



Jackson County, Missouri

Request for Legislative Action

REQUESTED MEETING DATE: _____ **SPONSOR:** Megan L. Marshall

To be completed by the County Counselor's Office:

NUMBER: 21636 **ASSIGNED MEETING DATE:** 05/20/2024

STAFF CONTACT: Michelle Chrisman **PHONE:** 816-881-1204

EMAIL: mchrisman@jacksongov.org

DEPARTMENT: Human Resources

TITLE: Awarding a twelve-month term and supply contact with two twelve-month options to extend to bring the entire contract on fiscal boundaries for the furnishing of an Employee Benefits Consultant on the County's health, life, dental, vision, and welfare benefits to use County-wide, to CBIZ Benefits of Kansas City, MO under the terms and conditions of Request for Proposal No. 24-024, at no cost to the County.

SUMMARY:

The Human Resources Department requires a contract for an Employee Benefits Consultant for the County's health, life, dental, vision, and welfare benefits to complete formal bids on all benefits, assist in selecting and negotiating with vendors, providing analytical data, strategic planning, communication, and education of benefits to associates and provide additional services in Human Capital Management, Compensation Services, and additional Human Resource services as needed. The Purchasing Department issued Request for Proposal 24-024 in response to those requirements. Four hundred and seven (407) bid notifications were issued, forty-eight (48) document takers and four (4) bids were received. The committee consisted of associates from Parks + Rec, Human Resources, and the Corrections department. The analysis of the scoring and pricing of respondents is outlined in Exhibit A.

All respondents were requested to submit a Fee-for-Service proposal. CBIZ's consulting fee will remain the same and would qualify for a Blue Chip Administrative Service Fee (ASF). The Blue Chip ASF is not included in the premiums or administrative fees paid by BlueKC by Jackson County and there will be no financial impact to Jackson County. If there is a switch with medical carriers, monthly fee will remain at \$7,500 and billed through the carrier.

Pursuant to Section 1054.6 of the Jackson County Code, the Human Resources Department recommends the award of the contract for the furnishing of Employee Benefits Consultant to CBIZ as the best proposal received.

FINANCIAL IMPACT: NO
YES

Amount	Fund	Department	Line-Item Detail
_____	_____	_____	_____

ACTION NEEDED: AWARD A CONTRACT

ATTACHMENT(S): Recommendation Letter RFP 24-024
1-FINAL 2024 CBIZ Response to Jackson County Missouri
1-Jackson County Missouri Pricing Document
24-024 Employee Benefits Consulting Services - Executive Summary



Scoring Summary

Active Submissions

	Total	A - Responsiveness	A-1 -	B - Proposal and Experience	B-1 -
Supplier	/ 100 pts	/ 5 pts	/ 5 pts	/ 45 pts	/ 45 pts
CBIZ Benefits and Insurance Services, Inc	97.75 pts	5 pts	5 pts	43.75 pts	43.75 pts
Twin Lakes Insurance Agency	54.25 pts	4 pts	4 pts	17.5 pts	17.5 pts
Garry & Associates Insurance Agency, Inc	48.5 pts	3.75 pts	3.75 pts	21.25 pts	21.25 pts
ABD Talent LLC	41 pts	4 pts	4 pts	11.25 pts	11.25 pts



	C - References	C-1 -	D - Pricing	D-1 -	E - Purchasing Scoring
Supplier	/ 10 pts	/ 10 pts	/ 40 pts	/ 40 pts	/ 0 pts
CBIZ Benefits and Insurance Services, Inc	9.75 pts	9.75 pts	39.25 pts	39.25 pts	0 pts
Twin Lakes Insurance Agency	5.25 pts	5.25 pts	27.5 pts	27.5 pts	0 pts
Garry & Associates Insurance Agency, Inc	6 pts	6 pts	17.5 pts	17.5 pts	0 pts
ABD Talent LLC	2 pts	2 pts	23.75 pts	23.75 pts	0 pts



	E-1 - Purchasing Review
Supplier	Pass/Fail
CBIZ Benefits and Insurance Services, Inc	Pass
Twin Lakes Insurance Agency	Pass
Garry & Associates Insurance Agency, Inc	Pass
ABD Talent LLC	Pass



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

COVER LETTER

April 23rd, 2024

Jackson County, Missouri
415 East 12th Street
Kansas City, Missouri 64106

Dear members of the evaluation committee,

Attracting and retaining a skilled workforce relies on your ability to provide competitive, comprehensive benefits packages. At CBIZ Employee Benefits, we understand the stakes are high, and we're here to streamline the process of selecting the benefits that best fit your employees' needs. CBIZ is uniquely positioned with dedicated teams and dedicated focus with Public Entities. CBIZ public entity practice is second to none in the Kansas City market.

The growing complexity of the insurance industry necessitates a team that can offer the best of both worlds: a fresh perspective backed by extensive experience. CBIZ strikes a balance between these seemingly contradictory qualities, providing each client with innovative solutions supported by the depth of knowledge needed to navigate the shifting benefits landscape.

Our approach harnesses the power of national resources paired with personal, local service. Each member of our team stands ready to solve your most critical business concerns, providing industry-leading solutions to mitigate risk and reduce costs while enhancing employee communication, engagement, retention and more.

We maintain our competitive advantage by:

- Performing assessments of **cost, compliance, and administration** to identify opportunities and mitigate risks
- Leveraging **data analytics** to accurately project costs and facilitate budgetary forecasting
- Employing dynamic communication methods to **enhance the employee experience**
- Crafting customized **multi-year strategies** that align with your specific objectives
- Optimizing your benefits budget by **minimizing uncertainty** and maximizing value

Our team is excited about the opportunity to build on the success we have accomplished over the past 21 months with Jackson County. We look forward to continuing to explore solutions and services that will help you attract, retain and engage your most important asset — your people.

Best regards,



Jeff Fosnough



Carolyn Watley



Matt Krull

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REQUIRED FORMS

AFFIDAVIT

STATE OF Missouri)
) SS.
COUNTY OF Jackson)

Nancy M. Mellard of the city of Kansas City
County of Jackson State of Missouri being duly sworn on her or his oath, deposes and says,

1. That I am the Executive Vice President (Title of Affiant) of CBIZ Benefits & Insurance Services, Inc. (Name of Bidder) and have been authorized by said Bidder to make this Affidavit upon my best information and belief, after reasonable inquiry as to the representations herein.
2. No Officer, Agent or Employee of Jackson County, Missouri is financially interested directly or indirectly what Bidder is offering to sell to the County pursuant to this Invitation (though no representation is made regarding potential ownership of publicly traded stock of bidder).
3. If Bidder were awarded any contract, job, work or service for Jackson County, Missouri, no Officer, Agent or Employee of the County would be interested in or receive any benefit from the profit or emolument of such.
4. Either Bidder is duly listed and assessed on the tax rolls of Jackson County, Missouri and is not delinquent in the payment of any taxes due to the County or Bidder did not have on December 31, 2023, any property subject to taxation by the County and if bidder is duly listed and assessed on the tax rolls of Jackson County, Missouri, bidder agrees to permit an audit of its records, if requested by the Jackson County Director of Assessment, as they relate to the assessment of Business Personal Property.
5. Bidder has not participated in collusion or committed any act in restraint of trade, directly or indirectly, which bears upon anyone's response or lack of response to the Invitation.
6. Bidder certifies and warrants that Bidder or Bidder's firm/organization is not listed on the General Services Administration's Report of Debarred and/or Suspended Parties, or the State of Missouri and City of Kansas City, Missouri Debarment List.
7. Bidder certifies and affirms its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services.
8. Bidder certifies and affirms that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services.

CBIZ Benefits & Insurance Services, Inc. (Name of Bidder)

By: *Nancy M. Mellard* (Signature of Affiant)

Nancy M. Mellard

Executive Vice President (Title of Affiant)

Subscribed and sworn to before me this 9th day of April, 20 24

Krislin Fenner
NOTARY PUBLIC



My Commission Expires: April 18, 2026

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA

The undersigned acknowledges receipt of Addenda through and including numbers _____ and that this Bid is submitted in accordance with information, instructions, and stipulations set forth therein.



Signature of Respondent Nancy M. Mellard - Executive Vice President

4/9/2024

Date

CBIZ Benefits & Insurance Services, Inc.

Company Name

700 W. 47th Street, Suite 1100

Address

Kansas City, MO 64112

City, State, and Zip

816-945-5500

Phone



OFFICE OF THE COUNTY AUDITOR
COMPLIANCE REVIEW OFFICE
 415 E 12TH STREET, 2ND FLOOR
 KANSAS CITY, MISSOURI 64106

(816) 881-3302
 FAX (816) 881-3340
 CRO@JACKSONGOV.ORG
 WWW.JACKSONGOV.ORG/AUDITOR

**JACKSON COUNTY, MISSOURI
 CONTRACTOR UTILIZATION PLAN**

Bid/RFP/RFQ Number: 24-024
 Bid/RFP/RFQ Title: Employee Benefits Consulting Service
 Contracting Department: Human Resources
 Respondent: _____

I, Nancy M. Mellard, of lawful age and upon my oath state as follows:

1. This Affidavit is made for the purpose of complying with the provisions of the MBE/WBE/VBE submittal requirements on the above Bid/RFP/RFQ and the MBE/WBE/VBE Program and is given on behalf of the Respondent listed above. It sets out the Respondent's plan to utilize MBE and/or WBE and/or VBE prime and subcontractors on the awarded contract.

The goals set by Jackson County, Missouri are:

_____% MBE ____% WBE ____% VBE

2. Bidder stipulates that it will utilize a minimum of the following percentages of MBE/WBE/VBE participation in the above bid:

0 % MBE ____% WBE ____% VBE

3. The following are the MBE/WBE/VBE Contractors to be utilized on the above-named solicitation. Respondent maintains that it either has a formal contract or a conditional contract contingent upon award.

Please note:

- a. If Bidder is a certified MBE, WBE, or VBE firm, it may list itself in the appropriate area below.
- b. No contractor may be listed under multiple categories below regardless of certifications.

INTERNAL USE ONLY	
CUP RECEIVED: _____	CUP APPROVED: _____
GFE RECEIVED: _____	GFE APPROVED: _____
CUP REVISED: _____	REVISION APPROVED: _____
APPROVED GOALS: _____ MBE _____ WBE _____ VBE	
RES/ORD: _____	AMT AWARDED: _____
NOTES:	

MBE SUBCONTRACTORS

MBE SUBCONTRACTORS

Description

Bidder Response

Description		Bidder Response	
A.	MBE Firm: TBD	Have contacted COR	INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub A Contract Value: \$
	Address line 1:	Continuing search and	
	Address line 2-include County:	inquiries for MBE firm.	
	Telephone Number:	Please see below for	
	President/Owner:	Diversity Pledge and	
	Email Address:	Memorandum of	
	Certifying Agency	Understanding with	
	Expiration Date of Certification:	Black Chamber of	
	Scopes of Work Utilized:	Commerce of Greater	
Percentage of Contract Awarded:	Kansas City.		
B.	MBE Firm:		INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub B Contract Value: \$
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
Percentage of Contract Awarded:			
C.	MBE Firm:		INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub C Contract Value: \$
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
		TOTAL MBE VALUE	\$

Add Additional Pages as Necessary

WBE SUBCONTRACTORS

Description

Bidder Response

A.	WBE Firm: TBD	Have contacted COR..	INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub A Contract Value: \$
	Address line 1:	Continuing search and	
	Address line 2-include County:	inquiries for WBE firm.	
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		

B.	WBE Firm:		INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub B Contract Value: \$
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		

C.	WBE Firm:		INTERNAL USE ONLY Certifying Agency: _____ KCMO _____ State of MO Approved: Y N Sub C Contract Value: \$
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
		TOTAL WBE VALUE	\$

Add Additional Pages as Necessary

VBE SUBCONTRACTORS

Description

Bidder Response

	Description	Bidder Response									
A.	VBE Firm: TBD	Have contacted COR.	INTERNAL USE ONLY								
	Address line 1:	Continuing search and		Certifying Agency: KCMO State of MO							
	Address line 2-include County:	inquiries for VBE firm..			Approved: Y N						
	Telephone Number:					Sub A Contract Value:					
	President/Owner:						\$				
	Email Address:										
	Certifying Agency										
	Expiration Date of Certification:										
	Scopes of Work Utilized:										
Percentage of Contract Awarded:											
B.	VBE Firm:			INTERNAL USE ONLY							
	Address line 1:				Certifying Agency: KCMO State of MO						
	Address line 2-include County:					Approved: Y N					
	Telephone Number:						Sub B Contract Value:				
	President/Owner:							\$			
	Email Address:										
	Certifying Agency										
	Expiration Date of Certification:										
	Scopes of Work Utilized:										
Percentage of Contract Awarded:											
C.	VBE Firm:				INTERNAL USE ONLY						
	Address line 1:					Certifying Agency: KCMO State of MO					
	Address line 2-include County:						Approved: Y N				
	Telephone Number:							Sub B Contract Value:			
	President/Owner:								\$		
	Email Address:										
	Certifying Agency										
	Expiration Date of Certification:										
	Scopes of Work Utilized:										
	Percentage of Contract Awarded:										
	TOTAL VBE VALUE	\$									

Add Additional Pages as Necessary

Add Additional Pages as Necessary

ACKNOWLEDGMENT

Respondent acknowledges that it is responsible for considering the effect that any change order and/or amendments changing the total contract amount may have on its ability to meet or exceed the subcontractor participation goals.

Good Faith Effort:

Respondent further acknowledges that it is responsible for submitting a Good Faith Effort Form if it will be unable to meet the participation goals. A Good Faith Effort Form documents the efforts a respondent puts forth to achieve the MBE and/or WBE and/or VBE goals on a project. Simply stating that goals cannot be met is not considered sufficient.

Contractor Modification Form:

If, at any point during the life of the awarded contract, the contractor needs to substitute an approved subcontractor a Contractor Modification Form must be submitted to the Compliance Review Office.

Any Good Faith Effort or Contractor Modification Form must be approved by the Compliance Review Office.

Contact the Compliance Review Office for assistance or to request forms.

I hereby certify that I am authorized to make this Affidavit on behalf of the Respondent named below and who shall abide by the terms set forth herein. I acknowledge that the assigned values determined by this CUP shall be enforceable under the contract terms and conditions.

Respondent Primary Contact: Nancy M. Mellard - CBIZ Benefits & Insurance Services, Inc.
Title: Executive Vice President
Date: 4/9/2024

Subscribed and sworn to before me this 9th day of April, 2024.

My Commission Expires: 4/18/2026

[Signature]

Notary Public (Attach corporate seal if applicable)



For questions on this form please contact:

Compliance Review Office 816-881-3302 CRO@jacksongov.org



OFFICE OF THE COUNTY AUDITOR

COMPLIANCE REVIEW OFFICE

415 E 12TH STREET, 2ND FLOOR
KANSAS CITY, MISSOURI 64106

(816) 881-3302
FAX (816) 881-3340
CRO@JACKSONGOV.ORG
WWW.JACKSONGOV.ORG/AUDITOR

GENERAL CONTRACTOR GOOD FAITH EFFORTS CHECKLIST

General Contractor: CBIZ Benefits & Insurance Services, inc. Project: _____

Representative: Matt Krull Title: Producer

Phone: 816-945-5222 Email: mkrull@cbiz.com

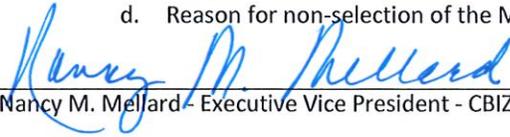
When required by the Compliance Review Office (CRO), the General Contractor must complete this checklist within the time frame provided. Check one or more of the following, documentation evidencing each checked item must be provided.

- Requested in writing, assistance of the Compliance Review Office with respect to efforts to promote the utilization of MBE/WBEs and acted upon the CRO's recommendations. Other appropriate organizations may be used to identify qualified M/WBE's. (County Code Section 645.6)
- Solicited in writing proposals from certified MBE/WBEs in sufficient time to allow MBE and WBE firms to participate effectively (in any event no later than 15 calendar days prior to the utilization of any Vendor or Construction Services for each project, setting forth in sufficient detail a description of the Project, identification of the vendor or contractor, the amount and scope of work to be performed, and the time frame of performance, so that meaningful proposals may be submitted sufficiently in advance to be considered prior to awarding contracts. (County Code Section 645.1)
- Advertised in Minority/Women's Trade Association Newsletters and/or minority owned media in sufficient time to allow MBE and WBE firms to participate effectively (in any event no later than at least 15 calendar days prior to the utilization of any Vendor or Construction Services for each Project, identifying specific opportunities at least equal to the Utilization Goal for MBE/WBE utilization specified for the contract and maintained a log or copies of such ads showing the date of publication and identifying the publication. (County Code Section 645.1)
- Adequately segmented the work in the bid or request for proposal documents or any other communication or publication intended to solicit Vendors or Construction Services for the Project to be subcontracted to the extent consistent with the size and capability of MBE/WBE firms so that reasonable subcontracting opportunities exist. (County Code Section 645.2)
- Notified in writing Minority/Women Contractor Associations, community organizations, Contractors' groups, government sponsored Minority and women business assistance offices and other appropriate organizations to provide assistance in the recruitment and placement of M/WBE firms. Notification to these organizations should occur at least 15 calendar days prior to the unitization of vendors or Construction services for each Project to include the availability of specific opportunities, at least equal to the Utilization Goals given to M/WBE as provided in the Jackson County Code Section 645.6.
- Conferred with qualified, certified MBE's and WBE's and explained the work for which their bids or proposals were solicited.
- The bidder has made efforts to assist M/WBE's with bonding, insurance or line of credit, where appropriate. (County Code Section 645.4)
- Assisted M/WBE contractors in obtaining necessary equipment, supplies, and materials, where appropriate. (County Code Section 645.5)

9. _____ Made telephone calls to MBE/WBE contractors or vendors and log, including date, time, name of person talked to, and subject of discussion. (County Code Section 645.3)
10. _____ Conducted good faith negotiations, as determined by the CRO, with those MBE/WBE firms from whom proposals were received in an effort to reach a mutually acceptable agreement. (County Code Section 645.3)

Documentation in support thereof may include:

- a. Copies of solicitation letters
- b. Bid price of MBE/WBE
- c. Bid price of non-MBE/WBE bidder
- d. Reason for non-selection of the MBE/WBE bidder.



Nancy M. Mellard - Executive Vice President - CBIZ Benefits & Insurance Services, Inc.

