

*RCR*

R. 21636



**FIRST AMENDMENT TO SERVICES AGREEMENT**

THIS FIRST 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

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 the Agreement will renew for a Renewal Term effective July 1, 2024, and will remain in effect for a twelve (12) month period thereafter. Notwithstanding anything stated in Section 13 of the Agreement, the parties agree that the Agreement will not renew for an additional Renewal Term at the completion of this current Renewal Term and the Agreement will terminate on June 30, 2025, unless otherwise agreed to at the mutual agreement of the parties.

II. Addendum A to the Agreement will be deleted in its entirety and the new Addendum A, attached hereto shall be inserted in its place and made a part of the Agreement.

III. Addendum B to the Agreement will be deleted in its entirety and the new Addendum B, attached hereto, shall be inserted in its place and made a part of the Agreement.

IV. The effective date of this First Amendment is July 1, 2024.

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

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

Employer  
Jackson County, Missouri  
By: *Michelle Chisler*  
Title: *Dir of. H.R.*  
Date: *8/20/2024*

CBIZ Benefits & Insurance Services, Inc.  
DocuSigned by:  
By: *Nancy M. Mellard*  
20E7129A902840D..  
Title: Executive Vice President  
Date: 8/16/2024

APPROVED AS TO FORM  
*[Signature]*  
County Counselor

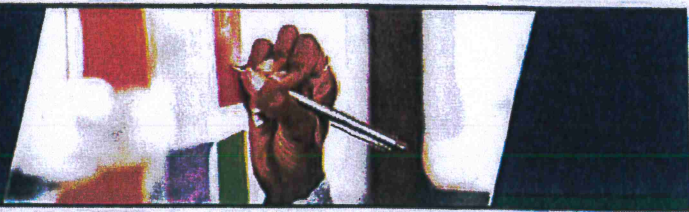
ATTEST:  
*[Signature]*  
Clerk of the County Legislature

**FILED**

AUG 26 2024

Revised 8/2024

MARY JO SPINO  
COUNTY CLERK



# ADDENDUM A | SCOPE OF SERVICES

## SCOPE OF SERVICES

### Innovative Employee Benefits Solutions

Leading the employee benefits industry to protect your employee investment today and in the future.

### Plan Management and Renewals

Monitor management and renewals with 3-year strategies, timelines, benchmarking, and key milestones.



Financial overview and monthly claims review



3-year strategic plan and annual timeline Renewal strategy



Annual Performance Review



Customized Dashboards



Carrier and vendor evaluation implementation



Day to day service support

### Financial Management and Actuarial Services

Access factors driving plan costs using financial projections and claims analysis.



Benchmarking & Data Analytics



Monthly Financial Reporting



Employee Contribution strategies and calculations



Funding projections and modeling capabilities





# SCOPE OF SERVICES

## Compliance and Regulatory Affairs

Stay compliant with expert benefits, payroll, finance, tax, and regulatory assistance.

## Communication and Education

Improve employee understanding by providing consistent benefits messaging throughout the year.



In-house regulatory affairs attorney and staff



Creation of strategic custom communications plan



Monitor and communicate on relevant state and federal legislation



Coordination of enrollment resources



Consistent compliance and Health Care Reform education materials



Ongoing creation of communication deliverables



Enrollment and administration compliance support



Vendor and technology support

## Wellbeing Solutions

Engage employees and impact benefits costs with data-driven wellbeing initiatives.

- Wellbeing communication and engagement strategy
- Ongoing tactical recommendations
- Data utilization tools and benchmarking
- Monitor and measure results

## Pharmacy Benefit Plan Management

Tackle rising pharmacy costs with modeling and plan analysis

- Pharmacy Benefit Management procurement and marketing
- Financial and clinical pharmacy guidance
- Rx claims monitoring



**ADDENDUM B  
FEE FOR SERVICES**

Employer agrees to pay CBIZ a fixed fee in equal monthly payments of Seven Thousand Dollars (\$7,000.00) each, which will be billed through the medical carrier.

General Disclosure for All Clients

CBIZ has been and will continue to be committed to acting in our client's best interest by providing services and products that meet our clients' needs as communicated to CBIZ. From time to time, CBIZ may participate in agreements with one or more insurance companies or third party vendors, in connection with the insurance related transactions, to receive additional compensation or consideration. These compensation arrangements are provided to CBIZ as a result of the performance and expertise by which products and services are provided to the client and may result in enhancing CBIZ's ability to access certain markets and services on behalf of CBIZ clients. More information regarding these agreements and the consideration received pursuant to these agreements is available upon written request.

Notwithstanding the foregoing, CBIZ will not receive any additional compensation based on Employer sponsored policies and plans except CBIZ would receive an Administrative Service Fee (ASF) if Blue Cross Blue Shield Kansas City ("BlueKC") is the medical carrier for the period of this Agreement. The ASF is an override paid by BlueKC as part of their overhead. The ASF is not included in the premiums or fees paid to BlueKC by Jackson County and has no financial impact to Jackson County.