 List all additional services that can be provided that are not covered in this Request for Proposal by Respondent. Include pricing for optional services.

5.25 The Successful Respondent will ensure that any healthcare plan will incorporate County owned TMC Hospital Network and TMC Advantage Plan.

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6.1.1.2 Contact Person's Name, Title, Phone Number and Email address

6.1.2 Description of Respondent's Background to include the following:

6.1.2.1 Year of inception and history

6.1.2.2 Ownership Structure

6.1.3 Experience and Qualifications to include the following:

6.1.3.1 Details of Experience and Qualifications

6.1.3.2 Understanding of Scope of Services

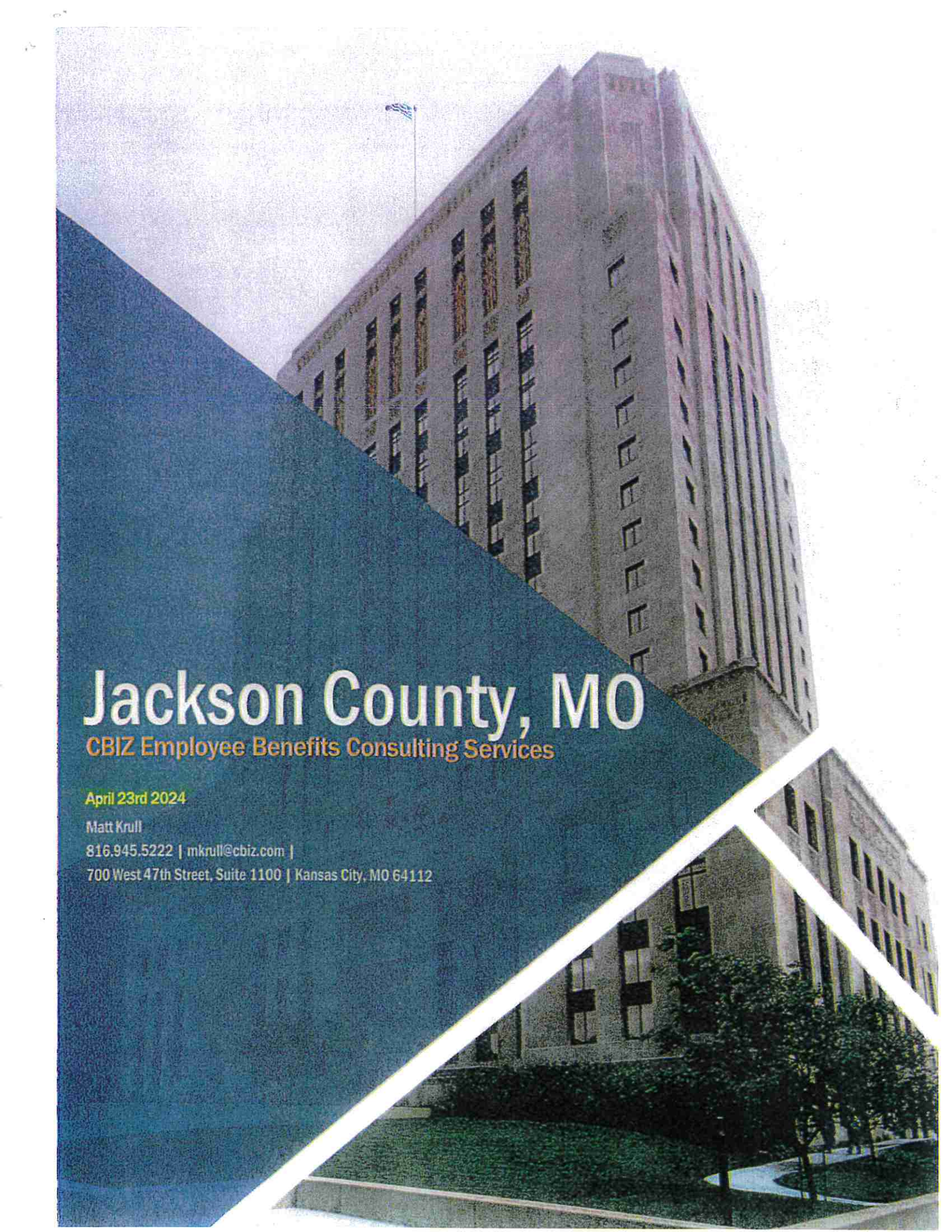
6.1.3.3 Ability to provide the services required

6.1.4 References: Include a minimum of three references on contracts similar to this one. References shall include company name, contact person telephone number and email address.

CBIZ

24-024

Request for Proposal



Jackson County, MO

CBIZ Employee Benefits Consulting Services

April 23rd 2024

Matt Krull

816.945.5222 | mkrull@cbiz.com |

700 West 47th Street, Suite 1100 | Kansas City, MO 64112

1.0 INTRODUCTION

- 1.1 Jackson County, Missouri is seeking proposals from qualified Respondents to provide **Employee Benefits Consulting Services** for the procurement and acquisition of health, dental, vision, life, and welfare benefits for use by the Human Resources Department.
- 1.2 The term of this Contract will be Twelve (12) Months, with Two (2) Twelve (12) Month Option to Extend.