Subscribed and sworn to before me this 22nd day of April, 2024

State of Missouri County of Jackson

My Commission Expires: 4/18/2026



Notary Public

(Attach official seal if applicable)



Please submit Checklist and attached documentation by required deadline to: CRO@jacksongov.org .

Compliance Review Office
 Jackson County Auditor's Office
 415 East 12th Street, 2nd Floor
 Kansas City, Missouri 64108
 Ph. 816-881-3302
 Fax: 816-881-1223

Talbot, Rhys

From: Krull, Matt
Sent: Monday, April 22, 2024 1:35 PM
To: CRO
Cc: Talbot, Rhys
Subject: Re: EXTERNAL Jackson County RFP--Employee Benefits-CBIZ Inquiry

Thank you, Melinda. I am assuming, but wanted to confirm that the percentage equates to percentage of the final contract?

From: CRO <CRO@jacksongov.org>
Sent: Monday, April 22, 2024 1:29:19 PM
To: Krull, Matt <MKrull@CBIZ.com>; CRO <CRO@jacksongov.org>
Cc: Talbot, Rhys <Rhys.Talbot@CBIZ.com>
Subject: [EXT] RE: EXTERNAL Jackson County RFP--Employee Benefits-CBIZ Inquiry

> External email sender cro@jacksongov.org from United States <
> Be suspicious of external email and never provide your authentication details <

.
Goals were set on this bid at 9.5% MBE and 11.7% WBE. Attached is a directory of certified firms.

Thank you,
Melinda K. Bolling

From: Krull, Matt <MKrull@CBIZ.com>
Sent: Monday, April 22, 2024 1:26 PM
To: CRO <CRO@jacksongov.org>
Cc: Talbot, Rhys <Rhys.Talbot@CBIZ.com>
Subject: EXTERNAL Jackson County RFP--Employee Benefits-CBIZ Inquiry

You don't often get email from mkrull@cbiz.com. [Learn why this is important](#)

WARNING: This email originated outside of Jackson County.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

Good afternoon, Melinda-

I was reaching out on behalf of CBIZ to request assistance from the Compliance Review Office in an effort to potentially partner/identify an MBE/WBE/VBE partner. The request for proposal initially mentioned 0% MBE goals and had another General Contractors document mentioning the goals below. We just received clarification this afternoon to our questions and received clarification the 0% was a mistake. CBIZ would like to formally ask for help from your office. Could you please let me know what additional information you would need from myself and CBIZ? We will make sure we select this box when we formally respond to the RFP tomorrow. Thank you!

Clarification received as of this afternoon on our question-

3. We would like to request clarification regarding the MBE/WBE/VBE requirements listed in the RFP. Page 5 of the Purchasing Forms pdf lists goals as _0%_ MBE ___ WBE ___ VBE, while the Compliance Goals form lists these at 9.5% MBE 11.7% WBE 9.5% VBE. Could you please let us know which set of goals we need to work off of?

A. The 0% is a mistake, the Compliance goals listed on the form are correct.

- Requested in writing, assistance of the Compliance Review Office with respect to efforts to promote the utilization of MBE/WBEs and acted upon the CRO's recommendations. Other appropriate organizations may be used to identify qualified M/WBE's. (County Code Section 645.6)

Matt Krull

Consultant

CBIZ Employee Benefits

A division of CBIZ Benefits & Insurance Services, Inc.

Phone: 816-945-9522 Cell: 816-810-8795



700 W 47th St Ste 1100 | Kansas City | MO | 64112

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CEO to CEO Challenge

Supply Chain Diversity Pledge

As CEO of _____ I commit our firm to intentional, inclusive procurement with diverse suppliers of 100 employees or fewer. This effort will be integrated into our strategic sourcing and purchasing processes. Where possible, local suppliers will be prioritized to generate efficiency and innovation for our firm. We will increase opportunities for small and diverse suppliers and contribute to the economic growth of the region.

Our goal is to spend _____ percent of procurement dollars with diverse suppliers by 20____ OR to grow our spend year-over-year with diverse suppliers.

This goal will be accomplished by establishing and supporting partnerships with the small and diverse business community, developing these businesses for growth and engaging with community organizations that share our commitment.

- I pledge to support the local economy by buying from small and diverse-owned businesses.
- I pledge to spread this message and to be an advocate for the cause throughout all departments in our firm and with my peers.
- I pledge to establish an internal accountability framework around intentional, inclusive procurement to include data tracking and reporting of new and existing vendors within the next 90 days. At least once per year, I will report our progress to KCSOURCELINK, and this figure will be part of an annual progress report to the community delivered by KCSOURCELINK and KC RISING. (Community reports will be in aggregate with no individual firm identified.)
- I pledge this goal will be woven into the culture of the corporation by tying it to the firm's strategic priorities and employee performance evaluations.
- I pledge to evaluate our sourcing and procurement spend to identify opportunities to grow or expand relationships with small and diverse suppliers. In categories where we have low diverse spend, we will evaluate and innovate our purchasing process to include small and diverse suppliers.
- I pledge to build the diversity of our supplier pipeline. This may take the form of mentorship or sponsorship of learning opportunities to improve business acumen, strategic planning skills and technical capacity.
- I pledge to spotlight success stories of diverse suppliers.
- I pledge to add resources necessary within the firm for the development and measurement of these activities, including human capital and technology supports.



CEO

Date

Please fill out all of the fields in this document, save as a PDF and email to info@kcsourcelink.com.



KCSOURCELINK

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (“MOU”) sets the terms and understanding between the Black Chamber of Commerce of Greater Kansas City, Inc., a 501(c) (3) nonprofit Missouri corporation (“Black Chamber”), and CBIZ, Inc., (subsidiaries CBIZ Benefits & Insurance Services, Inc. and CBIZ Accounting, Tax & Advisory of Kansas City, LLC) (“Provider) related to the Provider’s participation in the Black Chamber’s Stronger Together KC program (“STKC”). Collectively, the Black Chamber and CBIZ, will be referred to as “Parties.”

Background

The Black Chamber of Commerce recognizes the need for Black-owned businesses to have access to capital and advanced technical and professional assistance. The Black Chamber of Commerce has developed the STKC program to assist Black-owned businesses in the greater Kansas City area by giving them opportunities to access capital and advanced technical assistance in an effort to address systemic racism and financial disparities in America, and more specifically, Kansas City, Missouri. Under the STKC program, the Black Chamber is collaborating with key stakeholders as partners to assist Black owned businesses with access to capital, advanced technical assistance, and business opportunities. CBIZ is a key stakeholder partner in the STKC program.

The terms of this key stakeholder partnership are as follows:

1. Provider will participate in the Black Chamber’s STKC program by donating advanced technical assistance in the following areas to Black-owned businesses selected by the Black Chamber: educating participants regarding employee health benefit and insurance options; insuring against business risks; educating participants about advanced accounting and tax requirements; and investment planning solutions.
2. Provider will donate advanced technical assistance to up to twenty-four companies selected by the Black Chamber annually. Provider will not charge participants or the Black Chamber a fee for advanced technical assistance in the areas noted above.
3. Provider will assign at least one company representative to each STKC participant for the purpose of building a relationship, checking in for questions, and the participants’ understanding of the educational programs designed for STKC and sponsored by Provider.
4. Provider will jointly promote its participation in the STKC program with the Black Chamber.
5. Provider will communicate with the Black Chamber regarding concerns related to participants. Provider will solicit data from participants as directed by the Black Chamber and provide said data to the Black Chamber.

- 6. Provider will execute a Confidentiality and Non-Disclosure Agreement with the Black Chamber.

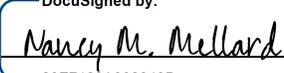
The Parties can modify this Agreement at any time by mutual consent. This MOU shall become effective upon signature by the Parties and will remain in effect until modified or terminated in writing at any time by the Black Chamber or by Provider.

Contact Information

Black Chamber of Commerce of Greater Kansas City, Inc.
 Kelvin Perry, Board President
 5737 Swope Parkway
 Kansas City, MO 64130
kwperry@bccgkc.org

CBIZ
 Carolyn Watley, Vice President
 700 W. 47th Street, Suite 1100
 Kansas City, MO 64112
cwatley@cbiz.com

_____ Date: _____
 Black Chamber of Commerce of Greater Kansas City, Inc.
 By: Kelvin W. Perry

DocuSigned by:

 _____ Date: October 26, 2021
 CBIZ 20E7129A902840D...
 By: Nancy M. Mellard, Executive Vice President

Jackson County Missouri

Certificate of Compliance



In accordance with Jackson County Code Chapter(s) 6 and 10,
this Certificate of Compliance is hereby issued to:

CBIZ Benefits & Insurance Services, Inc.

700 W. 47th Street 1100

Kansas City, MO 64112

2024 Certificate: 20240304VC846

Issued: 2024-03-04

Expires: 2024-12-31

The above named firm/agency has met the following requirements:

Is duly listed and assessed on the tax rolls of Jackson County, Missouri and is not delinquent in the payment of any taxes due to the County, or did not have on December 31st of the previous year any property subject to taxation by the County

Attests and agrees to Chapter 6 of the Jackson County Code which prohibits discriminatory employment practices and promotes equal employment opportunity by contractors doing business with Jackson County.

A handwritten signature in blue ink that reads "Melinda Bolling".

Chief Compliance Review Officer
Jackson County Missouri
816-881-3302

compliance@jacksonsongov.org

JACKSON COUNTY REQUEST FOR PROPOSAL



OFFICE OF THE COUNTY AUDITOR
COMPLIANCE REVIEW OFFICE
415 E 12TH STREET, 2ND FLOOR
KANSAS CITY, MISSOURI 64106

(816) 881-3302
FAX (816) 881-3340
COMPLIANCE@JACKSONGOV.ORG
WWW.JACKSONGOV.ORG/AUDITOR

CERTIFICATE OF COMPLIANCE NOTICE

All vendors doing business with Jackson County are required to obtain a Certificate of Compliance issued by the Jackson County Compliance Review Office.

A Certificate of Compliance is required to be submitted with any bid response. Failure to comply with this requirement may result in the REJECTION of a bid.

**Vendors may complete a
Certificate of Compliance Application by visiting
www.jacomocompliance.com**

A Certificate of Compliance will certify that vendors meet the following requirements:

1. Are duly listed and assessed on the tax rolls of Jackson County and are not delinquent in the payment of any taxes due to the County, or do not have on December 31st of the previous year any property subject to taxation by Jackson County.
2. Attest and agree to Chapter 6 of the Jackson County Code which prohibits discriminatory practices and promotes Equal Employment Opportunity by contractors doing business with Jackson County.

Certificate of Compliance Application must be submitted five (5) business days prior to a bid response deadline to allow sufficient time to process. A Certificate of Compliance is not guaranteed if this timeline is not met.

QUESTIONS? Email compliance@jacksongov.org

STATEMENT OF NO BID

TO: Jackson County Purchasing Department
Jackson County Courthouse
415 East 12th Street, Room G1
Kansas City, MO 64106

We, the undersigned, have declined to submit a bid in response to this Invitation to Bid for the following reasons(s):

- Specifications too "tight", i.e., geared toward one brand or supplier.
- Insufficient time to respond to the bid.
- We do not offer this product or service.
- Our schedule would not permit us to perform.
- We are unable to meet specifications.
- We are unable to meet bond requirements.
- Specifications are not clear (explain).
- We are unable to meet insurance requirements.
- Remove us from your list for this commodity or service.
- Other (explain). _____

REMARKS _____

Company Name: _____

Signature: _____

Telephone: _____

Date: _____

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA

The undersigned acknowledges receipt of Addenda through and including numbers _____ and that this Bid is submitted in accordance with information, instructions, and stipulations set forth therein.

Signature of Respondent

Date

Company Name

Address

City, State, and Zip

Phone

GENERAL CONDITIONS

The General Conditions which follow apply to and are a part of this Invitation to Bid unless otherwise specified herein. Subject to State and County laws and all rules, regulations and limitations imposed by legislation of the Federal Government, responses on all advertisements and invitations issued by the Jackson County Purchasing Department will bind Respondents to applicable conditions and requirements herein set forth unless otherwise specified in the Invitation to Bid. Respondents or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting a response to a bid; failure to do so will be at the Respondent's own risk and he cannot secure relief on the plea of error.

1. **Withdrawal of Response to Bid:** A written request for the withdrawal of a bid or any part thereof may be granted if the request is received in the Office of the Director of Finance and Purchasing prior to the response deadline.
2. **Completeness:** All bids must be submitted on-line through the Bonfire Portal at <http://jacksongov.bonfirehub.com> . Bids submitted by any other method/manner will not be accepted.
3. **Bids Binding For 90 Days:** Unless otherwise specified all bids submitted shall be binding for ninety (90) calendar days following the response deadline, unless the Respondent(s), upon request of the Director of Finance and Purchasing, agrees to an extension.
4. **Exceptions:** Conditional or qualified bids are subject to rejection in whole or in part. All exceptions to the specifications of this Invitation to Bid must be made in writing and attached as Exhibit F to the bid when it is submitted by the Respondent. The County will consider **minor** exceptions to its specifications. A minor exception is one which is a matter of form, not substance. The minor exception is considered immaterial and inconsequential when its significance to price, quantity, quality, or delivery is trivial or negligible when contrasted with total scope of the Invitation to Bid (ex: comparable manufacturer or alternate bids where allowed by the Invitation to Bid). The County will not consider exceptions to its General Conditions, Forms, or Insurance Requirements. The County reserves the right in its sole discretion to accept or reject any exceptions included in Exhibit F. Exceptions made in any other manner or form whether by omission or by inclusion in any other manner other than as specifically entered and described in full on Exhibit F shall not be made a part of the resulting contract. Exceptions which are made by the Respondent and entered on Exhibit F and determined to be acceptable to the County shall be made a part of the resulting contract by inclusion as a provision of a mutually executed Amendment to the contract. Exceptions which are not made a part of said Amendment shall not be included in the contract nor be binding upon the County and the specifications of the Invitation to Bid shall prevail.
5. **Questions Regarding Specifications:** All Questions regarding this Invitation to Bid shall be communicated electronically through the Bonfire Portal via the Opportunity Q & A on the Invitation to Bid. All Questions must be received on the Bonfire Portal by 5:00 PM on May 13, 2022. All Questions will be answered in the form of Addenda to the Invitation to Bid on the Bonfire Portal.
6. **Multiple Bids:** No Respondent will be allowed to offer more than one bid on each item requested even though he may feel that he has two or more types or styles that will meet specifications. IF SAID RESPONDENT SHOULD SUBMIT MORE THAN ONE BID ON ANY ITEM REQUESTED, ALL BIDS FOR THAT ITEM MAY BE REJECTED AT THE DISCRETION OF THE DIRECTOR OF FINANCE AND PURCHASING.
7. The County reserves the right to split the award of the bid, to reject any or all bids, to waive technical defects in bids, and to select the bid(s) deemed most advantageous to the County. The County shall consider bids submitted on an "all or nothing" basis only if the bid is clearly designated as such by the Respondent affixing the words "ALL OR NOTHING" on the quotation portion of the Invitation to Bid.
8. **Applicable Law:** The contract shall be construed according to the laws of the State of Missouri. The Contractor must be registered and maintain good standing with the Secretary of State, of the State of Missouri and other regulatory agencies as may be required by law or regulation.

9. Communications and Notices: Any notice to the Contractor shall be deemed sufficient when deposited in the United States Mail postage prepaid; faxed; e-mailed; delivered to a telegraph office fee prepaid; or hand-carried and presented to an authorized employee of the Contractor at the Contractor's address as listed on the signature page of the contract or at such address as the contractor may have requested in writing.

10. Bankruptcy or Insolvency: Upon filing for any bankruptcy or insolvency proceedings by or against the Contractor, whether voluntary or involuntary, or upon the appointment of a receiver, trustee, or assignee for the benefit of creditors, the Contractor must notify Jackson County's Director of Finance and Purchasing immediately in writing. Upon learning of the actions herein identified, Jackson County reserves the right at its sole discretion to either affirm the contract or cancel the contract and hold the Contractor responsible for damages.

11. Patents: Contractor agrees to defend, indemnify, protect, and save harmless, Jackson County, Missouri, against all claims for royalties for patents or suit for infringement thereon which may be involved in the manufacture or use of the materials or items to be furnished.

12. By virtue of statutory authority, the Director of Finance and Purchasing shall give preference to all commodities manufactured, mined, produced, or grown within the State of Missouri and to all firms, corporations or individuals doing business as Missouri firms, corporations or individuals, when quality is equal or better and delivered price is same or less.

13. Material Standards: All material or equipment furnished shall meet the minimum requirements of the Occupational Safety & Health Standard (OSHA) published in the Federal Register.

14. Tax Clearance Required: No person, firm or corporation, resident in Jackson County, or otherwise legally within the taxing jurisdiction of the County, shall be eligible to provide any goods, contractual services or anything covered by the County Purchasing Ordinance, unless said person, firm or corporation is duly listed and assessed on the County tax rolls, and is in no way delinquent on any taxes payable to the County. Further, no person, firm, or corporation, regardless of state of residency, shall be eligible to provide any goods, contractual services, or anything covered by this chapter, of a cost in excess of \$150,000 per annum, if that person, firm or corporation is in any way delinquent on any taxes payable to any local government entity with which Jackson County has entered into an "Intergovernmental Agreement for Tax Verification Information".

Where any individual, firm or corporation is a resident of Jackson County, or it otherwise appears that such firm is legally within the taxing jurisdiction of the County, and has made an offer, bid, or quotation for any County purchase, or has submitted an application to be given an opportunity to make quotations for County purchases, the Director of Finance and Purchasing shall cause a search to be made of the County tax rolls, and, if applicable, an inquiry to be made of the appropriate personnel of any other local government entity with which Jackson County has entered into an "Intergovernmental Agreement for Tax Verification Information", to determine the eligibility of that person, firm or corporation under this section.

When the lowest/highest responsible bidder for a given purchase order or contract is ineligible under this section, the Director of Finance and Purchasing may, where time is not of the essence to the County, notify the bidder and allow three (3) days for the bidder to correct the deficiency or pay up any delinquency involved. If the bidder fails, after such notice, to comply within three (3) days, or if the Director of Finance and Purchasing deems time to be of the essence, he shall proceed as though the next lowest/highest responsible bidder who is eligible under this section had entered the lowest/highest bid.