2.0 BACKGROUND

- 2.1 The County is committed to providing its associates with comprehensive, high quality, and cost-effective associate benefit plans and programs that provide optimum value to both the County, and its associates. The County is seeking to establish relationships with a consultant firm to assist in achieving its goals and objectives related to these benefit plans. Examples of these goals and objectives include:
 - 2.1.1 Long-Term Optimate Value in County-Sponsored Health Plans: The County is committed to stabilizing and controlling plan costs in its health and welfare benefits program while obtaining optimal value (best price, quality of care and quality of service) for plan participants. This will require the County's consultant to assist in holding its providers accountable for delivering high quality, cost-effective care with a strong emphasis on delivering comprehensive preventive care. The County expects providers to help stabilize the control plan costs while minimizing future cost increases in this manner.
 - 2.1.2 Associate Communication: The County desires to develop and implement a comprehensive health and dental benefits communication strategy and program that will actively involve, and help associates better understand and make the best use of their health and dental benefits while encouraging the practice of healthy lifestyles and self-responsibility.
 - 2.1.3 Information Reporting and Performance Measurement: Collection, reporting and analysis of data are critical in measuring and comparing plan provider performance. The County believes a key part of this process requires providers to regularly examine and improve their systems for assuring that necessary performance data is collected and care is being delivered in the most efficient and cost-effective manner. It is expected the County's benefits consultant will fully support the County in its efforts to continue acquiring and analyzing this important information from County medical plan providers on no less than a quarterly basis.
- 2.2 Total Health Insurance Spend, which is fixed cost, and everything billed to Jackson County's monthly claims invoice:
 - 2.2.1 2023 Spend: \$23,304,887
 - 2.2.2 Projected Year-End 2024 Spend: \$23,236,177*
*Projected year-end spend is pro-rated based on Jackson County's YTD result. Actual result will differ based on the group's claim performance. Additionally, 2024 spend is net of Jackson County's YTD aggregate stop loss claim.

3.0 AWARD REQUIREMENTS

- 3.1 Certificate of Insurance: The Successful Respondent will be required to submit to the Purchasing Department a Certificate of Insurance meeting or exceeding the provisions of Exhibit A included herein within ten business days after receiving Notification of Award. The Certificate of Insurance must be received by the Purchasing Department prior to the commencement of any work on this project.
- 3.2 Licenses: The Successful Respondent must provide, upon written request, evidence of any required Federal, State, Local and/or Occupational Licenses.
- 3.3 Compliance with Chapter 6 of the Jackson County Code for Minority, Women and Veteran Business Enterprise utilization will be required on any resulting Contract. The Contractor's Utilization Plan, included herein, must be filled out, and if goals are assigned, they will be mandatory for any award on this project.

4.0 SCOPE OF SERVICES

- 4.1 The Successful Respondent must prepare a proposal and solicit proposals from a variety of health, dental, vision and life insurance providers on behalf of the County. Respondent will assist Jackson County in evaluating the proposals submitted directly to the County and provide strong market access with support and execution of vendor and carrier marketing for all benefit product lines including quote analysis, contract negotiations, and new vendor implementation.
- 4.2 The Successful Respondent will facilitate and ensure that the required plan documents and legal requirements meet state and federal plan regulatory requirements.
- 4.3 The Successful Respondent will provide analyses of, and recommendations for, various insurance plans and funding alternatives.
- 4.4 The Successful Respondent will assist the County with carrier renewals on an annual basis including renewal negotiations on behalf of Jackson County to ensure we are receiving appropriate and affordable pricing with quality services and support from plan vendors.
- 4.5 The Successful Respondent will attend/coordinate selected meetings with County Administration, County Legislature, Human Resources, and associate meetings as required to support the selection process and decisions.
- 4.6 The Successful Respondent will provide the County with information on emerging market trends. Recommend alternative benefit plan designs, delivery systems, funding and communication methods as dictated by environmental/regulatory changes and emerging technologies.
- 4.7 The Successful Respondent will assist in the administration of annual (or special) enrollment, as required.
 - 4.7.1 Annual Benefit Sign Up/Open Enrollment: Advise and assist the County in developing, implementing, and conducting the annual on-line benefit enrollment. Assist the County in developing, implementing, and conducting enrollment by all plan members. Assist with providing a summary of benefits and other written communications to distribute to all associates during open enrollment processes. Assist in coordination of/and facilitate schedules with all benefit plan representatives and County personnel for yearly open enrollment processes.
- 4.8 The Successful Respondent will provide financial reporting, plan analytics and predictive modeling expertise to help with decision making and cost projections. Review claims experience, claim service, and claim administration to ensure maximum benefits to Jackson County.
- 4.9 Benefit Program Design: Provide benefit information to enable the County to make effective decisions in developing an overall Associate Benefits Program that is comprehensive and meets established objectives with respect to cost and competitiveness with the goal of attracting and retaining associates.
 - 4.9.1 Additional services for benefit program design may include, but are not limited to:
 - 4.9.1.1 Calculating the increased costs for renewal of insurance for the County,
 - 4.9.1.2 Providing "what-if" scenarios for the County regarding renewals of insurance,
 - 4.9.1.3 Calculate and provide alternative funding methods.
- 4.10 Tracking and Plan Performance: Track and report progress of Benefit Plans on a quarterly basis, coordinating with benefit providers to obtain relevant performance data. Provide analysis of Benefit Plan performance e.g., Health Care Plan – Premiums vs Claims. As needed, presents data to the County Legislature during open Legislative meetings.
- 4.11 Consultation: Provide upon request, consultation, and guidance to the county and individual benefit participants with respect to all Benefit Plans including, but not limited to: Health, Dental, Term Life, AD&D, LTD, EAP, Cafeteria Plan (Section 125), Whole Life, and Long-Term Care, etc.

- 4.12 The Successful Respondent will provide guidance with respect to Government mandates and compliance with all laws and regulations related to employee benefits (Health Care Reform, ERISA, COBRA, HIPAA, Section 125 administration, etc.).
- 4.13 The Successful Respondent will have access to carrier reporting and information tools (such as benchmarking reports) to facilitate and provide information on plan performance and to assist plan financial management function and cost/budget projections.
- 4.14 The Successful Respondent will provide cost effective, technological associate communication materials, and Summary Plan Documents and Certificate of Coverages. Will assist in summary of benefits and written communications regarding benefits throughout the year, during open enrollment, and as regulatory changes occur.
- 4.15 The Successful Respondent will assist the county in developing and implementing a comprehensive benefit plan communication infrastructure utilizing existing and emerging technologies encompassing communication between the County and vendors, the County and associates, and associate self-service.
- 4.16 Claim Mediation: Provide liaison services between the Human Resources Department Benefits Administrator point of contact and benefits contractors, including coordination or reporting and assistance resolving claims.
- 4.17 The Successful Respondent will assist with resolution of specific claims and/or issues, including but not limited to bill reconciliation, as needed and/or when requested by the County and/or individual plan members.
- 4.18 Reporting: Prepare and forward Federal regulatory information to Jackson County for review on a quarterly or annual basis, including data necessary for IRS Form 5500's as the County's Section 125 medical reimbursement plan exceeds 100 participants.
- 4.19 The Successful Respondent must agree to work collaboratively with any other consultants, or consulting firms and/or legal firms the County has contracted with for consulting and/or legal services.
- 4.20 The Successful Respondent will provide guidance, implementation, and support of the County's wellness initiatives. The Wellness program consists of a Wellness Coach, activities/programs, and incentives.
- 4.21 The Successful Respondent will develop and/or assist in developing and evaluating associate needs and satisfaction surveys as requested.
- 4.22 The Successful Respondent will provide their full range of services including, but not limited to, the following:
 - 4.22.1 Human Capital Services (Leave of Absence process and guidance, employee handbook compliance, performance management, Human Resources processes, HR compliance, and other Human Resources needs)
 - 4.22.2 Compensation Services (compensation guidance, relevant market data, develop a pay structure, resources to ensure market competitiveness, associate placement in pay structure).
 - 4.22.3 Specialized Recruitment (recruitment services for hard to fill positions and supplemental staffing).
 - 4.22.4 Additional services respondent can provide to Jackson County.
- 4.23 Jackson County may do business with MARCIT, Missouri Consolidated, or become Self-Insured and will not entertain a proposal, through a Broker, from MARCIT, Missouri Consolidated, or Self-Insurance. Jackson County prefers to deal directly with MARCIT, Missouri Consolidated, or Self-Insurance.
- 4.24 The Successful Respondent will provide pricing structure: consultant fee structure, fee-for-service. The fee schedule must be included, and explain why this is in the best interest of Jackson County.
- 4.25 The Consultant will ensure any healthcare plan will incorporate County-Owned TMC Hospital Network and TMC Advantage Plan.
- 4.26 The Successful Respondent will assist and direct County in process to move from partially funded to fully funded health plan.
- 4.27 The Successful Respondent will provide the lowest reasonable costs consistent with Jackson County financial objectives.

4.28 The Successful Respondent will provide a list of the services that will be included in their scope of services. Please indicate any services that may involve added costs.

4.29 The Successful Respondent will provide your firm's policy regarding compensation transparency.

5.0 PROPOSAL FORMAT

5.1 Submission of Bids: All Bids must be submitted online through the Bonfire Portal at <http://jacksongov.bonfirehub.com> Submission by any other method will not be accepted.

5.2 Expenses and costs incurred in the preparation of proposals in response to this Request for Proposal are the sole responsibility of the Respondent and shall not be reimbursed by the County.

5.3 To facilitate the evaluation of proposals, please see below;

5.3.1 All forms attached on Bonfire within this Request for Qualification package, filled out, signed, and notarized where necessary.

5.3.2 All forms contained in this Request for Proposal for evaluation purposes.

5.3.3 Description of Respondent's general background to include the following:

5.3.3.1 Year of inception and history,

5.3.3.2 Ownership structure,

5.3.3.3 Ability to provide the services.

5.3.4 References: Please include three examples of similar work done with other local municipalities; provide name and contact information.

5.3.5 Pricing: The Successful Respondent will provide proposed method of compensation for the following:

5.3.5.1 Fee-for-service

5.6.7 Contractor's Utilization Plan, documents are attached via Bonfire and must be completed. This is required, not suggested.

5.4 Failure to provide this information, organized in this manner, with the appropriate number of copies, may be grounds for the REJECTION of your proposal, or a reduction of Evaluation Criteria.

6.0 EVALUATION CRITERIA

6.1 An Evaluation Committee made up of Jackson County, Missouri personnel will evaluate all proposals and make recommendations. Jackson County, Missouri shall be the sole judge of the proposals submitted for this Request for Proposal and its decision shall be final.

6.2 The Evaluation Committee will consider various factors when evaluating the response to this Request for Proposal, including, but not limited to:

6.2.1	Responsiveness to the Request for Proposal	5 Points
6.2.2	Respondent's Proposal and Experience	45 Points
6.2.3	Respondent's References	10 Points
6.2.4	Respondent's Pricing	40 Points

6.3 Any evaluation criteria or weighting or criteria is used by the County as a tool to assist the County in selecting the best proposal(s) for the County. Evaluation scores or ranks alone do not create a right or expectation to a Contract with the County. Ultimately, the County may choose to contract with any Respondent, regardless of rank or score.

6.4 Proposals received become the property of the County and will not be returned.

7.0 CONTRACT NEGOTIATIONS

CBIZ

25-019

Pricing



CBIZ Price Proposal

CBIZ Employee Benefits Consulting Services
April 22nd, 2025

Matt Krull | Benefits Consultant

816.945.5222 | mkrull@cbiz.com

700 W 47th St Ste 1000, Kansas City, MO 64112

FEES & COMPENSATION



Our Partnership Guarantee

Our proposal reflects what's explicitly spelled out in your request, and you'll find the entire scope of benefits and human capital management services covered in our compensation structure. By working with one of the largest firms in the U.S. and with over 600 CBIZ employees located in the heart of Jackson County, you'll benefit from preferred-level service models from national and regional insurance carriers and other vendors, along with administrative and service efficiencies.