15. Insurance and Indemnification: The Successful Contractor shall defend, indemnify, and hold harmless Jackson County and any of its agencies, officials, officers, or employees from and against all claims, damages, liability, losses, costs and expenses, including reasonable attorney's fees, arising out of or resulting from any acts or omissions in connection with the operations or work included or undertaken in the performance of this contract, caused in whole or in part by Contractor, its employees, agents, or subcontractors, or caused by others for whom Contractor is liable. Contractor's obligations under this section with respect to indemnification for acts or omissions shall be limited to the coverage and limits of insurance that Contractor is required to procure and maintain under this Contract. Insurance shall be procured and maintained by Contractor as described in Exhibit A of this Invitation to Bid. Contractor shall file Certificates of Insurance with Jackson County Purchasing Department in the form described in Exhibit A within the time limit also described in the Exhibit.

16. The County is not responsible for articles or services furnished without a Purchase Order.

17. Inspection and Acceptance: Inspection and acceptance will be at destination. Prior to the time of delivery and acceptance by the County, or after any rejection, risk or loss shall be the responsibility of the Contractor unless loss results from negligence of the County.

18. Equal Opportunity: The Contractor shall maintain policies of employment as follows:

a) The Contractor and the Contractor's Subcontractor(s) shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, disability, or national origin. The Contractor shall take affirmative action to ensure

that applicants are employed, and that employees are treated during employment without regard to their race, religion, color, sex, disability, or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the policies of non-discrimination.

b) The Contractor and the Contractor's Subcontractor(s) shall, in all solicitations or advertisements for employees placed by them or on their behalf, state that all qualified applicants will receive consideration for employment without regard to race religion, color, sex or national origin.

19. Foreign Corporations: Firms submitting bids as corporations which are not incorporated in the State of Missouri must include with their bid a copy of a properly executed **Certificate of Registration for Foreign Corporation** authorizing the firm to do business in the State of Missouri.

20. Errors in Bids: Respondent shall be bound by its bid even though the bid is based on an erroneous calculation, and Respondent shall have no right to withdraw its bid after the Response Deadline on the basis of an error in calculation of its bid. Carelessness in quoting prices, or in preparation of bid, will not relieve the Respondent in case of errors. Erasures or changes in bids must be initialed.

21. Omission in Bids: Omission in the bid of any provision herein prescribed shall not be construed as to relieve the contractor of any responsibility or obligation requisite to the complete and satisfactory operation of any and all equipment and services. Any exception to the bid must be in writing and not by omission.

22. No lowest/highest Respondent shall receive a business expectancy merely because his bid is the lowest/highest one received; until the contract has been awarded, no business expectancy exists.

23. Conflict of Interest: Respondent warrants that no officer or employee of the County, whether elected or appointed, shall in any manner whatsoever be interested in or receive any benefit from the profits or emoluments of this contract.

No official or employee of Jackson County or its governing body and no other public official in Jackson County who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of the project covered by this contract shall voluntarily acquire any personal interest, directly or indirectly, in this contract.

The Contractor covenants that he/she presently has no interest and shall not acquire any interest, directly or indirectly, which would conflict in any manner or degree with the performance of the services hereunder. The Contractor further covenants that no person having any such known interest shall be employed or conveyed an interest, directly or indirectly, in this contract.

24. It shall be the responsibility of all Respondents to warrant that all goods, services and/or work to be procured and/or performed under this contract shall conform to and/or be performed in compliance with all applicable Federal, State and Local Statutes, Ordinance and Codes including but not limited to the American with Disabilities Act of 1990. Failure to comply in any manner with applicable Statues, Ordinances or Codes shall result in said Contractor replacing the goods, services and/or work performed in order to effect compliance or in liquidated damages in the amount required to effect compliance with said Statues, Ordinance and Codes together with any costs associated with collection of said damages.

25. Bidder certifies that all goods to be supplied to the County as a result of contracts awarded under this Invitation to Bid were produced in compliance with all applicable requirements of sections 6, 7, and 12 of the Fair Labor Standards Act, as amended, and of regulations and orders of the United States Department of Labor issued under section 14 thereof.

26. Fund Allocation: Continuance of any resulting agreement, contract, or issuance of purchase orders after December 31 of the current calendar year is contingent upon the allocation of County funds for the next proceeding calendar year.

27. Qualifications of Bidders: The County may make such reasonable investigations as deemed proper and necessary to determine the ability of the bidder to perform the work and the bidder shall furnish to the County all such information and data for this purpose, as may be requested. The County reserves the right to inspect bidder's physical plant prior to award to satisfy questions regarding the bidder's capabilities. The County further reserves the right to reject any bid if the evidence submitted by or investigations of such bidder fails to satisfy the County that such bidder is properly qualified to carry out the obligations of the contract and to complete the work contemplated herein.

28. Except for the furnishing and transportation of materials, the Contractor shall not sublet, sell, transfer, assign, or otherwise dispose of any portion of this contract to any individual, firm, or corporation without written consent of Jackson County. This consent of the County will not be given unless, and until the Contractor has submitted satisfactory evidence that the proposed subcontractor is qualified to execute the work and has an Affirmative Action Plan acceptable to the County, together with a complete copy of the subcontract if so, requested by the County. The subcontract shall bind the subcontractor to comply with all requirements of this contract including but

not limited to wage rates, equal employment opportunity regulations, submittal of payrolls, etc. Assignment of the entire contract may be made only upon written consent of the County.

No assigning, transferring, or subletting, even though consented to, shall relieve the Contractor of his liabilities under this contract.

The Contractor shall give his personal attention to any portion of this contract which has been sublet and he shall be responsible for its proper completion.

The Contractor, as a condition of this contract, is responsible for assuring submission of proof or documentation regarding Affirmative Action Compliance by his subcontractors and for the subsequent Affirmative Action performance by such subcontractors.

Jackson County reserves the right to approve or reject the Bidder's proposed subcontractors in accordance with these and any other requirements of this Invitation to Bid.

For Public Works and Parks + Rec Construction and Repair Projects: The Contractors own forces and equipment shall perform not less than 50 percent of the contract work.

29. Minority, Women and Veteran Business Enterprise Utilization: Contractor shall comply with all requirements of Chapter 6, Jackson County Code, a copy of which can be viewed on the County's website at <http://www.jacksongov.org/394/Compliance-Review-Office>, Government, County Code, Current Code, 06. Affirmative Action Programs and by reference, incorporated herein for the construction under a County bid or for the purchase of County goods and services. Contractor shall ensure that it and its subcontractors collectively meet both the MBE, WBE and VBE goals established by the County, or show good faith effort as to why those goals could not be met and comply with all reporting requirements. The Contractor, as a condition of this contract, is responsible for assuring submission of the Contractor Utilization Plan and other documentation regarding utilization of MBE, WBE and VBE Subcontractors, and good faith efforts when requested by the County. Contractor Utilization Plan must be accepted by the Compliance Review Office prior to contract being awarded.

30. As a condition for the award of any contract or grant in excess of five thousand dollars by the County to a business entity, the business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Every such business entity shall also sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. Any entity contracting with the state, or any political subdivision of the state shall only be required to provide the affidavits required in this subsection to the state and any political subdivision of the state with which it contracts, on an annual basis.

31. This contract shall be construed according to the laws of the State of Missouri, including Missouri Revised Statute Chapter 610.111.1, which requires that all records of Jackson County, Missouri will be open to the public, unless subject to statutory exception, as Jackson County, Missouri is a public governmental body. Pursuant to Missouri Revised Statute Chapter 610.021(12), sealed bids, and related documents, once the bid documents have been opened, along with any related documents, are considered public records subject to disclosure upon request. Missouri Revised Statute Chapter 610.021(12) also requires, upon request, disclosure of any negotiated contract and documents related to such contract once the contract has been executed or until all bids have been rejected.

32. If awarded a Contract as a result of this bid; you must have a hard copy of a purchase order issued by the Jackson County, Missouri Finance and Purchasing Department **BEFORE** providing any goods and/or services. Failure to adhere to this policy will result in the immediate termination of said contract.

33. Wage Rates: Except as provided in subparagraph A., below, this contract shall be based upon payment by the Contractor and its subcontractors of wage rates not less than the prevailing hourly wage rate for each craft or classification of workman engaged on the work as determined by the Industrial Commission of Missouri on behalf of the Department of Labor and Industrial Relations.

A. Wage Law: Except as provided in this subparagraph, the contractor shall comply with all requirements of the prevailing wage law of the State of Missouri, Revised Statutes of Missouri, Sections 290.210 to 290.340, including the latest amendments thereto. Pursuant to section 290.230.5, the provisions of the prevailing wage law do not apply to the construction of public works for which either the engineer's estimate or the bid accepted by the county for the total project cost is in the amount of \$75,000 or less. The "total project cost" is based upon the entire project and not individual jobs within a larger project. The "total project cost" includes the total value of work performed on the project by every person paid by a contractor or subcontractor for that person's work on the project and additionally includes all materials and supplies purchased for the project. The provisions of this paragraph 33 do not apply to any contract that is excluded from the applicability of the Missouri prevailing wage law pursuant to section 290.230.5, RSMo.

B. Penalty: The Contractor shall forfeit as a penalty to the County, One Hundred Dollars (\$100.00) for each workman employed, for each calendar day, or portion thereof, that such workman is paid less than the said stipulated rate for any work done under this contract by the Contractor or by any of its subcontractors.

C. The contractor and all subcontractors to the contract must require all on-site employees to complete the ten-hour construction safety training program required under Section 292.675 RSMo, unless they have previously completed the program and have documentation of having done so. The contractor will forfeit a penalty to the contracting public body of \$2500 plus an additional \$100 for each employee employed by the contractor or subcontractor, for each calendar day, or portion thereof, such employee is employed without the required training.

D. Withholding Payment: Under Section 290.250 of said law, the County has a duty to withhold and retain from payment, which is due to the Contractor under this contract all sums and amounts due and owing as a result of any violation of said laws. The County reserves the right to withhold payments throughout the duration of any resulting contract if a contractor is found to be delinquent in any aspect relating to compliance with Chapters 6 and 19 of the Jackson County Code. Payments may be held until all said delinquencies have been rectified to the satisfaction of the Compliance Review Office.

E. Required Records: The Contractor and each subcontractor shall keep an accurate record showing the names and occupations of all workmen employed, together with the actual wages paid to each workman. At all reasonable hours, such records shall be open to inspection by the representatives of the Industrial Commission of Missouri and the County. Said records shall be kept for a minimum of one (1) year after the project has been accepted and the Required Affidavit, outlined in subsection G, is received.

F. No Adjustment for Changes in Rates: During the life of this contract, the prevailing hourly rate of wages is subject to change by the Department of Labor and Industrial Relations or by court decision, as provided by law. Any such change shall not be the basis of any claim by the Contractor against the County, nor will deductions be made by the County against sums due to the Contractor by reason of any such change.

G. Exceeding Rates and Hours: The prevailing wage law does not prohibit payment of more than the prevailing rate of wages, nor does it limit the hours of work which may be performed by any workman in a particular period of time.

H. Required Affidavit: No final payment for work under this contract will be made by the County until it has received from each Contractor and subcontractor an affidavit stating that each has fully complied with the provisions and the requirements of said law.

I. Prevailing Wages: The current prevailing wage rate determination made by the Industrial Commission of Missouri and applicable during the term of this contract is reproduced verbatim herein.

J. Posting: Throughout the life of this contract, a copy of the wage determination and the rules promulgated by the Industrial Commission of Missouri, shall be displayed in a conspicuous place on the project under a heading of NOTICE, with the heading in letters at least one inch high.

K. Contract Work Hours and Safety Standards Act (42 U.S.C. Sect. 329): The Contractor is required to comply with Section 103 of the above Act.

L. Certified Payroll Records: An original copy of certified payroll records shall be emailed weekly to the Compliance Review Office at CRO@jacksongov.org. A copy of certified payroll records indicating applicable invoice number(s) shall also be emailed to the Project Supervisor.

Payroll Records must meet the following minimum requirements:

Workers must be classified according to the State's Occupational Title Rule. Workers listed as Journey Worker for Local Union XX is not acceptable. The specific classification must be named.

The specific Group must be named. It is impossible to compare wage rates paid to the proper prevailing wage rate if the Group is not listed.

For all apprentices on each payroll, the apprentice letter must be attached confirming registration in the program, level in the program (i.e., 3rd Level, or 3rd 6-Month Period) and the percentage of the base wage rate the apprentice is to be paid. If the same apprentice is used more than one week, only one letter for each apprentice needs to be submitted the first time the apprentice is shown on the payroll.

The one-to-one ratio of apprentices to journey workers must be followed. Any apprentice working out of ratio or without a journey worker present must be paid journey worker's level wages.

Fringe benefits must be indicated whether paid in cash or to a fund by checking the box on the certificate page of the payroll form. If fringe benefit contributions are not indicated by an hourly rate on the certificate payroll form, please submit a one-time letter with the next applicable payroll indicating the hourly breakdown of contributions made and to where.

34. Changes in the Work: Changes in the works as defined in this Invitation to Bid which result in additions, deletions, or other revisions to the Contract Sum or Contract Time must be accomplished by written Change Order to the Contractor. Such Change Orders must be submitted in writing by the Contractor and approved in writing by the County prior to the commencement of the work included in such Change Orders.

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

- 7.1 Upon the selection of the successful proposal, a Contract incorporating the General Conditions, Scope of Services, Pricing, and other provisions of this Request for Proposal and acceptable by both parties, will be prepared and executed by both parties. Should the parties, within a reasonable time frame, as determined by Jackson County, Missouri fail to develop and execute a mutually agreed upon Contract, and upon a three-business day notification to the selected respondent, the County may reject the proposal and proceed to award the Contract to the next best respondent.
- 7.2 Pursuant to Section 610.021 RSMo, proposals and related documents shall not be available for public review until contract(s) have been awarded or all proposals are rejected.
- 7.3 In no event will the following be considered confidential or exempt from the Missouri Sunshine Law:
 - 7.3.1 Respondent's entire proposal,
 - 7.3.2 Respondent's pricing,
 - 7.3.3 Respondent's proposed method of performance, including a list of events and/or deliverables,
 - 7.3.4 Respondent's experience information, including customer's lists or references,
 - 7.3.5 Respondent's product specifications unless specifications disclose scientific and technological innovations in which the owner has a proprietary interest.
- 7.4 The County does not generally use standard contract forms which may be provided by the Respondent. The Contract documents used by the County will include both the Request for Proposal and the Respondent's proposal. In the event that conflicts in language exist between the Request for Proposal and the Respondent's proposal, the provisions of the Request for Proposal shall govern. The Respondent shall list any and all exceptions as instructed under General Conditions, Item Number 5 of this Request for Proposal. Please note that the Respondent's proposal is subject to rejection if exceptions to the County's General Conditions, Forms or Insurance requirements are requested.
- 7.5 Respondent must agree to the following standard provisions:
 - 7.5.1 INDEMNIFICATION: Respondent agrees to the fullest extent permitted by law, to indemnify and hold the County harmless from damages and losses arising from the negligent acts, errors, or omissions of Respondent in the performance of the work under this Contract, to the extent that Respondent is responsible for such damages and losses on a comparative basis of fault and responsibility between Respondent and the County. Respondent is not obligated to indemnify the County for the County's own negligence.
 - 7.5.2 INDEPENDENT CONTRACTOR: Respondent shall work as an independent contractor and not as an employee of Jackson County, Missouri. Respondent shall be subject to the direction of the County only as to the result to be accomplished and not as to the means and methods for its own Federal, State and City withholdings taxes and all other taxes, and operate its business independent of the business of the County except as required by this Contract.
 - 7.5.3 CONFIDENTIALITY: Respondent acknowledges and agrees that all County information and records are confidential and will not disclose or make available this information or records to anyone outside the County organization unless authorized to do so in writing.
 - 7.5.4 COMPLETE AGREEMENT: Parties agree that this Contract together with Jackson County, Missouri Request for Proposal No. 42-21 and Respondent's response thereto constitute the complete and exclusive agreement between the parties which supersedes all prior proposals or understandings or agreements, oral or written and all other communications between parties relating to the subject matter of this Contract.
 - 7.5.5 NOTICES: Any notice with either party shall be required by this Contract to give each other shall be in writing and delivered by mail addressed to the respective parties as follows, or to such other addresses, as the respective parties may designate from time to time:

County: Jackson County, Missouri
415 East 12th Street, Room 105
Kansas City, Missouri 64106

Contractor: _____

- 8.1 All questions regarding this Request for Proposal shall be communicated electronically through the Bonfire Portal via the Opportunity Q&A on the Request for Proposal. All questions must be received on the Bonfire Portal by 5:00 CDT/CST on April 17th, 2024.
- 8.2 All questions will be answered in the form of Addenda published via the Bonfire Portal.
- 8.3 Respondents and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must follow this procedure. Respondents or their agents may not contact any other County employees regarding the matters covered in this Request for Proposal during the solicitation and evaluation process. Inappropriate contacts are grounds for REJECTION of Respondent's Proposal.

EXHIBIT A, INSURANCE

Contractor shall procure and maintain in effect throughout this duration of the contract insurance coverages not less than the types and amounts specified in this section. If due to the nature of the goods and/or services provided by the contractor are such that they may be excluded from coverage listed below, an addendum shall be made to the contract requesting coverage and limits required (Professional Liability, Work on bodies of water, Garage or tow services, Liquor liability are some examples).

All subcontractors of the contractor are required to carry the same coverages and limits as the contractor. All Liability policies required are to be written on an "occurrence" basis unless an agreement, in writing, is made with Jackson County.

1. COMMERCIAL GENERAL LIABILITY

Commercial General Liability Insurance: with limits of not less than \$1,000,000 per occurrence and \$2,000,000 Annual Aggregate (both General and Products-Completed Operations). Aggregate shall be on a "per project" basis where more than one project is to be performed by the contractor under this contract. Policy shall include Severability of Interests coverage applying to Additional Insureds and also include Contractual Liability with no limitation endorsements. Policy shall include \$100,000 limit each occurrence for Damage to Rented Premises, \$1,000,000 limit each occurrence for Personal & Advertising injury liability, \$5,000 Medical Expense (any one person), and Employee Benefits Liability coverage with a \$1,000,000 limit.

2. COMMERCIAL AUTOMOBILE LIABILITY

Commercial Automobile Liability Insurance: with a limit not less than \$1,000,000 Combined Single Limit for Bodily Injury and Property Damage Limit (each accident), covering owned, hired, borrowed, and non owned vehicles. Coverage shall be provided on a "any auto" basis and be on a Commercial Business Auto form, or acceptable equivalent, and will protect against claims arising out of the operation of motor vehicles in connection with this contract.