Pricing Proposal

As the scope of services requested from Jackson County have expanded to include Human Capital Management services a MBE and WBE partner, CBIZ would provide all the requested scope of services (except leave management) for a monthly fee of \$20,833 or \$250,000 annually. The fee would be broken down for the services listed below on a monthly structure. The MBE and WBE fees equate to 21% of the proposed fee structure, the Human Capital Management fees equate to 12%, and Benefits Consulting fee equate to roughly 67% of fees. ***Our proposed fee structure for just Employee Benefits Consulting .6% (six-tenths of one percent) of the total annual medical spend.***

• Employee Benefit Consulting	\$13,750/mo	(\$165,000 annually)
○ MBE/TICO Productions (9.5%)	\$1,979.17/mo	(\$23,750 annually)
○ WBE/Design Ranch (11.7%)	\$2,437.50/mo	(\$29,250 annually)
• HCM/Compensation Services/Policies/Recruitment	\$2,666.67*/mo	(\$32,000 annually)

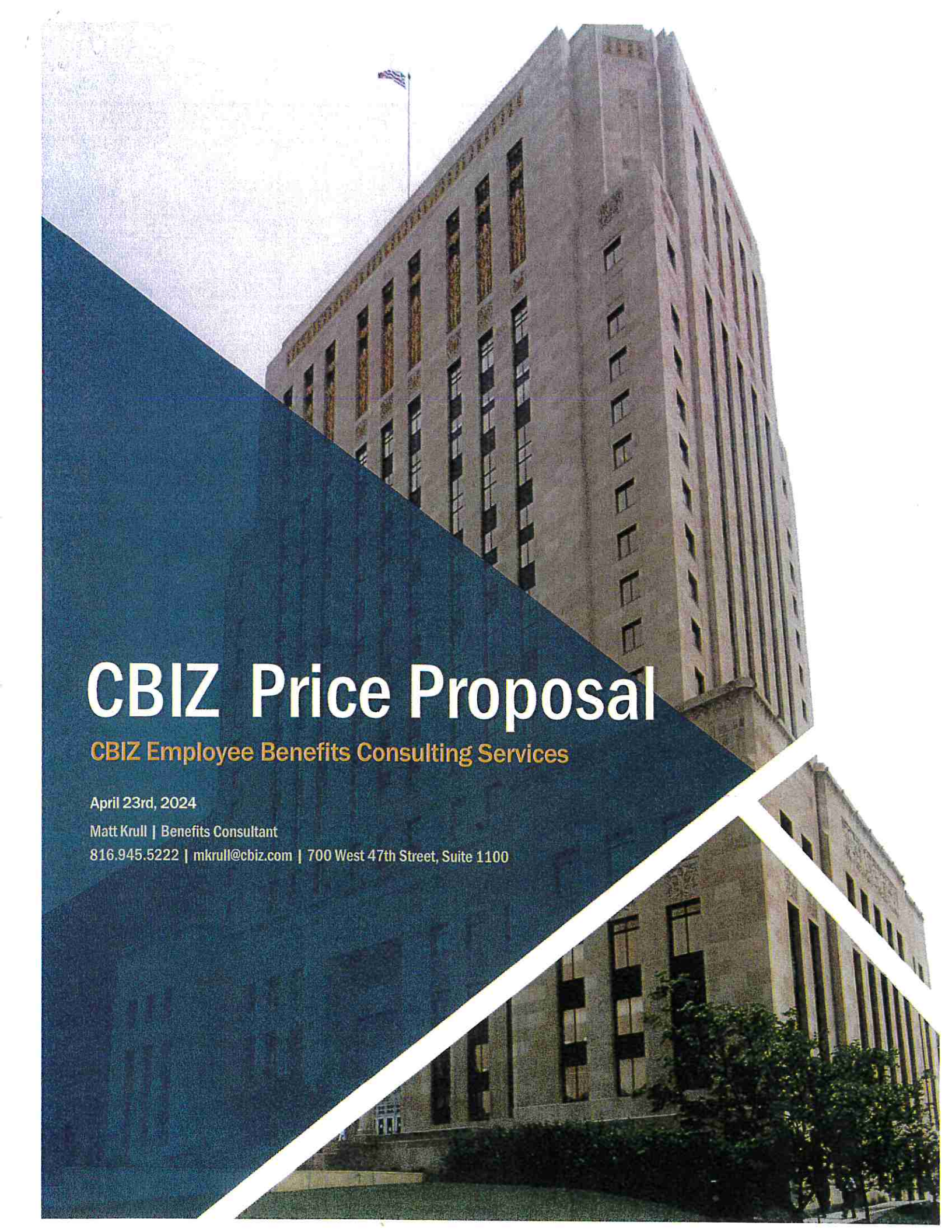
*Please note the HCM/Compensation Services/Policies Review/Recruitment could be scaled up or down in fees, depending on the work desired by the County. However, should this scope exceed \$32,000 annually, the county would be responsible for the balance. For example, we have attached a requested Compensation Proposal for Jackson County. This compensation proposal includes a custom compensation survey, external market analysis, pay structures, implementation analysis, and pay compression analysis. The fee for this proposal was \$42,350. Under the proposed arrangement, the \$32,000 annual fee could offset most of the cost of this proposal. If Jackson County would like to focus their Human Capital Management focus on Policy and Handbook review, \$32,000 annual fee could be dedicated to that particular project. We'd welcome discussions on a more detailed scope of work desired under the Human Capital sections of this RFP. The more information CBIZ has regarding the scope of work required will allow us to more accurately propose a fee for the work requested.