3. WORKERS COMPENSATION AND EMPLOYERS' LIABILITY COVERAGE

Contractor shall provide coverage for Workers Compensation and Employers Liability for all claims by employees of the contractor or by anyone for whose acts it may be liable under the statutes of the State of Missouri with limits of:

-Workers Compensation	Statutory
-Employers Liability	\$500,000 each accident
	\$500,000 Disease-each employee
	\$500,000 Disease-Policy limit

4. EXCESS/UMBRELLA LIABILITY COVERAGE

Contractor shall provide Excess/Umbrella liability, on an occurrence basis, with \$10,000 Retention, to provide coverage limits over all liability coverages listed above, at a limit not less than \$1,000,000 each occurrence and \$1,000,000 Aggregate.

5. ADDITIONAL INSURED & CERTIFICATE OF INSURANCE

The Commercial General and Automobile Liability Insurance specified above shall provide that Jackson County Missouri and its agencies, officials, officers, and employees, while acting within the scope of their authority, will be named as additional insured for the services performed under this contract.

A Certificate of Insurance shall be filed with the County's Director of Finance and Purchasing within 10 calendar days of the date when requested or before commencement of the work that are acceptable to the Director that the insurance requirements have been satisfied. Should any of the required insurances be cancelled before the expiration date, a notice shall be filed with the County's Director of Finance and Purchasing in accordance with policy provisions. In the case of multi-year, renewable, or extended term on the contract; Contractor must supply the Director with current Certificate(s) on any coverage mentioned above within Thirty (30) days prior to the expiration date of coverage(s). The Director of Finance and Purchasing may request copies of the Contractor's insurance policies for verification of coverage(s).

6. QUALIFICATIONS INSURANCE CARRIERS

All insurance coverage must be written by companies that have an A. M. Best's rating of "B+ V" or better or Lloyd's of London and are licensed and approved by the State of Missouri to do business in Missouri.

7. FAILURE TO MAINTAIN INSURANCE COVERAGE

Regardless of any approval by Jackson County, it is the responsibility of the contractor to maintain the required insurance coverage in force at all times; its failure to do so will not relieve it of any contractual obligation or responsibility. In the event of Contractor's failure to maintain the required insurance in effect, Jackson County may order Contractor to stop work immediately and, upon 10 days notice and an opportunity to cure, may pursue its remedies for breach of this contract as provided for herein and by law.



OFFICE OF THE COUNTY AUDITOR
COMPLIANCE REVIEW OFFICE
 415 E 12TH STREET, 2ND FLOOR
 KANSAS CITY, MISSOURI 64106

(816) 881-3302
 FAX (816) 881-3340
 CRO@JACKSONGOV.ORG
 WWW.JACKSONGOV.ORG/AUDITOR

JACKSON COUNTY, MISSOURI
CONTRACTOR UTILIZATION PLAN

Bid/RFP/RFQ Number: 24-024
Bid/RFP/RFQ Title: Employee Benefits Consulting Service
Contracting Department: Human Resources
Respondent: _____

I, _____, of lawful age and upon my oath state as follows:

1. This Affidavit is made for the purpose of complying with the provisions of the MBE/WBE/VBE submittal requirements on the above Bid/RFP/RFQ and the MBE/WBE/VBE Program and is given on behalf of the Respondent listed above. It sets out the Respondent's plan to utilize MBE and/or WBE and/or VBE prime and subcontractors on the awarded contract.

The goals set by Jackson County, Missouri are:

0 % MBE % WBE % VBE

2. Bidder stipulates that it will utilize a minimum of the following percentages of MBE/WBE/VBE participation in the above bid:

 % MBE % WBE % VBE

3. The following are the MBE/WBE/VBE Contractors to be utilized on the above-named solicitation. **Respondent maintains that it either has a formal contract or a conditional contract contingent upon award.**

Please note:

- a. If Bidder is a certified MBE, WBE, or VBE firm, it may list itself in the appropriate area below.
- b. No contractor may be listed under multiple categories below regardless of certifications.

INTERNAL USE ONLY	
CUP RECEIVED: _____	CUP APPROVED: _____
GFE RECEIVED: _____	GFE APPROVED: _____
CUP REVISED: _____	REVISION APPROVED: _____
APPROVED GOALS: <u> </u> MBE <u> </u> WBE <u> </u> VBE	
RES/ORD: _____	AMT AWARDED: _____
NOTES:	

MBE SUBCONTRACTORS

Add Additional Pages as Necessary

Description

Bidder Response

A.	MBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
			Certifying Agency: _____ KCMO _____ State of MO
			Approved: Y N
			Sub A Contract Value: \$

B.	MBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
			Certifying Agency: _____ KCMO _____ State of MO
			Approved: Y N
			Sub B Contract Value: \$

C.	MBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
			Certifying Agency: _____ KCMO _____ State of MO
			Approved: Y N
			Sub C Contract Value: \$
		TOTAL MBE VALUE	\$

Add Additional Pages as Necessary

Description

Bidder Response

A:	VBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		

B:	VBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		

C:	VBE Firm:		INTERNAL USE ONLY
	Address line 1:		
	Address line 2-include County:		
	Telephone Number:		
	President/Owner:		
	Email Address:		
	Certifying Agency		
	Expiration Date of Certification:		
	Scopes of Work Utilized:		
	Percentage of Contract Awarded:		
		\$	
		TOTAL VBE VALUE \$	

VBE SUBCONTRACTORS

*****Add Additional Pages as Necessary*****

ACKNOWLEDGMENT

Respondent acknowledges that it is responsible for considering the effect that any change order and/or amendments changing the total contract amount may have on its ability to meet or exceed the subcontractor participation goals.

Good Faith Effort:

Respondent further acknowledges that it is responsible for submitting a **Good Faith Effort Form** if it will be unable to meet the participation goals. A **Good Faith Effort Form** documents the efforts a respondent puts forth to achieve the MBE and/or WBE and/or VBE goals on a project. **Simply stating that goals cannot be met is not considered sufficient.**

Contractor Modification Form:

If, at any point during the life of the awarded contract, the contractor needs to substitute an approved subcontractor a **Contractor Modification Form** must be submitted to the Compliance Review Office.

Any Good Faith Effort or Contractor Modification Form must be approved by the Compliance Review Office.

*****Contact the Compliance Review Office for assistance or to request forms.*****

I hereby certify that I am authorized to make this Affidavit on behalf of the Respondent named below and who shall abide by the terms set forth herein. I acknowledge that the assigned values determined by this CUP shall be enforceable under the contract terms and conditions.

Respondent Primary Contact: _____

Title: _____ **Email:** _____

Date: _____ **Phone:** _____

Subscribed and sworn to before me this _____ day of _____, 20__.

My Commission Expires: _____

Notary Public
(Attach corporate seal if applicable)

For questions on this form please contact:

**Compliance Review Office
816-881-3302
CRO@jacksongov.org**



OFFICE OF THE COUNTY AUDITOR
COMPLIANCE REVIEW OFFICE
415 E 12TH STREET, 2ND FLOOR
KANSAS CITY, MISSOURI 64106

(816) 881-3302
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CRO@JACKSONGOV.ORG
WWW.JACKSONGOV.ORG/AUDITOR

GENERAL CONTRACTOR
GOOD FAITH EFFORTS CHECKLIST

General Contractor: _____ **Project:** _____
Representative: _____ **Title:** _____
Phone: _____ **Email:** _____

When required by the Compliance Review Office (CRO), the General Contractor must complete this checklist within the time frame provided. Check one or more of the following, documentation evidencing each checked item must be provided.

1. _____ Requested in writing, assistance of the Compliance Review Office with respect to efforts to promote the utilization of MBE/WBEs and acted upon the CRO's recommendations. Other appropriate organizations may be used to identify qualified M/WBE's. (County Code Section 645.6)
2. _____ Solicited in writing proposals from certified MBE/WBEs in sufficient time to allow MBE and WBE firms to participate effectively (in any event no later than 15 calendar days prior to the utilization of any Vendor or Construction Services for each project, setting forth in sufficient detail a description of the Project, identification of the vendor or contractor, the amount and scope of work to be performed, and the time frame of performance, so that meaningful proposals may be submitted sufficiently in advance to be considered prior to awarding contracts. (County Code Section 645.1)
3. _____ Advertised in Minority/Women's Trade Association Newsletters and/or minority owned media in sufficient time to allow MBE and WBE firms to participate effectively (in any event no later than at least 15 calendar days prior to the utilization of any Vendor or Construction Services for each Project, identifying specific opportunities at least equal to the Utilization Goal for MBE/WBE utilization specified for the contract and maintained a log or copies of such ads showing the date of publication and identifying the publication. (County Code Section 645.1)
4. _____ Adequately segmented the work in the bid or request for proposal documents or any other communication or publication intended to solicit Vendors or Construction Services for the Project to be subcontracted to the extent consistent with the size and capability of MBE/WBE firms so that reasonable subcontracting opportunities exist. (County Code Section 645.2)
5. _____ Notified in writing Minority/Women Contractor Associations, community organizations, Contractors' groups, government sponsored Minority and women business assistance offices and other appropriate organizations to provide assistance in the recruitment and placement of M/WBE firms. Notification to these organizations should occur at least 15 calendar days prior to the unitization of vendors or Construction services for each Project to include the availability of specific opportunities, at least equal to the Utilization Goals given to M/WBE as provided in the Jackson County Code Section 645.6.
6. _____ Conferred with qualified, certified MBE's and WBE's and explained the work for which their bids or proposals were solicited.
7. _____ The bidder has made efforts to assist M/WBE's with bonding, insurance or line of credit, where appropriate. (County Code Section 645.4)
8. _____ Assisted M/WBE contractors in obtaining necessary equipment, supplies, and materials, where appropriate. (County Code Section 645.5)

9. _____ Made telephone calls to MBE/WBE contractors or vendors and log, including date, time, name of person talked to, and subject of discussion. (County Code Section 645.3)
10. _____ Conducted good faith negotiations, as determined by the CRO, with those MBE/WBE firms from whom proposals were received in an effort to reach a mutually acceptable agreement. (County Code Section 645.3)

Documentation in support thereof may include:

- a. Copies of solicitation letters
- b. Bid price of MBE/WBE
- c. Bid price of non-MBE/WBE bidder
- d. Reason for non-selection of the MBE/WBE bidder.

Subscribed and sworn to before me this _____ day of _____, 20____

State of _____ County of _____

My Commission Expires: _____

Notary Public

(Attach official seal if applicable)

Please submit Checklist and attached documentation by required deadline to: CRO@jacksongov.org .

Compliance Review Office
Jackson County Auditor's Office
415 East 12th Street, 2nd Floor
Kansas City, Missouri 64108
Ph. 816-881-3302
Fax: 816-881-1223

Jackson County, Missouri MBE/WBE/VBE Contract Form			
Contracting Department		Date	
Human Resources		3/27/2024	
Project Number		Project Name	
24-024		Employee Benefit Consultant Services	
Estimated Contract Value	Proposed Solicitation Date	Proposed Project Start Date	Estimated Contract End Date
\$100,000.00	3/28/2024	6/1/2024	5/31/2027

Estimated Contract Value			
Scopes of Work	Dollar Amount	# of MBE available	# of WBE available
Total Must Equal Est Contract \$	\$ -	*Add more lines if needed	

Goals: Compliance Review Office			
<input checked="" type="checkbox"/>	Goals for Project have been set at		
	9.5 % MBE		11.7 %WBE
	9.5 % VBE		
<input type="checkbox"/>	Goals for Project are <u>WAIVED</u> because contract is:		
<input type="checkbox"/>	With another governmental agency		
<input type="checkbox"/>	For Real Property		
<input type="checkbox"/>	An Emergency Contact		
<input type="checkbox"/>	For purposes of borrowing money, bonds or other notes		
<input type="checkbox"/>	Sole Source		
<input type="checkbox"/>	Insufficient in terms of MBE or WBE firms available		
Signed: Melinda Bolling		Date: 3/27/24	

CUP: Compliance Review Office			
To be completed after bidding, in conjunction with review of CUP submitted by contracting Department			
<input type="checkbox"/>	Proposed utilization matches goals set above		
<input type="checkbox"/>	Proposed utilization differs from goals. This modification is acceptable		
	MBE/WBE/VBE participation on this project will be:		
	% MBE		% WBE
	% VBE		
<input type="checkbox"/>	Proposed utilization differs from goals. Modification is NOT acceptable		
Good faith effort documentation will be requested of contractor.			
Signed:		Date:	

ABOUT CBIZ

Our History

Since entering the professional services industry in 1997, CBIZ has experienced exponential growth through organic growth. While our ability to provide best-in-class resources and industry-leading expertise has grown, our mission has remained the same: to provide personal service and a unique level of hands-on support to our clients and their employees.

CBIZ is publicly traded and one of the nation's leading providers of professional advisory services; however, our foundation was built on boutique firms. That's why curating a local, high-touch client experience is at the core of everything we do.

Jerome Grisko, our Chief Executive Officer and Director, currently oversees more than 7,000 CBIZ associates in 120 offices across the country. CBIZ, Inc. is split into two divisions: financial services and benefits and insurance services. CBIZ Employee Benefits makes up approximately 600 of CBIZ's total employee count and has a presence in over 30 CBIZ offices nationwide.

Our Services

CBIZ delivers top-level financial and benefits and insurance solutions to organizations of all sizes, as well as individual clients. Our services include:

- Audit & Assurance Solutions
- Tax Solutions
- Advisory Solutions
- Employee Benefits Solutions
- Human Capital Management Services
- Retirement & Investment Solutions
- Talent & Compensation Solutions
- Life Insurance Solutions
- Property & Casualty Consulting Services

No matter the CBIZ services you utilize, we pledge to provide exceptional service focused on individual attention, responsive action, and proactive assistance. We always strive to exceed your expectations.

While our performance standard is consistently monitored and adhered to, your CBIZ Employee Benefits account team will also hold an Annual Performance Review meeting to measure the effectiveness of past initiatives and outline new strategies. This comprehensive approach is instrumental in creating a culture of healthier, happier employees.

Core Values



**WE DO THE
RIGHT THING**



**OUR PEOPLE
MATTER**



**WE ARE DEDICATED
TO THE SUCCESS OF
OUR CLIENTS**



**WE EXPECT
TO WIN**



**WE ARE
ONECBIZ**

Dedicated to the Success of Our Clients

One of our key core values is that we are dedicated to the success of our clients. As such, your satisfaction is extremely important to us. We work diligently to provide exceptional customer service to our clients, scheduling regular, ongoing calls to ensure projects are progressing and all questions and concerns are addressed in a timely, comprehensive manner. These calls also provide a proactive means of addressing any upcoming reporting or compliance requirements.

CBIZ's client service team provides guidance and support for all client-related activities, setting rigorous performance and service standards by which all CBIZ professionals operate.

We believe the ultimate measure of service quality and client satisfaction is the high level of retention of our clients, which is well above the industry average.

CBIZ by the Numbers

- 120+ Offices
- 7,000+ Team Members
- 82,000+ Clients
- 84 Workplace Awards in 2022
- Top 10 Largest Accounting Provider Nationally (1)
- Top 30 Largest Broker of U.S. Business (2)
- Top 4 Institutional Consulting Team (3)

At CBIZ, our product is time and expertise, and we have invested significantly in our resources to provide our clients with strategic guidance, ongoing support and real results. Together, we can develop and maintain a solid partnership built on mutual trust and measurable outcomes.

Sources:

- 1 *Accounting Today* – March 2023
- 2 *Business Insurance Magazine* – July 2022
- 3 *Barron's Top Institutional Consultants* – 2022

Rankings and recognition by unaffiliated third parties may not be representative of a CBIZ Investment Advisory Services' client experience and should not be construed as a guarantee of a certain level of results. Neither CBIZ IAS nor its advisors pays a fee to the third party in exchange for the rating.

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.

Yes. We will work in coordination with all County Departments to support all needs as noted above. CBIZ will provide comprehensive RFP and marketing services - from goal setting to a final written analysis of our market findings to the implementation of a new vendor if one is selected. We are with you every step of the way. We draft our RFP documents to reflect your unique goals and objectives and any particular issues that you would like to see resolved. Our written analysis of the bids and finalist interviews will help lead Jackson County to a selected vendor. Once this is accomplished, we will stay in ongoing communication with the carriers/vendors to ensure they deliver according to final negotiated provisions.

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

Whether entering into a renewal contract or switching to a new vendor, CBIZ will coordinate and manage the implementation process and the ongoing vendor relationship for Jackson County.

We will assume the following tasks:

- Schedule planning and implementation meetings with vendors as needed
- Coordinate eligibility data requirements and timing
- Order vendor benefit booklets and/or certificates, ID cards
- Review administrative forms and billing
- Request and review contracts, plan documents, and other vendor materials
- Provide ongoing employee support for claims, customer service, etc.
- Proactively identify issues before they become problems
- Establish service level expectations and negotiate performance guarantees as appropriate

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

Yes, CBIZ will assist in analyzing vendor capabilities to determine if they are a good fit for Jackson County. We have experience implementing and working with all the major carriers and vendors and will assist with researching, vetting and advocating for the county during the marketing process. We will support the County's interests in examination of State Pools or Consortiums, too.

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.

The most competitive pricing is achieved when a vendor becomes a partner with Jackson County. Our responsibility is to develop these relationships to the fullest. For prospective partners, CBIZ must paint the picture of why Jackson County is the most attractive group to insure. For current partners, CBIZ will enrich the

relationships through collaborative development of strategic plans. Activities prior to the renewal negotiations such as vendor summits and development sessions. Further, regularly scheduled partner updates allow CBIZ to aggressively achieve the most cost-effective pricing for all plans and programs at renewal. As one of the largest purchasers of insurance and related products and services, our clients benefit from preferred level pricing and service models from both national and regional insurance companies and other vendors. Jackson County will benefit from both our strategic approach and our significant volume placements.

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.

CBIZ will attend, coordinate, and prepare agendas for selected meetings of all involved parties. This is included in our standard scope of services.

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.