If Jackson County would remain with BlueKC, BlueKC would pay CBIZ an Administrative Service Fee (ASF). The ASF is an override paid above and beyond the fee the County would pay CBIZ. This cost is considered part of BlueKC's overhead and IS NOT included in the premiums or fees paid to Blue Cross Blue Shield of Kansas City by Jackson County. There is no financial impact to Jackson County.

CBIZ

24-024

Pricing



CBIZ Price Proposal

CBIZ Employee Benefits Consulting Services

April 23rd, 2024

Matt Krull | Benefits Consultant

816.945.5222 | mkrull@cbiz.com | 700 West 47th Street, Suite 1100

FEES & COMPENSATION

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Pricing Proposal

CBIZ proposes a monthly consulting fee of \$7,500 billed by the medical carrier. If Jackson County would remain with BlueKC in 2025, CBIZ would qualify for a Blue Chip Administrative Service Fee (ASF). The Blue Chip ASF **is not** included in the premiums or administrative fees paid to BlueKC by Jackson County, and there would be no financial impact to Jackson County under this arrangement. It is common practice for large public entities with BlueKC to structure their fee arrangement under the Blue Chip arrangement. This will allow Jackson County to take advantage of carrier paid compensation, keeping Jackson County's fee at a minimum.

If Jackson County were to switch medical carriers, our proposed monthly fee would remain at \$7,500 per month billed through the medical carrier. As a sign of our commitment to Jackson County and the partnership we have developed, we would propose no fee for July 2024. Our fee would then restart as scheduled on August 2024.

CBIZ

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Response Excerpts

5.21 The Successful Respondent will develop and/or assist in developing and evaluating associate needs and satisfaction surveys as requested.

CBIZ has provided and will continue to assist in conducting a variety of surveys if requested. Our most common surveys solicit associate feedback on current benefit options, satisfaction with carrier customer service, likelihood they may purchase an option if it were available, and the success of wellness programs. If Jackson County would like to conduct another survey, CBIZ will provide guidance on constructing and administering it to associates. We also have third party resources we may use should it be beneficial for a survey to come directly from CBIZ to your associates. CBIZ surveyed Jackson County's associate population earlier this year. The results of the survey can be used to help drive strategy.

5.22 The Successful Respondent will provide their full range of services including, but not limited to, the following:

5.22.1 Human Capital Services (Leave of Absence process and guidance, employee handbook compliance, performance management, Human Resources processes, HR compliance, and other Human Resources needs)

5.22.2 Compensation Service (compensation guidance, relevant market data, develop a pay structure, resources ensure market competitiveness, associate placement in pay structure)

5.22.3 Specialized Recruitment (recruitment services for hard to fill positions and supplemental staffing)

5.22.4 Additional services respondent can provide Jackson County.

CBIZ will continue to provide the services outlined throughout the entirety of question 5.22. A complete list of our currently provided services (and any services that may involve added costs) can be found in question 5.28.

Human Capital Management And More

Whether you want to empower associates to manage benefits or streamline the review process, CBIZ can help find a turnkey solution that seamlessly integrates with our benefits consulting and payroll services. CBIZ's HRIS technology can automate all HR-related activities, from applicant tracking and benefits enrollment to administration and workflow management, in one cloud-based portal.

If the County requires additional professional services, CBIZ can connect you to professionals in a variety of specializations within our organization. Each client is unique and together we will leverage resources to enhance your objectives.

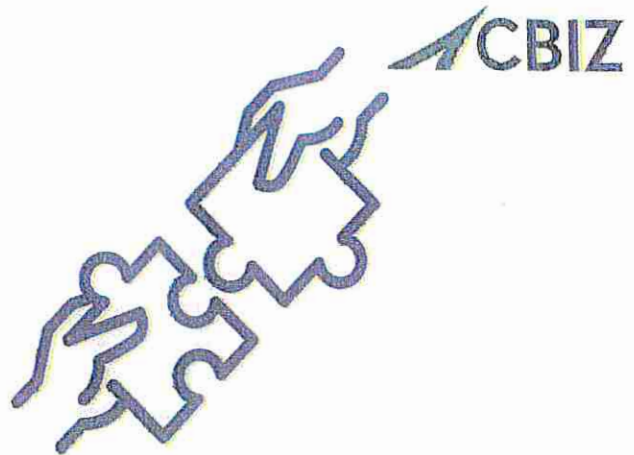
These services may require additional costs, to be negotiated upon determination of the scope of the projects. The following CBIZ services are offered regionally and nationally through a network of CBIZ professionals. These services are listed below and are outside of the Scope of Services detailed in this proposal:

5.28 The Successful Respondent will provide a list of the services that will be included in their scope of services. Please indicate any services that may be involved added costs.

CBIZ is proud to continue to offer the following within your Scope of Services:

Service	Cost
Ongoing Benefit Strategy & Management	
Day-to-Day Servicing & Issue Resolution	Included
Develop Contribution Strategies	Included
Evaluate New Programs & Trends	Included
Resolve Escalated Issues (Eligibility, billing, claims, etc.)	Included
Review Carrier Contracts	Included
Compliance Support	Included
Attend and Facilitate Benefits Committee Meetings	Included
Online Data Warehouse & Document Repository	Included
Plan Management	
3-Year Strategic Plan & Annual Service Timeline	Included
Cost Containment Strategy Review	Included
Annual Performance Review Meeting (including compensation disclosure)	Included
Renewal Support	
Detailed Pre-Renewal and Final Renewal Reports (including budget projections)	Included
Renewal Negotiations & Vendor Market Checks	Included
Vendor Review, Selection & Implementation	Included
Request For Proposals - Prepare / Distribute / Analyze / Present / Implement	Included
Ongoing Carrier Performance Management	Included
Financial Management & Reporting	
Standard Actuarial Support (Projecting financials and claims, pricing and reserve calculations, plan design modeling and alternative funding analysis, etc.)	Included
Data Analytics & Plan Forecasting	Included
Health Innovations Practice Trends & Support	Included
Ongoing Pharmacy Consulting by National Practice Team	Included
Monthly Financial Overview and Claims Dashboard	Included
Benchmarking Comparison & Analysis	Included
Associate Contribution Strategy Development	Included
More Robust Self-Funded Actuarial Support (Dedicated Financial Analyst, Monte Carlo Analysis, Funding Rate Development, etc.)	Included
Eligibility Audits and Claim Audits	Included
Acquisition Support	
Benefit Acquisition Due Diligence	Included
Onboarding New Acquisitions	Included
Comprehensive Checklist & Process	Included

- Business Valuation Services
- Executive Financial Services
- Human Capital Advisory Services
- Mergers and Acquisition Services
- Payroll Services
- Retirement Plan Services
- Risk Management & Specialty Insurance
- Accounting, Tax & Advisory Services
- Technology Solutions
- Executive Recruiting
- Talent & Compensation Consulting Services



[Click here to learn more about the additional lines of service CBIZ has to offer.](#)

5.23 Jackson County may do business with MARCIT, Missouri Consolidated, or become Self-Insured and will not entertain a proposal, through a Broker, from MARCIT, Missouri Consolidated, or Self-Insurance. Jackson County prefers to deal directly with MARCIT, Missouri Consolidated, or Self-Insurance.

CBIZ continues to support this request and will work with all vendors in place or identified as preferred by the County.

5.24 The Successful Respondent will provide pricing structure: consultant fee structure, fee-for-service. The fee schedule must be included, and explain why this is in the best interest of Jackson County.

As the scope of services requested from Jackson County have expanded to include Human Capital Management services a MBE and WBE partner, CBIZ would provide all the requested scope of services (except leave management) for a monthly fee of \$20,833 or \$250,000 annually. The fee would be broken down for the services listed below on a monthly structure. The MBE and WBE fees equate to 21% of the proposed fee structure, the Human Capital Management fees equate to 12%, and Benefits Consulting fee equate to roughly 67% of fees. ***Our proposed fee structure for just Employee Benefits Consulting .6% (six-tenths of one percent) of the total annual medical spend.***

• Employee Benefit Consulting	\$13,750/mo	(\$165,000 annually)
○ MBE/TICO Productions (9.5%)	\$1,979.17/mo	(\$23,750 annually)
○ WBE/Design Ranch (11.7%)	\$2,437.50/mo	(\$29,250 annually)
• HCM/Compensation Services/Policies/Recruitment	\$2,666.67*/mo	(\$32,000 annually)

*Please note the HCM/Compensation Services/Policies Review/Recruitment could be scaled up or down in fees, depending on the work desired by the County. However, should this scope exceed \$32,000 annually, the county would be responsible for the balance. For example, we have attached a requested Compensation Proposal for Jackson County. This compensation proposal includes a custom compensation survey, external market analysis, pay structures, implementation analysis, and pay compression analysis. The fee for this proposal was \$42,350. Under the proposed arrangement, the \$32,000 annual fee could offset most of the cost of this proposal. If Jackson County would like to focus their Human Capital Management focus on Policy and Handbook review, \$32,000 annual fee could be dedicated to that particular project. We'd welcome discussions on a more detailed scope of work desired under the Human Capital

CBIZ

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Response Excerpts

4.22 The Successful Respondent will provide to their full range of services including, but not limited to, the following:

4.22.1 Human Capital Services (Leave of Absence process and guidance, employee handbook compliance, performance management, Human Resources processes, HR compliance, and other Human Resources needs)

4.22.2 Compensation Services (compensation guidance, relevant market data, develop a pay structure, resources to ensure market competitiveness, associate placement in pay structure).

4.22.3 Specialized Recruitment (recruitment services for hard to fill positions and supplemental staffing).

4.22.4 Additional services respondent can provide to Jackson County.

CBIZ will continue to provide the services outlined throughout the entirety of question 4.22. A complete list of our currently provided services (and any services that may involve added costs) can be found in question 4.28

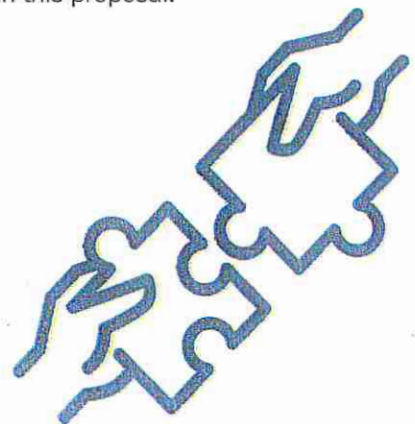
HUMAN CAPITAL MANAGEMENT AND MORE

Whether you want to empower employees to manage benefits or streamline the review process, **CBIZ** can help find a turnkey solution that seamlessly integrates with our benefits consulting and payroll services. **CBIZ's** HRIS technology can automate all HR-related activities, from applicant tracking and benefits enrollment to administration and workflow management, in one cloud-based portal.

If the County requires additional professional services, CBIZ can connect you to professionals in a variety of specializations within our organization. Each client is unique and together we will leverage resources to enhance your objectives.