The County employees deserve a quality benefits package. At the same time, cost-containment solutions can help reduce and manage overall risk to employer health plans. These solutions lead to more innovative plan design and better overall outcomes. In order for an employer's health care ecosystem to achieve these outcomes, the employer's plan should include tactics that:

- Protect against unnecessary spending due to fraud, waste and abuse
- Provide structured and reasoned access to primary care
- Guide urgent and emergent care to the most efficient and cost-effective site of care (e.g., telemedicine, urgent care)
- Construct a care coordination methodology that handholds patients through health care navigation and care delivery decisions for both routine and complex matters, as well as creates a 360-degree composite view of the patient as a unique individual
- Promote value-based care for situational diagnoses (e.g., low back pain, diabetes, dialysis)
- Align benefit deliverables with evidence-based medicine and proper diagnosis for high dollar and catastrophic conditions (e.g., birth abnormalities, cancer, autoimmune conditions)
- Account for health care system outliers and have a plan to negotiate and contest their impacts on overall health spend
- Manage the pharmacy contracting and purchasing process to ensure the best overall drug procurement strategy
- Collect and analyze ongoing data to deduce patterns, trends and opportunities regarding overall ecosystem performance
- Benchmark current plans, costs, and utilization against national and regional benchmarks and other municipalities

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

While Jackson County's CBIZ service team will provide ongoing support throughout the year, CBIZ recognizes that there are many tasks in the Renewal and Open Enrollment timeframe. CBIZ will assist Jackson County in all the major areas involved in Open Enrollment, including but not limited to:

- Development of Open Enrollment Communications
- Employee information presentations
- Carrier implementation
- Carrier file feeds
- And more.

CBIZ will also assist in providing any guidance and information for Jackson County to be able to update the enrollment system where applicable. At the outset, we will identify specific short-term and long-term communication objectives, and choose ways to make small but measurable changes now that will ultimately lead to long-term, sustained change.

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.

Open Enrollment

Open enrollment is a key component of employee involvement and appreciation of the benefit offerings. We are intimately involved in the process. As consultants to a variety of different organizations, we have tremendous hands on knowledge of effective communication processes designed specifically for the wide range of support personnel required. We will coordinate enrollment meetings designed to maximize employee participation and ensure materials and benefit packages are compliant for your full-time, year-round and seasonal employees. CBIZ provides qualified personnel with the necessary knowledge and experience to conduct or assist in annual open enrollment meetings as well as new employee orientation meetings. To assist with the communication process, CBIZ will:

- Coordinate the enrollment process with vendors including eligibility data;
- Develop employee communication materials including announcement letter, benefit summaries and custom materials as needed;
- Determine what bilingual needs may be required;
- Provide personalized enrollment forms or an enrollment checklist for each employee showing benefit options and costs;
- Review vendor and/or client enrollment materials;
- Identify enrollment capabilities - internal or outside vendor;

- Facilitate employee meetings including webinars, PowerPoint presentation, carrier attendance and supplies;
- Provide vendor interface throughout the enrollment season.

Depending on the scope of the services required, CBIZ can also propose a variety of benefit counselors and communication vendors that are designed to increase employee engagement in benefit plan offerings. CBIZ will work with Jackson County to determine how to best meet the needs of your employee population. CBIZ understands employee education and the employee's understanding of the benefit plans is crucial. Successfully educating employee's leads to a better understanding and use of the benefit plans by employees; this leads to happier and healthier employees. To help with the education process of open enrollment each year, CBIZ provides a customized employee enrollment guide. This guide has all pertinent information on eligibility, carrier networks, plan designs/benefits offered, carrier extras, compliance requirements, and contact information. These booklets become a one-stop-shop for all benefits information and employee needs. To go along with the enrollment guides and in-person meetings, CBIZ also provides live and recorded webinars to help educate employees. CBIZ understands schedules can be tough and sometimes employees can't make an in-person enrollment meeting. These tools can also be useful for new hires and spouses to watch.

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.

When it comes to employee benefits compliance, CBIZ has you covered.

We know that keeping up with rapidly changing employee benefits regulations is no simple task. That's why CBIZ believes in making a continuous investment in compliance and regulatory resources — to make your life easier as you strive to maintain compliance.

Our dedicated Regulatory Affairs & Compliance Services team, led by Karen McLeese, Esq, consistently monitors and provides guidance on state and federal laws that may impact your employee benefits program. You'll receive efficient, ongoing support from in-house specialists so you can avoid the burden of billable hours from traditional legal resources.

Karen McLeese, Esq, practice lead for CBIZ's Regulatory Affairs & Compliance Services, brings with her more than two decades of experience and distinct expertise in reviewing and interpreting federal and state legislation impacting employee benefits.



[Learn More About Karen McLeese](#)

Compliance Resources

CBIZ clients receive various compliance resources on a monthly, annual and ad hoc basis, including the proprietary “For Your Benefit” annual compliance manual, “At Issue” and “Benefit Beat” newsletters, “Health Reform Bulletins” and more.



Browse our library of ["Benefit Beat" articles](#).

ACA Support

The Affordable Care Act (ACA) impacts every aspect of a group health plan, including plan design and eligibility, funding and tax issues, reporting and disclosure requirements. The coming years will further define the fate of the ACA, and we stand ready to guide you through any new modifications or repeals that may occur.

Compliance Tools



Health Reform
Checklist



6055/6056
Reporting



ACA Financial
Analysis

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.

As part of our ongoing strategic consulting process, we meet with you to learn of your objectives, discuss options and programs in the marketplace, and collaborate with you to develop a 3-year strategy to accomplish your goals. Our specialized approach gives us the ability to see many different benefit scenarios, each unique, each looking for a custom-fitted solution. Our reputation for providing innovative solutions to municipalities along with the number of clients in this space grew quickly through referrals from one client to another. We bring intimate, hands-on knowledge of the local benefits marketplace, the competitive edge to attract and retain the highest quality personnel, and the ability to quickly access national, technical resources. The

strategic plan and process is reviewed, updated, and amended each year during our Annual Performance Review meeting, and as business needs and priorities change.

Employee benefits are a substantial investment affecting multiple facets of your business, from organization morale and employee retention to administrative efficiency and ultimately your bottom line.

- “For Your Benefit” annual compliance manual
- “At Issue” and “Benefit Beat” communications
- CBIZ Health Reform Bulletins
- The Annual Compliance Checklist
- Timely webinars throughout the year

That is why CBIZ begins each engagement with benefit and human resource objective setting, to ensure that your benefit initiatives support your organization’s business and financial objectives.

Rather than supply packaged solutions, we will collaborate with you to develop a customized action plan to achieve the goals you set. This process typically begins with stakeholder interviews and either conducting or reviewing the County’s current employee engagement survey results.

Actuarial Services

Rather than simply forwarding carrier reporting, CBIZ has a robust in-house actuarial and financial reporting team. Our actuarial team helps our client’s better budget and prepare for health care costs each year and perform prospective renewal calculations based on current claims data. Our team provides actuarial services that support and supplement our benefit review and analysis. We help analyze current plan costs against the marketplace, develop premium equivalent rates, analyze carrier renewals, and develop an actuarially sound contribution structure. Finally, we can identify the issues driving plan costs and recommend responses that are tailored to address the causes. You will have access to experts who can assist with the following items:

- Projecting financials and claims / Pricing and reserve calculations
- Independent underwriting renewal calculation based upon claims/utilization
- COBRA rate development
- Stop-loss and pooling risk level determination
- Modeling plan design changes, migration studies, and contribution strategies
- Assessing the financial impact of COVID-19 based on employer and employee characteristics

Funding Arrangements

Your dedicated consultants and service team have valuable expertise working with various funding arrangements. Our clients range from being fully insured, to hybrid insured, to fully self-funded. We are skilled at utilizing the data available to us to help the County determine the best funding strategy. CBIZ are experts in evaluating program design, contracting, and funding techniques that are conducive to cost containment while providing a quality package for employees. This includes multiple plans that increase flexibility, and cutting-

edge components of flexible benefit and cafeteria plans. We have the tools, experience, and intellectual capital to monitor the performance of the plans, forecast expenditures with consistent accuracy, identify areas for improvement with network discounts and administrative services and obtain aggressive pricing terms within the markets.

The team assigned to Jackson County has extensive experience working with groups of all funding arrangements and is very adept at illustrating and guiding clients through a funding strategy conversion.

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.

We will continue to provide monthly reporting of plan financial performance. CBIZ will provide an integrated utilization report annually including a comprehensive review, projections and modeling.

Reporting is a critical component in monitoring the effectiveness of health and welfare benefit plans. CBIZ provides periodic (monthly, quarterly, semi-annual) and year end historical comparisons as well as financial and utilization reports and analyses. CBIZ can also create and generate special reports as needed or requested.

Quarterly Reports/Meetings: Monthly Reports/Meetings: Annual Reports/Meetings:

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Reserve Valuation • Top 20 Conditions/Providers • Case Management Review • Projected Year-End Forecast • Pended Claim Reports | <ul style="list-style-type: none"> • CBIZ Data Analytics Tool/Cotiviti Predictive Modeling • Dashboard Report • Monthly Financial Overview and Funding Comparison • General Plan Performance/Expense Overview • Large Claim Report • Lag Reports • Utilization Data Analysis • Emerging High-Cost Claim | <ul style="list-style-type: none"> • Financial Comparison • Benchmark Review/Analysis • Performance Standard Review/Stewardship Report • Wellbeing Scorecard • Strategic Review • Generational Analysis • Monte Carlo Stop Loss Analysis • Performance Standard Review |
|---|---|--|

Reports provided by carriers and vendors are available and monitored on a regular basis by CBIZ, but our reporting is customized to Jackson County.

CBIZ is very comfortable presenting claims and utilization reporting at appropriate detail levels to legislature, committees, and boards, as this is often part of our client engagements with municipalities.

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.

This is provided within our standard scope of services.

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.).

As outlined in Section 4.8, CBIZ has a full staff of Regulatory Affairs personnel that provides guidance with all Governmental mandates, including COBRA, HIPAA, etc. The service team will also assist in ongoing communications with any COBRA and Section 125 vendors on behalf of the County.

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.

As outlined in section 4.9, CBIZ will continue to provide a robust actuarial team who will have access to carrier reporting and powerful information tools.

DATA ANALYTICS

Access to comprehensive data is crucial for evaluating the competitiveness of your benefits plan and uncovering opportunities for improvement and cost reduction. CBIZ understands the significant value of data, so we offer our clients access to industry-leading insights, tools and technology.

Benchmarking Data

To help you determine how your benefits strategy stacks up, our team provides detailed information on key health care trends in our annual benchmark report. This comprehensive resource contains valuable data related to health plan usage, medical and Rx cost-containment strategies, trending benefits and more.

In addition to our annual report, our clients regularly have access to industry benchmarking reports offering insight into your competitors in the marketplace. Through various filters, we can deliver the information that is most pertinent to your organization regarding plan design, enrollment, funding mechanisms, employer-employee costs and more. While this raw data is easily accessible across the benefits brokerage industry, it is our expert analysis of this data and subsequent tactical implementation of data-driven initiatives that is second to none.

Priority Forecasting Tool

Along with benchmarking data, our clients have access to our priority forecasting tool, which uses cutting-edge technology to offer actionable insights to inform population health management decisions. This tool empowers our clients to continuously cut health care costs by improving the health and financial security of employees and their families.

Cutting-Edge Technology

To top off our data resources, CBIZ experts have access to a cutting-edge platform coupled with the knowledge of client service experts. This total solution drives savings opportunities by providing financial reporting and the tools plan sponsors need to effectively adhere to the Consolidated Appropriations Act.

Benchmarking Data

- 1 | key health care trends
- 2 | competitor insight
- 3 | expert analysis

Priority Forecasting

- 1 | cut health care costs
- 2 | financial security

Cutting-Edge Technology

- 1 | client service experts
- 2 | savings opportunities



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.

In our routinely scheduled Compliance Meeting with the County, we will summarize the notices that a non-ERISA plan like the County is required to share with employees, take stock of the current distribution processes in place, and make recommendations for any outstanding documents that need to be distributed to employees both during open enrollment and throughout the year. We will work with HR to ensure documents are distributed in the most streamlined manner possible, while maintaining compliance with both paper and electronic distribution rules as delineated by the Department of Labor.

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.

Communication is all about delivering the right message to the right audience at the right time. The end goal? Driving meaningful employee action. To help you connect with and empower your employees, CBIZ offers a range of in-house communication solutions.

Our communications solutions are intended to simplify your benefits messaging, effectively navigate open enrollment, help you widen your reach with a multi-channel approach and ensure continual improvement with trackable software and data analytics.

Open Enrollment & Employee Communications

Working together with your HR team and benefit vendors, we'll provide concise, customized written communications highlighting the crucial elements of your benefits program.

Your Communication Package

Effective communication requires the use of consistent branding, design and messaging specifically catered to your organization's distinct employee population and needs. Our employee communication package includes our Open Enrollment Guide and New Hire Guide, in addition to open enrollment postcards and flyers. Digital communication engagement options and open enrollment communications are outlined below. See "Additional Communication Services" section for information on premium services provided for an additional fee.

Employee Communication

- 1 Short Digestible Content
- 2 Multi-Media Channels
- 3 Proactive Timeline and Planning
- 4 Resource Inventory
- 5 Data Analytics

We offer the knowledge and industry expertise needed to handle your critical communication matters, and our subject matter experts provide guidance on appropriate strategies, applicable innovations, technology considerations and more.

Digital Communication & Engagement Options

Your workforce demographics likely span across multiple generations, and each employee brings with them a unique style of learning and a preferred method of communication. Our multi-channel approach leverages traditional print materials, digital resources, social media and more to help you widen your reach and connect with each employee effectively.

- **Educational Video Library** — online library of 50+ English and Spanish videos on various benefits, HR, and training topics
- **Presentations and Webinars** — access to 24/7 scriptable benefits presentations and webinars for large groups, new hires and spouses
- **FlippingBook** — transform files into digital, interactive online publications with data tracking capabilities for employee communication and benefit guides

Your benefits team will help you:

1

Coordinate

Coordinate enrollment process and capabilities with vendors, including eligibility data

2

Develop

Review vendor/client enrollment materials and develop employee communications

3

Facilitate

Facilitate employee meetings and presentations, carrier attendance and supplies

Our standard communications services are bundled in our scope of services and pricing.



Premium Communications Services

Our Process

- 1 assess
- 2 collaborate
- 3 develop
- 4 drive meaningful employee action

CBIZ Total Rewards Communications Practice is passionate about helping you leverage quality communications and clear messaging to achieve enhanced employee retention, increase the perceived value of your benefits and strengthen your ability to attract new hires. Our team of subject matter experts offers the knowledge and industry expertise needed to solve your critical communication matters and can weigh in on appropriate strategies, applicable innovations, technology considerations and much more.

Our Process

We'll begin your project by thoroughly assessing your organization, culture, priorities, employee demographics and values. We'll then collaborate with you to develop a strategic communications plan specifically designed to help your organization drive meaningful employee action.

Additional Communication Services

CBIZ Total Rewards Communications Consulting also offers more advanced communication services for an additional fee. Some of the most common projects our experts handle include:

- Personalized branding
- Year-round communications campaigns
- Communications assessments
- Mobile app implementation and support plan
- Customized benefits websites
- Custom videos
- Change communications
- Mailers
- Data-driven benefit portals
- Decision support tools
- Newsletters



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.

CBIZ is adept at working through claims issues to ensure the contracted benefits are fully resolved on behalf of the County, its employees and their families. This is provided within our standard scope of services. All CBIZ Account Team members are trained and regularly advocate for our clients when claims issues arise. CBIZ will ensure HIPAA authorizations are in place when necessary.

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.

Our CBIZ service team is available and ready to assist with these issues as necessary. Our client engagements see us advocate for our clients and their employees to help resolve claim or provider service issues, as well as billing concerns – whether they be monthly premium invoices paid by the client or a claim billing issue that needs additional intervention on behalf of an employee or their family.

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.

Our scope of services includes preparation and facilitation of annual reporting requirements including but not limited to 5500 preparation, Form 720 reporting, and other regulatory notices and filings.

We understand that a large government entity like Jackson County will have substantial needs related to compliance. Utilizing experience, expertise and the tools described herein, we will provide you outstanding support for compliance. We provide both monthly communications and ad-hoc memoranda drafted by our Regulatory Affairs group to keep you in the know about all the compliance and legislation changes that directly affect you. Commonly for clients like Jackson County, we have a standing monthly conference call to review pending or enacted legislation. Doing so allows us to adjust policies, procedures and workflows in a timely manner.

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.

CBIZ will always work collaboratively with other partners on behalf of the County, as directed.

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.

Low employee wellbeing is a top contributor to rising health costs. As a result, employers must embrace a new paradigm to manage increasing risks and costs in a highly competitive environment. That's why we've created one of the most comprehensive and innovative wellbeing consulting practices in the market.

The CBIZ Engagement & Wellbeing Consulting Practice takes an integrated approach that moves beyond the measurement of physical wellness to include a holistic wellbeing strategy of social, physical, financial, career, and community health.

Our Team

Our wellbeing team represents the culmination of more than 20 years of experience working with some of the most innovative and expert minds in the health-improvement arena. We are proud to be a wellbeing partner and advocate for thousands of employers looking to create a thriving workplace culture and improve employee engagement.

What We Do

Our consultants use actionable data to recommend environmental changes, assess new benefits and solutions and increase engagement.

- **Data-Driven Approach:** Our customized solutions include a variety of data-driven assessments and analyses, evidence-based interventions, practical tools, and empirical measurement to deliver results.
- **Collaborative Partnership:** Standard to our scope of services is a dedicated Wellbeing Account Manager who will partner with you to assess what you need to create and maintain a dynamic culture through your wellbeing program.
- **Emphasis on Employee Engagement:** A successful wellbeing strategy requires a continued commitment to reach all employee segments and their families in meaningful ways. To assist with this, CBIZ provides ongoing education including an annual wellbeing webinar and monthly Wellbeing Insights Newsletters.



Measurable Results

Your CBIZ wellbeing specialists will develop metrics using actionable data from your employee population to measure awareness, engagement, participation and employee satisfaction in all wellbeing initiatives.

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

CBIZ can conduct a variety of surveys if requested. Our most common surveys solicit employee 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 a survey, CBIZ will provide guidance on constructing and administering it to employees. We also have third party resources we may use should it be beneficial for a survey to come directly from CBIZ to your employees. CBIZ surveyed Jackson County's employee population in March. The results of the survey will be used to help drive strategy.

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



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

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.

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.

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.

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.

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
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
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
Benchmarking Comparison & Analysis	Included
Employee Contribution Strategy Development	Included
More Robust Self-Funded Actuarial Support (Dedicated Financial Analyst, Monte Carlo Analysis, Funding Rate Development, etc.)	Included
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.

Your Local Team



Carolyn Watley

Vice President, Relationship Manager
(816) 945-5186, cwatley@cbiz.com

During her over 30-year tenure with CBIZ, Carolyn has held many roles ranging from Office Manager to Manager of Corporate Accounts to Chief Facilitating Officer. During this time, the company grew into the largest employee benefits consulting firm in the Kansas City area with over 100 employees. Carolyn was appointed to President of CBIZ Benefits & Insurance Services of Kansas City in 1999 and served in this role for 17 years. Carolyn currently serves as the Vice President of Community Engagement. In this capacity, Carolyn focuses on public-facing business development initiatives; board participation roles; and community stewardship.



Jeff Fousnough

Team Lead and Managing Director
(816) 945-5505, jfousnough@cbiz.com

Jeff began his career serving clients in 1992 at a boutique commercial insurance brokerage firm, Gilbert-Magill Company, which was acquired by Hays Companies in 2000. His career includes working with a diverse range of business entities from small business owners to publicly traded corporations with market capitalizations in excess of \$5B.

In 2009, CBIZ Benefits & Insurance added Jeff to its team as Director of Sales for the Midwest. In 2012, Jeff became the Director of Business Development/Key Accounts for the Kansas City Benefits Practice Group. In this role Jeff works as an advocate for his and our clients. As a member of the client's consulting team, Jeff leads the delivery of solutions working with our teams of professionals and consultants both within our Benefits Group and across the different CBIZ disciplines. In 2020, Jeff became an enterprise wide, Managing Director, helping our clients gain exposure and introduce subject matter experts to develop unique solutions across the entire range of CBIZ services locally and nationally. In addition to his relationship management responsibilities, he is committed to keeping current with our clients unique and evolving needs.



Matt Krull

Co-Team Lead & Senior Benefits Consultant
(816) 945-5222, mkrull@cbiz.com

Over the course of 23 years, Matt has built a reputation as a trusted and knowledgeable employee benefits consultant. His expertise spans various areas, including plan design, compliance, cost containment strategies, Captive and self-funded arrangements, pharmacy benefits consulting and overall benefits program management. By staying abreast of the ever-evolving landscape of employee benefits, Matt has consistently

provided invaluable guidance to large employers seeking to enhance their offerings while prioritizing the well-being of their workforce.

Throughout his career, Matt has developed a deep understanding of the unique challenges faced by employers in different industries. His ability to tailor solutions and recommendations to meet specific client needs has resulted in long-standing partnerships and a track record of successful outcomes. Moreover, his keen analytical skills, attention to detail, and ability to communicate complex concepts in a clear and concise manner have positioned him as a go-to resource for both colleagues and clients.



Melodie Kelley

Director of Client Services – Kansas City, MO
(816) 945-5223, mkelley@cbiz.com

Melodie began her career with CBIZ (formerly Robert D. O'Byrne & Associates, Inc.) over 30 years ago as a service representative. After experiencing and learning all aspects of servicing and administration for clients ranging in size from 2 – 5,000 employees, Melodie holds the title of Director of Client Services where she serves as a mentor and leader to the entire client services department for the local Kansas City office. Melodie is responsible for the overall retention and growth of the current client customer base and oversees the delivery and quality of services provided. She also serves as a technical expert and is responsible for staff recruitment and development, while working closely with local and national leadership within CBIZ.



Jonathan Krass

Co-Account Executive
(816) 945-5395, jkrass@cbiz.com

Jonathan brings nearly 20 years of experience managing benefits and client relationships as a consultant with mid- to large-market clients. Jonathan has a broad spectrum of client experience, working with both public and private entities across all funding types. Jonathan has in-depth expertise in developing benefits programs, designing cost containment strategies, and communicating to clients and employee groups. Jonathan also brings very strong financial and technical abilities when analyzing renewals and financial strategies.

For his clients at CBIZ, Jonathan leads annual and multi-year strategy, manages all aspects of client programs with his team, and negotiates with carrier/vendor partners to provide the best, most cost-effective solution to fit clients' needs.



Tiffany Adams

Account Manager
(816) 945-5261, tiffany.adams@cbiz.com

Tiffany joined CBIZ in February of 2021 in the Employee Benefits Division as an Account Coordinator. She was quickly promoted to Account Manager the following year. Tiffany is responsible for day-to-day service, open enrollment, managing the marketing process, employee communications and general administrative issues.

Prior to joining CBIZ, Tiffany gained invaluable knowledge working in the insurance industry. Over the last 6 years, she experienced servicing both the individual insured and employer group sector.



Dave Coleman

Senior Actuarial Analyst
(816) 945-5225

Dave joined CBIZ Benefit & Insurance Services as a Senior Actuarial Analyst in 2013. His focus is on conducting quantitative and qualitative research of information affecting claims, plan designs and overall performance of CBIZ's group benefit clients. He also interprets findings, prepares reports, and formulates recommendations, as well as presenting the results to clients.



Abby Stevenson

Wellbeing & Engagement Account Executive
(816) 945-5461, astevenson@cbiz.com

Abby helps clients develop and implement strategies to build and maintain a culture of total wellbeing. She works collaboratively with clients and vendor partners to develop effective and sustainable wellbeing solutions with the goal of helping individuals live healthier, more productive lives. She plays a significant role in educating clients and key partners about the value of worksite wellbeing programs and the strategies to achieve high levels of employee engagement.

National Resources



Michael Zucarelli

National Pharmacy Director

A licensed and practicing pharmacist, Michael is the point person for the analysis and support of all Rx and Pharmacy Benefits Management projects, including benefit management for self-insured plan sponsors. He is your advocate for vendor accountability against the rising cost of prescription drug benefits, an ongoing hurdle for organizations across the nation. Michael also collaborates with local consultants and actuarial teams to develop financial models that have saved our clients as much as 20 percent in annual pharmacy spend.



David Rubadue

National Director of Actuarial Services

Dave leads CBIZ's robust in-house actuarial team. In his role, he is responsible for keeping the team up-to-date and well-versed on how to identify the multitude of issues driving plan costs. This includes projecting financials

and claims and budgeting for yearly health care costs by analyzing current plans against the marketplace. By assessing the financial impact of Health Care Reform based on employer and employee characteristics, Dave and his team can project penalties, tax implications and other costs.

Karen McLeese, ESQ.



Vice President – Employee Benefits Regulatory Affairs

Karen ensures our team members receive ongoing support in the monitoring of state and federal regulations regarding employee benefits. This includes the review and interpretation of laws, court decisions, administrative rulings, and pronouncements to ensure each plan is fully compliant. As a leading expert in Employee Benefits compliance and a nationally published author, Karen is responsible for the For Your Benefit Book, At Issue, Benefit Beat, and Health Reform Bulletin educational materials. While Karen is a national resource for all our clients, she lives in Kansas City and is involved in the community.



Julie Fulton

Director of Wellbeing and Population Health Management

Julie leverages her clinical and business experience to provide overall vision to the Wellbeing Consulting team. She is accountable for enhancing employer benefit packages and employee culture through the use of analytics and wellbeing solutions. Julie facilitates collaboration between the CBIZ EB & National Practice teams, carriers, TPAs, vendors, and client stakeholders to assess the data and identify innovative, cost-effective programs aligned with the mission & vision of each organization. She is committed to simplifying the healthcare experience for employees to inspire them to take an active role in optimizing their wellbeing.



Alex Lanning

Director of Communications

As Director of Communications at CBIZ Employee Benefits, Alex works with clients to develop effective benefits communications strategies that drive action and employee engagement. Alex and a team of communications professional's work with each client service team to develop custom employee communications materials and multimedia strategies tailored to the needs of the specific employee population.

Her team is skilled at developing benefits communications campaigns, which include creating a communications calendar, benefits branded materials, digital benefit guides, informative flyers, and benefits websites. Alex received her Bachelor of Science in Journalism and Business from the University of Kansas.



Erin Eason

Director of Clinical Consulting

As the National Director of Clinical Consulting Services, Erin is considered an expert in the field and is frequently asked to speak about employer-sponsored health care at local, regional and national conferences. She has also been asked to sit on multiple advisory panels and is a member of the Healthy KC Workplace Wellness Action Team.

Erin leverages her clinical, healthcare technology and process experience to her role to assist her in making relevant and realistic recommendations to ensure the highest levels of integration and operational effectiveness in order to help her clients reach specific and measurable goals.

Erin also maintains a Life and Health Insurance license.

REFERENCES



Client Name: City of Blue Springs
Contact: Christine Cates, City Administrator
Email: CCates@bluespringsgov.com
Phone: (816) 228-0140

Client Name: City of Independence
Contact: Bryan Kidney, Director of Finance
Email: Bkidney@indepmo.org
Phone: (816) 325-7173

Client Name: Clay County
Contact: Dianna Wright, County Administrator
Email: dwright@claycountymo.gov
Phone: (816) 407-3600

Client Name: Kansas City Board of Public Utilities
Contact: Dennis Dumovich, Director of Human Resources
Email: Dennisdumovich@bpu.com
Phone: (913) 573-6915

Client Name: Kansas City Public Schools
Contact: Linda D. Quinley, Chief Financial & Operations Officer
Email: lquinley@kcpublicschools.org
Phone: (816) 418-7775

Client Name: University Health
Contact: Troy Angell, Senior Director
Email: troy.angell@uhkc.org
Phone: (816) 404-8311

EXHIBITS

EXHIBIT A – SCOPE OF SERVICES

EXHIBIT B – SAMPLE COMPLIANCE MATERIALS

EXHIBIT C – BENCHMARKING RESOURCES

EXHIBIT D – COST CONTAINMENT STRATEGIES

EXHIBIT E – EMPLOYEE COMMUNICATION SAMPLES

EXHIBIT F – SAMPLE RENEWAL PRESENTATION

EXHIBIT G – SAMPLE SERVICE TIMELINE

EXHIBIT H – SAMPLE ANNUAL PERFORMANCE REVIEW

EXHIBIT I – REPORTING SAMPLES

EXHIBIT J – SAMPLE WELLBEING RESOURCES





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.

	<p>In-house regulatory affairs attorney and staff</p>		<p>Creation of strategic custom communications plan</p>
	<p>Monitor and communicate on relevant state and federal legislation</p>		<p>Coordination of enrollment resources</p>
	<p>Consistent compliance and Health Care Reform education materials</p>		<p>Ongoing creation of communication deliverables</p>
	<p>Enrollment and administration compliance support</p>		<p>Vendor and technology support</p>

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



COMPLIANCE PUBLICATIONS

Benefit Beat - 2011 through current

Home / Insurance & HR / Services / Employee Benefits / Regulatory & Compliance Support / Benefit Beat / 2011 through Current

COST OF LIVING ADJUSTMENTS

November 09, 2023

2024 COLAs - Health FSA, Qualified Transportation and More

On November 9, 2023, the IRS released the 2024 inflationary (cost of living) adjustments for several types of benefits.

[Read More](#)

November 08, 2023

Washington Paid Family Leave Premium Rate Decreases in 2024

In a recently issued press release, the Employment Security Department indicates that premium rates will slightly decrease.

[Read More](#)

November 08, 2023

New Jersey TDI and PFL rates for 2024

Contributions for temporary disability remain the same as 2023 while contributions for paid family leave increase in 2024.

[Read More](#)

November 08, 2023

New York Paid Family Leave Updates for 2024

New York updates its contribution and benefit amounts for paid family leave in 2024.

[Read More](#)

November 08, 2023

Massachusetts' Paid Family Leave allows Top off and Other Updates

Beginning November 1, 2023, employees will be permitted to top off his/her weekly benefit amount and benefit.

[Read More](#)

2024 COLAs - Health FSA, Qualified Transportation and More

Home / Insights / Articles / Article Details Printable Version

On November 9, 2023, the IRS released the 2024 inflationary (cost of living) adjustments relating to several types of benefits. Below are select highlights from IRS [Revenue Procedure 2023-34](#).

Flexible Spending Account (FSA) Cap. The limit on the amount that can be contributed to a health flexible spending account (FSA) through voluntary salary reductions for plan years beginning in 2024 increased to \$3,200, up from \$3,050 in 2023.

Carryover. For cafeteria plans that permit a carryover of unused amounts, the maximum carryover limit is increased to \$640 in 2024, up from \$610 in 2023.

As a reminder, dependent care assistance plan (DCAP) contributions are not subject to cost-of-living adjustments and are \$5,000 or (\$2,500 if married filing a separate return). These contributions are based on calendar year not a plan year.

Qualified Transportation Fringe Benefits. With regard to transportation expenses reimbursed by an employer and excludable from the employee's income under a qualified transportation program, the limits increase for 2024:

	2024	2023
Commuter Highway Vehicle (van pooling) and Any Transit Pass	\$315	\$300
Qualified Parking	\$315	\$300

As a reminder, the Tax Cuts and Jobs Act (TCJA) suspended the employer's deductibility of qualified transportation expenses, effective January 1, 2018. The tax exclusion available to employees remains applicable. In addition, the TCJA suspended the qualified bicycle commuter benefit from December 31, 2017 through December 31, 2025. An employer sponsoring a qualified bicycle fringe benefit plan can still take a tax deduction (up to \$20 per month, or \$240 annually) for reimbursing participating employees who use a bicycle for traveling between their home and place of employment. However, these amounts can no longer be excluded from the employee's income.

Qualified Adoption Assistance Reimbursement Program (IRC §137). An employer-provided adoption assistance program that meets the qualifications of IRC §137, allows participants to recover expenses relating to adoption, such as reasonable adoption fees, court costs, attorney's fees and traveling expenses. Below are the exclusion limits and AGI phase-out limits for 2024 and 2023:

	2024	2023
Exclusion Limit	\$16,810	\$15,950
AGI Phase-out Limits	Between \$252,150 and \$292,150	Between \$239,230 and \$279,230



BENCHMARKING RESOURCES

- Aegis Risk Medical Stop- Loss Premium Survey
- BenefitFocus The State of Employee Benefits Survey
- BLS National Compensation Survey: Employee Benefits in the United States
- Gallup State of the American Workplace
- Mercer National Survey of Employer-Sponsored Health Plans
- Employer Health Benefits Annual Survey (KFF)
- Employee Benefits Survey Results (IFEBC)
- MetLife Thriving in the New Work-Life World

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Health Plan Costs (cont.)

PERCENTAGE OF EMPLOYERS UTILIZING TYPES OF HEALTH CARE COST-MANAGEMENT TECHNIQUES

Administrative / Data Analysis Initiatives	% of Employers
Health care claims audits	42.6%
Health care claims utilization analysis	60.1%
Predictive modeling	25.5%
Cost Sharing	% of Employers
Two tiers for cost sharing	34.0%
Three tiers for cost sharing	20.3%
Four tiers for cost sharing	18.7%
Five or more tiers for cost sharing	3.4%
Plan Design / Program Initiatives	% of Employers
Dependent eligibility audits	37.2%
Opt-out incentives	12.2%
Spousal surcharge / carve outs	13.8%
Purchasing / Provider Initiatives	% of Employers
Centers of excellence	37.1%
Direct contracting with health care providers	15.4%
Health care coalitions / purchasing groups	13.1%
Domestic medical travel / tourism	5.1%
Narrow networks	7.9%
Price transparency / comparison tools	36.5%
Provider health care quality initiatives	13.2%
Reference-based pricing	4.4%
Telemedicine	80.3%
Tiered provider networks	12.1%

[Discover how you can manage your health care costs by downloading our interactive infographic, Cost-Saving Strategies to Stretch Your Benefit Dollars.](#)

2023 Employee Benefits Benchmarking Report | 35

Health Plan Design

Designing an effective and competitive health plan will be essential to maximizing your health care spend and attracting and retaining top talent in 2023.

AVERAGE ANNUAL DEDUCTIBLE FOR SINGLE COVERAGE AMONG ALL COVERED EMPLOYEES

Year	Average Annual Deductible
2018	\$1,573
2019	\$1,655
2020	\$1,644
2021	\$1,669

PERCENTAGE OF ALL EMPLOYERS OFFERING AT LEAST ONE OF THESE PLANS

Plan Type	Percentage
PPQ/PDS	79%
HSA CDHP	58%
HRA CDHP	8%
HMO	20%

PERCENTAGE OF COVERED EMPLOYEES ENROLLED IN EACH PLAN

Plan Type	Percentage
PPQ/PDS	51%
HSA CDHP	33%
HRA CDHP	5%
HMO	11%

BENCHMARKING RESOURCES



2023 Employee Benefits Benchmark Report

2023 Employee Benefits Benchmark Report

Family-Friendly Benefits

Recent regulatory changes have shined a spotlight on family-friendly benefits, and more and more employers are expanding their offerings to include various family-centric perks.

PERCENTAGE OF ALL EMPLOYERS PROVIDING PARENTAL/CAREGIVER LEAVE PROGRAMS

Program Type	Fast leave offered	Unpaid leave offered	No leave offered (statutory benefit only)
For birth parent (begins when disability ends)	51%	24%	19%
For non-birth parent (begins at birth)	51%	23%	20%
Leave to care for sick family member	53%	27%	22%
Adoption leave	53%	28%	19%
Foster leave	29%	35%	36%

2023 Employee Benefits Benchmark Report

2023 Benchmarking Data (100+ Employees)

The following data was compiled from employers with 100+ employees.



2023 Employee Benefits Benchmark Report

Health Plan Costs

Health care costs continue to rise each year, punctuating the importance of comparing your health care spend to that of other employers in your industry. The following data will provide valuable insight into average employee contributions, employer contribution strategies and more.

AVERAGE PERCENTAGE OF PREMIUM PAID, BY COVERED EMPLOYEES

Year	Single Coverage	Family Coverage
2019	18%	30%
2020	17%	27%
2021	17%	28%

AVERAGE PERCENTAGE OF PREMIUM PAID BY COVERED EMPLOYEES, BY EMPLOYER SIZE

Employer Size	Single Coverage	Family Coverage
All Small Employers	17%	27%
All Large Employers	18%	24%
All Employers	17%	28%



2023 Employee Benefits Benchmark Report

Health Plan Costs (cont.)