These services may require additional costs, to be negotiated upon determination of the scope of the projects. The following CBIZ services are offered regionally and nationally through a network of CBIZ professionals. These services are listed below and are outside of the Scope of Services detailed in this proposal:

- Business Valuation Services
- Executive Financial Services
- Human Capital Advisory Services
- Mergers and Acquisition Services
- Payroll Services
- Retirement Plan Services
- Risk Management & Specialty Insurance
- Accounting, Tax & Advisory Services
- Technology Solutions
- Executive Recruiting
- Talent & Compensation Consulting Services



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4.28 The Successful Respondent will provide a list of the services that will be included in their scope of services. Please indicate any services that may involve added costs.

CBIZ is proud to continue to provide Jackson County the following services:

Service	Cost
Ongoing Benefit Strategy & Management	
Day-to-Day Servicing & Issue Resolution	Included
Develop Contribution Strategies	Included
Evaluate New Programs & Trends	Included
Resolve Escalated Issues (Eligibility, billing, claims, etc.)	Included
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Compliance Support	Included
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Renewal Support	
Detailed Pre-Renewal and Final Renewal Reports (including budget projections)	Included
Renewal Negotiations & Vendor Market Checks	Included
Vendor Review, Selection & Implementation	Included
Request For Proposals – Prepare / Distribute / Analyze / Present / Implement	Included
Ongoing Carrier Performance Management	Included
Customer Advocacy	
Guaranteed Response to all Client Voicemail and E-Mail Communications within 24 hours	Included
Personalized HIPPA Compliant Assistance to Resolve Elevated Claim Issues	Included
Direct Line of Contact to Every Carrier Through CBIZ Client Service Team	Included
Financial Management & Reporting	
Standard Actuarial Support (Projecting financials and claims, pricing and reserve calculations, plan design modeling and alternative funding analysis, etc.)	Included
Data Analytics & Plan Forecasting	Included
Health Innovations Practice Trends & Support	Included
Ongoing Pharmacy Consulting by National Practice Team	Included
Monthly Financial Overview and Claims Dashboard	Included
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Acquisition Support	
Benefit Acquisition Due Diligence	Included
Onboarding New Acquisitions	Included

Comprehensive Checklist & Process	Included
Employee Communications Resources	
Custom Benefit Guide w/ FlippingBook Engagement Technology	Included
Attend & Coordinate Carrier Attendance at Employee Meetings	Included
Custom Open Enrollment Presentation for Employee Meetings	Included
Educational Video Library Access & Custom Open Enrollment Video	Included
Communication Strategy Development	Included
HR Benefits Administration Technology Review and Recommendation	Included
Wellbeing & Engagement Consulting	
Access To Wellbeing Consultants	Included
Initial Opportunity Assessment & Evaluation	Included
Management of Resources Available to Support Wellbeing Program	Included
Ongoing Strategy Development	Included
Vendor Review, Selection & Implementation	Included
Development of Annual Scorecard	Included
Compliance & ACA Reporting	
In-house Regulatory Affairs Team	Included
Ongoing Compliance Guidance & Health Care Reform Education	Included
Enrollment & Administration Compliance Support	Included
ACA Compliance Assistance & Resolution	Included
Ongoing Webinars & Regular Communications	Included
5500 Preparation	Included
Additional HR Support	
HR assistance, templates, support through ThinkHR	Included
Drafting Employee Handbooks, Compensation Consulting or Other HR projects	CBIZ could provide a mutually agreed subsidy towards select projects
TCOffers, a total compensation offer tool for prospective employees	Available at an additional fee

4.29 The Successful Respondent will provide your firm's policy regarding compensation transparency.

At CBIZ, we believe that strong partnerships are built on a foundation of transparency and mutual trust. As such, we adhere to a partnership guarantee that eliminates the possibility of clients encountering unexpected fees or hidden expenses. This yields a relationship with no surprises. In addition, our dedication to meeting the unique needs and preferences of each client extends into our payment options. Our team has the flexibility to work on a direct-fee basis or under a commission agreement, depending on the scope of your project. CBIZ will annually disclose our compensation and can be requested at any time by the County as well.

Our Partnership Guarantee

Our proposal reflects what's explicitly spelled out in your request, and you'll find the entire scope of benefits consulting services covered in our compensation structure. By working with one of the largest firms in the U.S. and with over 600 CBIZ employees located in the heart of Jackson County, you'll benefit from preferred-level service models from national and regional insurance carriers and other vendors, along with administrative and service efficiencies.

4.23 Jackson County may do business with MARCIT, Missouri Consolidated, or become Self-Insured and will not entertain a proposal, through a Broker, from MARCIT, Missouri Consolidated, or Self-Insurance. Jackson County prefers to deal directly with MARCIT, Missouri Consolidated, or Self-Insurance.

CBIZ continues to support this request and will work with all vendors in place or identified as preferred by the County.

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If Jackson County were to switch medical carriers, our proposed monthly fee would remain at \$7,500 per month billed through the medical carrier. As a sign of our commitment to Jackson County and the partnership we have developed, we would propose no fee for July 2024. Our fee would then restart as scheduled on August 2024.

4.25 The Consultant will ensure any healthcare plan will incorporate County-Owned TMC Hospital Network and TMC Advantage Plan.

CBIZ will continue to fully support this request.

4.26 The Successful Respondent will assist and direct County in process to move from partially funded to fully funded health plan.

CBIZ has the team, tools, and resources to help the County evaluate and implement all funding options. As Jackson County evaluates its current Cost Plus arrangement with BlueKC, it will be critical to have a Consultant with a strong actuarial department, pharmacy practice, and stop loss partnership. CBIZ has recently assisted Kansas City Public Schools and Kansas City Kansas Public Schools transition from a Cost Plus funding arrangement to a self-funded arrangement.