CONTRIBUTIONS – PPO V. HDHP, ALL EMPLOYERS

Plan Type	Average Monthly Dollar Amount	Average Contributions as a % of Premiums
PPO	\$96	19%
HDHP	\$446	29%
PPO	\$155	25%
HDHP	\$540	35%

AVERAGE ANNUAL EMPLOYEE AND EMPLOYER PREMIUM CONTRIBUTIONS, BY PLAN TYPE AND COVERAGE LEVEL

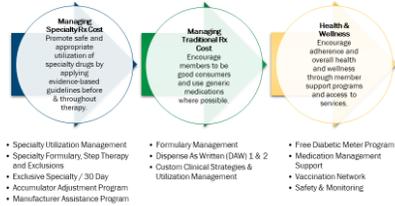
Plan Type	Coverage Level	Employee Contribution	Employer Contribution
HDHP	Single	\$5,714	\$1,242
HDHP	Family	\$15,674	\$5,178
PPO	Single	\$6,702	\$1,389
PPO	Family	\$10,884	\$6,408

COST CONTAINMENT STRATEGIES

Pharmacy Cost Containment Strategies

Current Pharmacy Programs & Solutions

This includes a sample of pharmacy strategies available under most PBM's to manage pharmacy costs.



Pharmacy & Pharmacy Point Solutions

This includes all concepts and categories related to the procurement of medications.

KEY	OPTIONS	CONSIDER FOR 2024 (Y/N)	Proposed Date to Review
	Pharmacy Care Out and Rx Point Solutions		
	Pharmacy Decision Support (Good Rx, Rx Savings Solutions)		
	Pharmacy Benefit Manager Coalitions		
	Patient Assistance Program Analysis		
	International Pharmacy Cost Procurement		
	Client Owned Pharmacy Procurement (GPO, 340b)		

Key Legend

In place	Currently not in place, previously recommended	Recommended for evaluation	Trending but not recommended at this time

Total Rewards Strategies

Communications

Quality communication ensures the transfer of information quickly and accurately to promote better understanding, contributing to the success of the employees and organization.

KEY	OPTIONS
	Audit existing internal communications
	Develop multi-channel resources to reach
	Personalize content on total rewards paid
	Ongoing communications campaigns with

Technology and HR

This includes concepts and categories related to the latest technology and HR

KEY	OPTIONS
	TCOFFers/Total Compensation Statements
	HRIS/Benefits Admin
	Leave Administration
	Mobile Apps
	Compensation Study

Engagement and Wellbeing

CBIZ Engagement & Wellbeing Consulting guides employers in creating truly high employee wellbeing & engagement.

KEY	OPTIONS
	Mental Health
	Total Rewards Incentives
	Family Forming Benefits
	Culture and Wellbeing Assessment/Wellbeing

Cost-Containment Strategies

Currently in place (Green checkmark), Recommended for Evaluation / Re-evaluation for 2023 (Yellow circle with dot)

	ALL PLANS	SELF-FUNDED ONLY
	<ul style="list-style-type: none"> Evaluate Narrow Network Savings Evolution of Network Efficiencies by Carrier and Region Association Plans 	<ul style="list-style-type: none"> Stop-Loss Strategies Captive Arrangements Reference-Based Pricing Medical and Rx Claims Audit Direct Contracting Behavioral Health Care-Outs Site of Care Care-Outs Maternity & Infertility Innovations Second Opinion Services Personalized (Genetic) Medicine Care Advocacy Programs Condition-Specific Programs (MSK, Mental Health)
	<ul style="list-style-type: none"> Centers of Excellence Telehealth and Virtual Care Prior Authorization Programs Utilization & Disease Management EAP Annual Physical Incentive Program Deductible Financing (Med/Dem, HRA) 	<ul style="list-style-type: none"> Rx Co-Insurer or Care-Out Specialty Drug Management and Direct Marketing Drug Coupon and Rebate Management Rx Tourism Rx Advocacy Programs (Sham) Specialty Copay Accumulators Limited Drug Distribution
	<ul style="list-style-type: none"> Defined Contribution Strategy Dependent Eligibility Audits Tobacco Surcharge Spousal Surcharge or Care-Out Wellbeing Incentives 	
	<ul style="list-style-type: none"> Formulary Structure Utilization Management (Step Therapy, Prior Authorizations) Consumer Tools (Rx Savings Solutions, GoodRx) Restricted/Preferred Networks Conierge Services Decision Support Tools (Imp, Jellyvision, etc) Active Enrollment Year-Round Communications Campaigns 	

SECTION 2

Healthcare Strategies & Trends

Emerging Trends

#1

Enhance the Employee Experience

- Redefine and Reorder
- Culture that reflects organizational core values
- Diversity, Equity, Inclusion & Accessibility
- Prioritize manager training and strategic communication

#2

Administration Efficiency

- HR and IT outsourcing
- Streamlined benefits technology

#3

Decrease Frequency Of Large Claims

- Site of care redirection or care-out
- Control of low-level care
- Second opinion providers
- Medical and Rx tourism
- Patient integrity

#4

Cost Containment

- Reference-based pricing
- Direct primary care and direct contracting
- High-deductible networks
- Capitated - Stop loss, medical, ancillary
- Case coordination

#5

Mental Health and Wellbeing Awareness

- Virtual health integrated with live care
- Tele-mental health services
- Expanded EAP services
- Psychological & workplace safety programs for remote or hybrid work

#6

Phase of Life Benefits

- Student loan repayment
- Employee care (aggressive changes)
- Family forming benefits
- Caregiver assistance programs



EMPLOYEE COMMUNICATION MATERIALS

Benefit Guide

COMPANY
LOGO

[YEAR]
[COMPANY NAME]
EMPLOYEE BENEFITS
GUIDE

[Tagline]

[COMPANY WEBSITE]

NOT SURE HOW TO GET STARTED?
DON'T WORRY!

Prior to open enrollment you will receive step-by-step enrollment instructions (by email from our HR team).

Until then, now is the perfect time to prepare by doing the following:

- Check that your personal information is accurate at [COMPANY WEBSITE]
- Review the benefits in which you are currently enrolled
- Take a look at the changes for 2023
- Get a sneak peek the plans being offered for the coming year
- Consider this booklet your open enrollment survival guide. Inside, you'll find everything you need to make informed benefits decisions, including in-depth information regarding your plan options, our policies and more.

At always, we wish you all a member of the [COMPANY NAME] family and look forward to a healthy and safe 2023.

REMEMBER:
Open enrollment is the one — and only — time of year when you can make any adjustments for the upcoming plan year.

Flyer With QR Code

[YEAR]
EMPLOYEE BENEFITS
ENROLLMENT

This is your opportunity to sign up for benefits that start in [YEAR]. You must enroll for coverage.

ENROLL TODAY AT
[WWW.WEBSITE.COM]
OPEN ENROLLMENT RUNS
[START DATE] – [END DATE]
Questions? Call us at [PHONE] from [TIME] - [TIME]

Scan me
OWN YOUR HEALTH

COMPANY
LOGO

Email Header

COMPANY
LOGO

COMPANY NAME
EMPLOYEE BENEFITS

Resource Center

LOGO
HERE

OPEN ENROLLMENT RESOURCE CENTER

MARK YOUR CALENDAR
Open enrollment will be Nov X – Nov XI

RESOURCES
Click here for more benefits information included in our intranet...

QUESTIONS?
Contact HR for more information.
Email: help@cbiz.com
Phone: XXX.XXX.XXX

This time of year can quickly get busy, but choosing the best benefits for you and your family is important. Open enrollment is a great time to reassess your needs, find ways to maximize your benefits usage, and save where you can.

If you want to find that perfect plan, or you have questions about how your insurance works, take a look at the resources below:

- 2023 Open Enrollment Eligibility
- Open Enrollment Breaker Sign-Up
- Financial Wellbeing Resources
- Employee Assistance Program

COMING SOON
Watch out for the 2023 benefits guide that will detail all changes, updated rates and additional products that will be offered this year.

Open Enrollment Presentation

Welcome!

[YEAR]
[COMPANY NAME]
BENEFITS OVERVIEW
PRESENTATION

Building a Year-Round Communications Strategy

An employers guide to empowering your workforce with effective communication that drives meaningful action.



BUILDING A YEAR-ROUND COMMUNICATIONS STRATEGY

PAGE 3

A Total Rewards Approach to Communications

Effectively communicating with your employees regarding everything your organization has to offer is essential, not only during open enrollment and the onboarding process but all year long. To maximize the impact of your communication strategy, we recommend taking a total rewards approach.

Think of total rewards as the "total package." Everything your organization offers as a perk to employees falls under this umbrella, including compensation, employee benefits, opportunities for growth and development, a sense of community and more. When it comes to properly promoting your total rewards, intentional communication helps boost the perceived value of working for your organization.

So, how can you ensure that your total rewards messaging is coming through loud and clear? The answer involves embracing innovation. Employers need to think outside the box when it comes to employee communications or risk seeing reduced utilization of benefits and, potentially, lower retention rates.

If you're ready to build a cutting-edge total rewards communications strategy that will maximize your employee investment, consider these three key steps – audit, develop and evaluate.



AUDIT

Audit your current communications process. What are you doing well? Where is there room for improvement? Identify the pain points that need to be addressed in both your existing materials and current channels.



DEVELOP

Develop a communications strategy that bridges the gaps in your current process by analyzing your organization's content creation and distribution processes.



EVALUATE

Evaluate the results of your communications strategy on a regular basis to ensure you're meeting the evolving needs of your employees and staying ahead of the curve.

ON-DEMAND WEBINAR

Why Investing in Employee Experience Will Pay Off in 2023

WATCH NOW





SAMPLE RENEWAL PRESENTATION

2024 RENEWAL PRESENTATION

ABC COMPANY
Date
CBIZ

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• Proposed Renewal and Open Enrollment Timeline	
Section 9: Appendix & Supporting Materials	

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SECTION 1

Summary of Current Programs & Renewal Dates

Medical Loss Ratio Summary

Month	EE Only	EE/SP	EE/CHH	EE/Children	Family	Medical Subsidies/Morale	Medical Member Morale	Premium	Medical Paid	Pharmacy Paid	Total Paid	Medical Value (Payers)	Paid PMPM	Discount	Loss Ratio	
201707	140	34	6	11	48	239	463	\$247,184	\$61,274	\$26,899	\$90,173	\$1,279	\$194.76		1176.649	36%
201708	141	36	6	14	48	245	475	\$253,128	\$154,947	\$27,186	\$182,063	\$1,724	\$363.27		\$298,091	72%
201709	140	35	6	14	47	242	467	\$250,282	\$218,840	\$27,346	\$246,186	\$1,235	\$527.16		\$997,134	96%
201710	146	35	6	13	48	248	473	\$248,738	\$185,076	\$20,669	\$175,765	\$1,610	\$371.60		\$327,509	71%
201711	152	34	6	13	51	256	492	\$261,860	\$187,042	\$27,423	\$214,465	\$1,220	\$435.90		\$297,796	82%
201712	154	35	6	13	51	259	498	\$265,415	\$188,467	\$45,644	\$204,111	\$1,028	\$409.86		\$361,281	77%
201801	150	38	6	14	60	278	562	\$234,067	\$128,347	\$33,637	\$161,983	\$1,075	\$288.23		\$310,193	69%
201802	160	40	7	15	63	285	580	\$241,173	\$131,325	\$25,904	\$157,218	\$1,165	\$271.17		\$395,481	65%
201803	164	39	8	15	65	291	592	\$245,093	\$125,989	\$37,833	\$163,822	\$1,244	\$276.90		\$354,255	61%
201804	163	38	8	16	64	289	589	\$244,171	\$190,644	\$29,440	\$200,084	\$1,225	\$373.66		\$386,702	90%
201805	168	38	9	17	65	295	600	\$245,515	\$116,658	\$35,355	\$154,013	\$1,214	\$256.69		\$341,891	62%
201806	165	39	10	17	65	296	604	\$249,656	\$169,519	\$36,476	\$207,995	\$905	\$344.36		\$376,476	63%
Summary	1,861	441	84	172	625	3,223	6,396	\$2,990,112	\$1,800,127	\$377,381	\$2,178,008	\$14,905	\$360.58		\$4,320,668	73%

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High-Cost Claimants

Top High Cost Claimants

Age	Gender	Resides	Primary Diagnosis	Enrolled	Risk	Medical	Pharmacy	Current Total	Previous Total
79	Male	Self	Malignant neoplasm of base of tongue	10	4	\$305,488	\$8,009	\$344,287	\$206,074
63	Male	Self	Encounter for antineoplastic chemotherapy...	6.5	1	\$202,145	\$63	\$202,207	\$198,412
62	Male	Self	Encounter for antineoplastic chemotherapy...	9.8	1	\$302,711	\$63,489	\$366,200	\$177,815
73	Male	Child	Hemorrhoids without complications	9.2	1	\$160,973	\$4,268	\$165,241	\$46,808
38	Male	Self	Type 2 diabetes mellitus with other complications	6.1	1	\$153,289	\$5,110	\$158,399	\$6,407
33	Male	Self	Type 2 diabetes mellitus with other complications	5.1	1	\$146,374	\$0	\$146,374	\$4,371
68	Male	Self	Malignant neoplasm of test of parotid gland	6.7	1	\$114,472	\$17,800	\$132,272	\$168,802
62	Male	Self	Chronic lymphocytic leukemia	9.8	1	\$59	\$127,095	\$127,095	\$169,854
98	Male	Self	Pyelonephritis without tubal	5.1	1	\$121,482	\$80	\$121,562	\$0

HCC by Relationship

Self: \$2M (48% of 13 Members)

Spouse: \$232K (98% of 2 Members)

Child: \$393K (54% of 3 Members)

HCC by Relationship

Self: \$2M (48% of 13 Members)

Spouse: \$232K (98% of 2 Members)

Child: \$393K (54% of 3 Members)

High Cost Claimants

18 Members (25% of 72)

\$2.8M (11% of \$23.8M)

\$987K SL Reimb. (11% of \$9.0M)

Potential High Cost Claimants

\$50-\$9K: 1 Member

\$80-\$9K: 1 Member

\$70-\$9K: 1 Member

\$60-\$9K: 1 Member

\$50-\$9K: 1 Member

34 Members (47% of 72)

\$2.3M (10% of \$23.8M)

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SERVICE TIMELINE

Annual Timeline				
ABC COMPANY SERVICE TIMELINE 2023				
	ACTIVITIES / DELIVERABLES	RESPONSIBLE		
<h2>Q1</h2> <p>January February March</p>	<ul style="list-style-type: none"> Post Renewal / Carrier Transition Tasks Deliver Year-End Claims Analysis Carrier Document Delivery Document review Monthly: <ul style="list-style-type: none"> Monthly Financial Overview OR Claims Dashboard Regulatory Updates "Benefit Beat" and Healthcare Reform Bulletins Wellbeing Insights Newsletters 	CBIZ/Client/Carriers CBIZ Carrier(s) CBIZ CBIZ		
	<h2>Q2</h2> <p>April May June</p>	<ul style="list-style-type: none"> Annual Performance Review 5500 Preparation Compliance Checklist Review Monthly: <ul style="list-style-type: none"> Monthly Financial Overview OR Claims Dashboard Regulatory Updates "Benefit Beat" and Healthcare Reform Bulletins Wellbeing Insights Newsletters 	CBIZ/Client CBIZ CBIZ/Client CBIZ	
		<h2>Q3</h2> <p>July August September</p>	<ul style="list-style-type: none"> Renewal Planning (projections, funding options, communications, technology) Develop RFP (if applicable) 5500 Filings due Issue RFP (if applicable) Carrier Renewal Delivery Renewal Presentation / RFP Results Monthly: <ul style="list-style-type: none"> Monthly Financial Overview OR Claims Dashboard Regulatory Updates "Benefit Beat" and Healthcare Reform Bulletins Wellbeing Insights Newsletters 	CBIZ/Client CBIZ CBIZ CBIZ/Carriers Carrier CBIZ/Client CBIZ
			<h2>Q4</h2> <p>October November December</p>	<ul style="list-style-type: none"> Renewal Decisions (Additional Option Evaluation) Contribution Strategies and Calculations Open Enrollment/Communication Strategy Implementation (drafts, etc.) Implementation and Renewal Document Review Open Enrollment Enrollment elections finalized with carriers Monthly: <ul style="list-style-type: none"> Monthly Financial Overview OR Claims Dashboard Regulatory Updates "Benefit Beat" and Healthcare Reform Bulletins Wellbeing Insights Newsletters
<p>As needed /ongoing</p>				<ul style="list-style-type: none"> Client Service Support Issue Resolution Support Carrier/Vendor Management Compliance Calls





ANNUAL PERFORMANCE REVIEW

2023 ANNUAL PERFORMANCE REVIEW

Our Annual Performance Review reviews current plan performance, cost, and employee experience and includes a 3-year strategic plan for recommended strategies.

Pharmacy Utilization Review

	Your Claims	Universal PBM Benchmark	Passthrough PBM Benchmark
AWP Starting Price	\$5,708,285	\$5,708,285	\$5,708,285
Network Discounts	(\$2,763,248)	(\$3,037,858)	(\$3,044,288)
Impact of Drug Reclassification	\$27,454	\$0	\$0
Dispensing Fees	\$8,781	\$35,522	\$27,839
Member Contributions	(\$283,425)	(\$283,425)	(\$283,425)
Rebates	(\$859,151)	(\$859,151)	(\$873,174)
Administrative Fees	\$0	\$0	\$39,280
Year Cost	\$1,950,058	\$1,808,433	\$1,894,289
\$ Difference	N/A	(\$141,625)	(\$55,789)
% Difference	N/A	-7.3%	-2.8%

Standard model showing your claim costs vs benchmarks.

Impact of Wasteful Spending Drugs

Rate / 1,000 Rx	Your Claims	Universal PBM Benchmark	P
Non-Rebatable Wasteful Brand	5	3	
Rebatable Wasteful Brand	7	3	
Wasteful Generic	5	1	

Rate of wasteful prescriptions per 1,000 rx

Wasteful drugs can be 97% more expensive than an equivalent, lower costing alternative on spending in your claims with non-wasteful alternatives.

Drug (Dispensed)	Drug Alternative	# Rx
QUELIS TAB 500-25.5	IBUPROFEN TAB 800MG	13
FENOFIBRATE TAB 120MG	FENOFIBRATE TAB 54MG	4
IBUPROFEN CAP 200MG	IBUPROFEN TAB 800MG	4
SRALISE TAB 800MG	SABAPENTIN CAP 300MG	5
HYDROCODONE LOT 0.1%	TRAMACHOLOL OIN 0.1%	6
OMEPRazole CAP 40-1100	OMEPRazole CAP 20MG	4
BAVADEE CAP 30MG	CALCITRIOL CAP 0.25MG	5
TOPAMAX TAB 100MG	TOPIRAMATE TAB 25MG	5
TROKENDI XR CAP 200MG	TOPIRAMATE TAB 25MG	3
ULORIC TAB 40MG	ALLOPURINOL TAB 300MG	7

Wasteful Drug	Your Claims
Days PMPM	0.89
AWP / Day	\$22.06
Average AWP PMPM	\$20.04
Difference AWP PMPM vs Client	N/A
Difference AWP Annualized vs Client	N/A

Comparison of your wasteful spending vs. benchmark.

SECTION 1

Plan Review

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 - d) Financial Dashboard
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 - f) Wellbeing Dashboard
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 - b) Additional Benefits
 - c) Culture & Environment
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 - e) Total Rewards Strategies
- IV. **Communication Considerations**
 - a) Communication and Education Checklist
 - b) FlippingBook Utilization
 - c) Video Analytics
 - d) Communications and Wellbeing Budget
- V. **Compliance Review**
 - a) Compliance Reminders for Self-Funded Groups
 - b) Recent Compliance Updates & Reminders
 - c) Compliance Resources and Links
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 - b) Captives
 - c) Funding Spectrum
 - d) Designing Your Plan
 - e) Cost Saving Strategies
 - f) Communications Toolkit



REPORTING SAMPLES

Migration (%) N/A* 2.0% 4.0% 6.0% 8.0% 10.0% 12.0% 14.0% 16.0% 18.0% 20.0%
 * The baseline non-migration scenario has no contribution changes and uses the higher 9.46% Kaiser renewal.

Subscribers Not Eligible to Migrate to Kaiser

Subscribers	N/A	10,936	10,936	10,936	10,936	10,936	10,936	10,936	10,936	10,936	10,936	10,936
Total Funding	N/A	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894	\$155,973,894
Employer Contrib	N/A	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262	\$112,343,262
Employee Contrib	N/A	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632	\$43,630,632

Subscribers Choosing To Not Migrate To Kaiser

Subscribers	N/A	4,475	4,383	4,292	4,201	4,109	4,018	3,927	3,835	3,744	3,653
Total Funding	N/A	\$68,189,514	\$66,440,888	\$65,468,873	\$64,496,859	\$63,514,162	\$62,542,148	\$61,570,133	\$60,587,437	\$59,615,422	\$58,643,407
Employer Contrib	N/A	\$50,391,550	\$49,139,735	\$48,439,615	\$47,739,496	\$47,031,682	\$46,331,562	\$45,631,442	\$44,923,629	\$44,223,509	\$43,523,389
Employee Contrib	N/A	\$17,797,964	\$17,301,153	\$17,029,258	\$16,757,363	\$16,482,480	\$16,210,586	\$15,938,691	\$15,663,808	\$15,391,913	\$15,120,018

Subscribers Choosing To Migrate To Kaiser

Subscribers	N/A	91	183	274	365	457	548	639	731	822	913
Total Funding	N/A	\$760,304	\$2,094,426	\$2,854,730	\$3,615,033	\$4,383,692	\$5,143,996	\$5,904,300	\$6,672,959	\$7,433,263	\$8,193,567
Employer Contrib	N/A	\$479,669	\$1,302,988	\$1,776,399	\$2,249,810	\$2,728,424	\$3,201,835	\$3,675,246	\$4,148,750	\$4,622,271	\$5,096,329
Employee Contrib	N/A	\$280,635	\$791,438	\$1,078,330	\$1,365,223	\$1,655,269	\$1,942,161	\$2,229,054	\$2,519,099	\$2,805,992	\$3,095,238

Total Subscribers

Subscribers	15,502	15,502	15,502	15,502	15,502	15,502	15,502	15,502	15,502	15,502	15,502
Total Funding	\$225,620,128	\$224,923,712	\$224,509,208	\$224,297,497	\$224,085,786	\$223,871,749	\$223,660,038	\$223,448,327	\$223,234,290	\$223,022,579	\$222,810,868
Employer Contrib	\$162,545,125	\$163,214,480	\$162,785,985	\$162,559,276	\$162,332,568	\$162,103,368	\$161,876,659	\$161,649,950	\$161,420,750	\$161,194,042	\$160,964,980
Employee Contrib	\$63,075,003	\$61,709,232	\$61,723,223	\$61,738,221	\$61,753,219	\$61,768,381	\$61,783,379	\$61,798,377	\$61,813,540	\$61,828,537	\$61,845,888

Savings Compared To Baseline Non-Migration Scenario

Total Savings (\$)	N/A	\$696,416	\$1,110,919	\$1,322,630	\$1,534,341	\$1,748,378	\$1,960,089	\$2,171,800	\$2,385,837	\$2,597,548	\$2,809,259
Employer Savings (\$)	N/A	-\$669,355	-\$240,860	-\$14,152	\$212,557	\$441,757	\$668,465	\$895,174	\$1,124,374	\$1,351,083	\$1,580,145
Employee Savings (\$)	N/A	\$1,365,771	\$1,351,780	\$1,336,782	\$1,321,784	\$1,306,622	\$1,291,624	\$1,276,626	\$1,261,463	\$1,246,466	\$1,229,115

Mem. ID	Total Med+Rx Plan Paid	Top 3 Diag/Drug Plan Paid	% of Top 3 To Total	1st Top Diagnosis Or Drug Category	1st Top Diagnosis Or Drug Description	1st Top Diagnosis Or Drug Plan Paid	2nd Top Diagnosis Or Drug Category	2nd Top Diagnosis Or Drug Description	2nd Top Diagnosis Or Drug Plan Paid	3rd Top Diagnosis Or Drug Category	3rd Top Diagnosis Or Drug Description	3rd Top Diagnosis Or Drug Plan Paid
1	\$ 434,739	\$ 288,950	68%	Newborn Care	Twin liveborn infant, delivered vaginally	\$ 103,498	Pneumonia	Pneumonitis due to inhalation of food and vomit	\$ 96,525	Respiratory Failure	Acute respiratory failure with hypoxia	\$ 88,927
2	\$ 358,776	\$ 327,526	92%	Cancer Therapies	Encounter for antineoplastic immunotherapy	\$ 222,720	Breast Cancer	Malignant neoplasm of unsp site of right female breast	\$ 77,859	Limb Fractures	Nondisplaced transverse fracture of right patella, int	\$ 27,148
3	\$ 308,934	\$ 196,027	64%	Breast Cancer	Malignant neoplasm of unsp site of unspecified female breast	\$ 82,832	Cancer Therapies	Encounter for antineoplastic immunotherapy	\$ 61,162	Cancer Therapies	Encounter for antineoplastic chemotherapy Z51.11	\$ 54,233
4	\$ 139,161	\$ 122,819	88%	Pharmacy	AUBAGIO	\$ 71,059	Pharmacy	AMPYRA	\$ 36,304	Pharmacy	TEPIDERA	\$ 15,456
5	\$ 134,926	\$ 126,703	94%	Complicated Misc Symptoms	Septis, unspecified organism	\$ 113,722	Burns	Burn of second degree of chest wall, initial encounter	\$ 9,186	Pharmacy	ONFI	\$ 3,813
6	\$ 127,987	\$ 125,111	98%	Complicated Misc Symptoms	Septis, unspecified organism	\$ 119,878	Pharmacy	VYVANSE	\$ 3,067	Lower Respiratory Disorders	Pleural effusion, not elsewhere classified	\$ 2,367
7	\$ 119,851	\$ 81,825	68%	Breast Cancer	Malignant neoplasm of unsp site of right female breast	\$ 52,293	Breast Cancer	Intraductal carcinoma in situ of left breast	\$ 15,598	Cancer Therapies	Encounter for antineoplastic radiation therapy	\$ 13,934
8	\$ 117,012	\$ 110,004	94%	Septicemia	Streptococcal sepsis, unspecified	\$ 90,704	Stroke and TIA	Cereb infrc due to embolism of right middle cerebral artery	\$ 17,008	Stroke and TIA	Other cerebral infarction- I63.89	\$ 2,291
9	\$ 111,954	\$ 95,848	85%	Breast Cancer	Malignant neoplasm of ovip sites of left female breast	\$ 53,280	Breast Cancer	Malignant neoplasm of unspecified site of left female breast	\$ 35,899	Breast Disorders	Deformity of reconstructed breast	\$ 6,890
10	\$ 104,170	\$ 98,982	95%	Pharmacy	COSENTYX PEN (2 PENs)	\$ 84,524	Pharmacy	TRESIBA FLEXTOUCH U-100	\$ 9,538	Pharmacy	JARDIANCE	\$ 4,920
11	\$ 91,648	\$ 89,821	98%	Complicated Fx of Neck and Trunk	Unstable burst fracture of T7-T8 vertebra, int for disc fx	\$ 79,819	Fracture of Neck and Trunk	Unsp fracture of T7-T8 vertebra, int for disc fx	\$ 9,549	Fracture of Neck and Trunk	Unsp fracture of unsp thoracic vertebra, int for disc fx	\$ 853
12	\$ 88,804	\$ 50,439	57%	Hernias	Umbilical hernia without obstruction or gangrene- K42.9	\$ 25,481	Misc Aftercare	Encounter for aftercare following heart transplant	\$ 15,218	Pharmacy	TRILIKITY	\$ 9,740
13	\$ 87,563	\$ 69,895	80%	Lower GI Disorders	Divrt of g/int w/o perforation or abscess w/o bleeding	\$ 39,754	Lower GI Disorders	Melena	\$ 23,272	Lower GI Disorders	Hemorrhage of anus and rectum	\$ 6,868
14	\$ 77,806	\$ 78,990	99%	Pharmacy	COSENTYX PEN	\$ 61,100	Pharmacy	ENBREL MINI	\$ 15,361	Pharmacy	LEFLUNOMIDE	\$ 509
15	\$ 75,344	\$ 53,183	71%	CAD	Atrial heart disease of native cor art w unstable ang pctrs	\$ 41,170	Abnormal Lab and Radiology	Abnormal findings on dx imaging of heart and cor circ	\$ 6,080	Pharmacy	ELIQUIS	\$ 5,953

CBIZ DATA ANALYTICS SOLUTION



High-Cost Claimants Overview



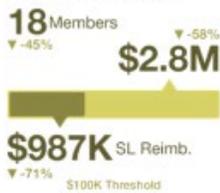
Top High Cost Claimants

Age	Gender	Relation	Primary Diagnosis	Enrolled	Risk	Medical	Pharmacy	Current Total	Previous Total
79	Male	Self	Malignant neoplasm of base of tongue	●	10 ▲	\$35,488	\$9,009	\$364,497	\$226,074
53	Male	Self	Encounter for antineoplastic chemother...	●	9.5 ▼	\$292,145	\$63	\$292,207	\$160,412
60	Male	Self	Encounter for antineoplastic immunothe...	●	9.8 ▲	\$200			
23	Male	Child	Horseshoe abscess	●	9.2 ▲	\$160			
38	Male	Self	Type 2 diabetes mellitus with other sp...	●	9.5 ▼	\$150			
53	Male	Self	Type 2 diabetes mellitus with other sp...	●	5 ▲	\$140			
59	Male	Self	Malignant neoplasm of tail of pancreas	●	9.7 ▲	\$114			
63	Male	Self	Chronic lymphocytic leuk of B-cell typ...	●	9.9 ▲				
59	Male	Self	Pyothorax without fistula	●	5 ▲	\$121			

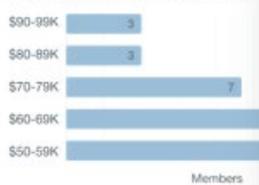
Utilization Reporting



High Cost Claimants



Potential High Cost Claimants



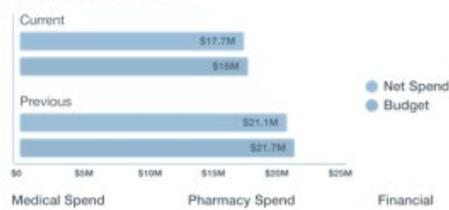
HCC by Relationship



High Cost Claimants



Total Spend vs. Budget



Cost Per Month



Enrollment



High Cost Claimants



Risk Score



Potential Savings Opportunities



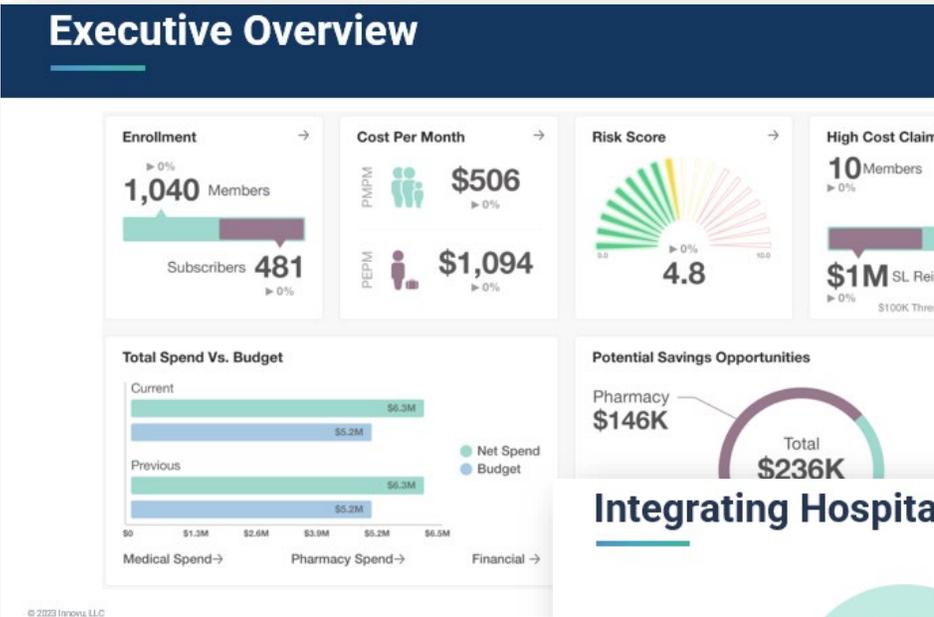
High Cost Claimants



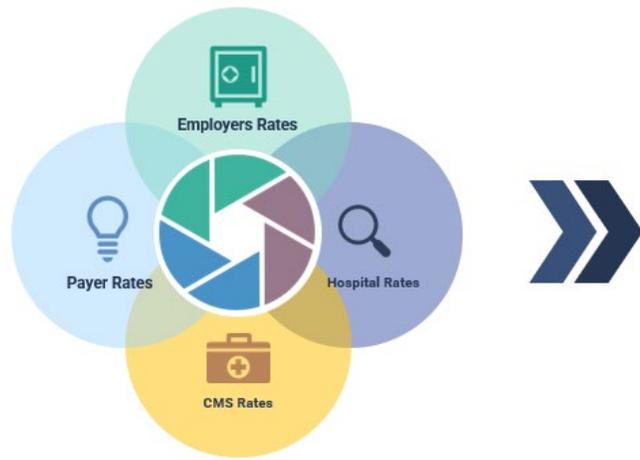
CBIZ DATA ANALYTICS SOLUTION



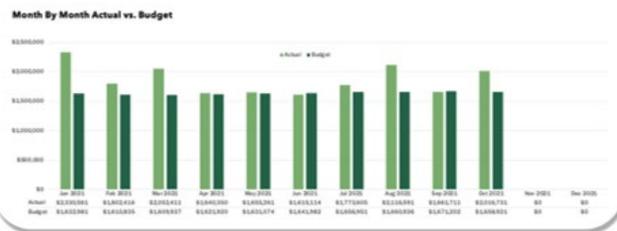
Executive Overview



Integrating Hospital & Payer Data

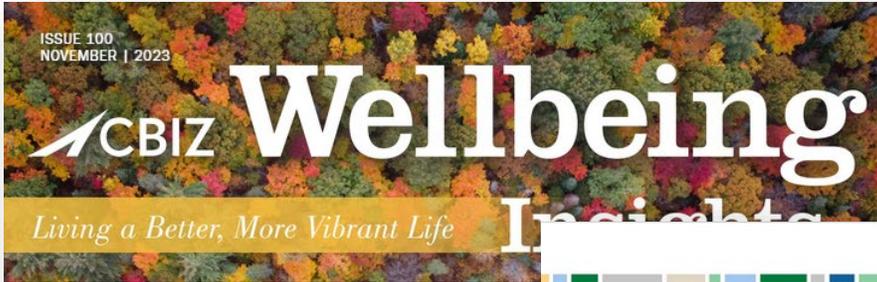


Monthly Experience Report





SAMPLE WELLBEING RESOURCES



Embracing the Caregiving Role for Your Aging Parent

Millions of Americans will become caregivers to a sick or aging parent at some point in their lives. Many times we're thrust into this role without preparation, not realizing our parents would need assistance so soon. While it can be a rewarding journey, the caregiver role is extremely challenging and requires patience, empathy and practical knowledge to navigate the best care possible for your loved one. In this article, we'll explore essential aspects of caring for an aging parent, offering guidance and tips to make this transition smoother for you and your loved one.

Start the conversation early. In a best-case scenario, our parents are taking steps in their younger years to be as strong and financially secure as possible, leading to a retirement filled with joy, health and many health conditions that are unavoidable, the make to set ourselves up for greater success in help your parents set fitness, nutrition and health strength and wellbeing into their later years. If th or concerns your parents have been putting off a to take an active role in working with their physic those issues before they worsen.

Financial Focus

Creative Budgeting for a Joyful Holiday Season

The holiday season is a time of festivities, gift-giving and making memories with loved ones. However, it's also a time when overspending can easily lead to financial stress when the holidays are over. Here are some ideas that can help you enjoy the holidays while keeping your finances in check:

Set a Holiday-Specific Budget

The first step in holiday budgeting is setting a realistic spending limit. Take a close look at your financial situation, factoring in your income, regular expenses and any other financial commitments. Once you have a clear picture, determine the amount you can comfortably allocate to holiday expenses without jeopardizing your financial wellbeing. This number will serve as your guiding light throughout the season.

shouldering the entire expense, make your events potluck-style. Invite guests to bring their favorite dishes or drinks, spreading the cost among everyone. This not only eases the financial burden but also creates a sense of sharing.

Shop Smart with Discounts & Cashback

Take advantage of holiday sales, discounts and cashback offers when shopping for gifts and supplies. Check out Black Friday and Cyber Monday deals, as well as other holiday promotions offered by retailers. Additionally, consider using cashback apps and rewards programs to earn money back on your purchases. These savings can add up quickly.

Gift Creatively

You can show your love and appreciation without breaking

The Perks & Pitfalls of Caffeine

Ever wonder if your morning cup of joe is helping or harming your health in the long run? Sure, caffeine is widely effective

drinks filled with sugar and other artificial flavors and additives. That said, many studies have concluded that



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

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.

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.