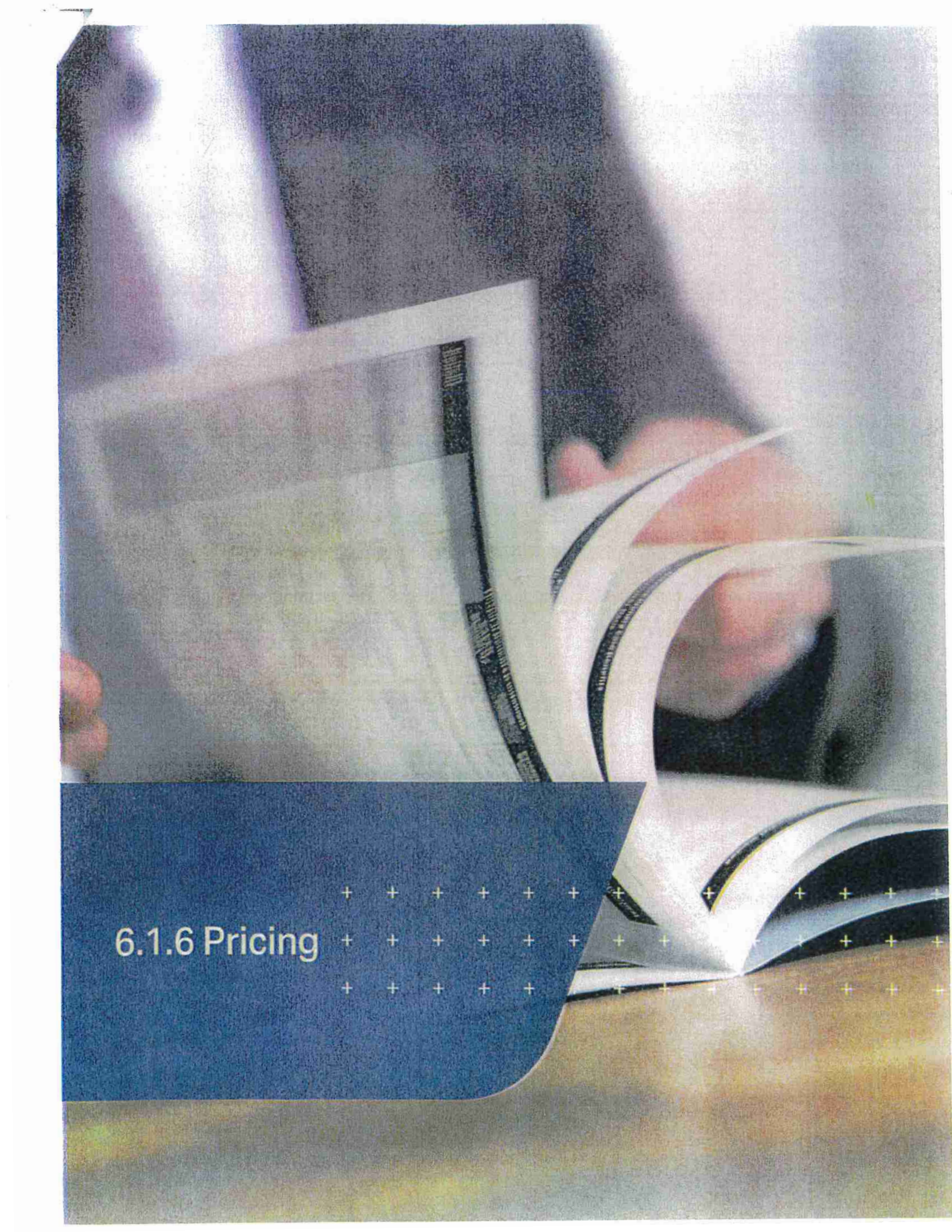
4.27 The Successful Respondent will provide the lowest reasonable costs consistent with Jackson County financial objectives.

CBIZ will continue to work with Jackson County in providing the lowest reasonable costs consistent with their financial objectives regarding our fee for service and the insurance plans we manage on behalf of the County.

IMA

25-019

Pricing



6.1.6 Pricing



6.1.6.1. The Successful Respondent will provide proposed method of compensation for the following: Fee-for-Service

An advantage of IMA's private ownership structure is that it allows us complete flexibility in designing a compensation package that is fair to our client and adequately compensates us for our work to ensure resources are fully available and deployed. Our goal is to see that our clients have full access to the complete range of services and resources we offer and engage in open communication without concerns of accumulating fees.

- + **Transparency** – We believe it is important for our clients to understand and see the compensation we are making on behalf of the work we do. Traditionally, these amounts are buried in premiums charged to the insured. Breaking these out of the premiums provides transparency to the client and we feel you will never wonder why we promoted one insurance carrier over another—our interests will fully align.
- + **Evaluation** – Typically, we evaluate our fees annually; this puts increased focus on making sure our team is engaged and committed the entire year. Additionally, it provides an avenue and opportunity to discuss the work done over the past year.

The IMA consulting fee for the scope of services outlined in this proposal is \$85,000 annually to be payable on a monthly, quarterly, or annual basis per the county's preference. Our proposal assumes existing broker compensation built into current benefit plans provided continue with no change. We understand this doesn't include Blue Chip as IMA is not a Blue-Chip broker and remains agnostic to carrier recommendations. Our proposed fee included in the RFP is based on our understanding of the County's request for services. We are open to discussion and are willing to negotiate/discuss variations in solving the County's needs.

Our commitment to you is that our fees will be competitive and allow us to provide you with industry-leading insurance and risk management consulting. We do not have the pressure of publicly traded or private equity owned ROI mandates—so our consulting fees are competitive. Our preference is a flat fee-for-service as we like the transparency of this method offers and the alignment with our clients and their needs.