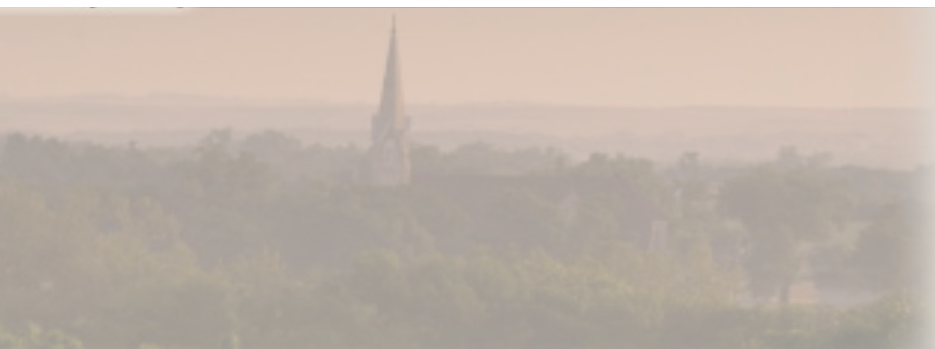
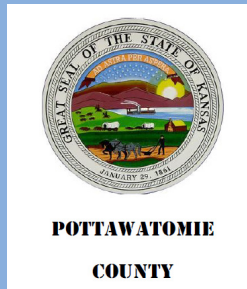


# POTTAWATOMIE COUNTY, KANSAS

## BENEFIT BROKER/CONSULTANT INTERVIEW

FEBRUARY 9, 2017



*Presented by:*

**CBIZ EMPLOYEE SERVICES ORGANIZATION**  
A Division of CBIZ Benefits & Insurance Services, Inc.

Gavin Steketee, Team Lead and Benefits Consultant  
Jeff Fosnough, Director of Business Development  
Janet Willis, Senior Account Executive  
Jeff Stoppel, Consultant - Benefits Direct



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# ABOUT CBIZ



## YOUR CBIZ TEAM

### Your Local Account Team

#### Team Lead, Benefit Consultant

Gavin Steketee

#### Director of Business Development

Jeffrey Fosnough

#### Senior Account Executive

Janet Willis

#### Account Executive

Maggie Releford

#### Client Service Representative

Katarina Pretz

#### Senior Actuarial Analyst

Dave Coleman

#### Wellbeing Account Executive

Lacey McCourt, MSW

#### Client Claims Specialist

Judy Wood

#### Medicare Specialist

Andy Burnham



### KEY OBJECTIVES

#### Phase 1:

1. Evaluate alternatives to State Employee Health Plan (SEHP)
  - Networks
  - Funding options
  - Cost comparison
  - Plan design
2. Analyze feasibility of carving out pharmacy benefit

#### Phase 2:

1. Document a strategic plan with acknowledgment of culture, budget, organizational health, risks and opportunities to provide a road map to success;
2. Utilize CBIZ actuarial resources for plan modeling and forecasting;
3. Provide quarterly and annual review of financial and claims experience;
4. Assistance, interpretation and recommendations for compliance, regulatory and reporting requirements pertaining to COBRA, HIPAA, DOL, Health Care Reform;
5. Evaluate the Wellness/Wellbeing program;
6. Focus on Customized Employee Communication and Education;
7. Ongoing analysis of utilization of plan with recommendations.

### Your Industry Experts

#### Vice President Regulatory Affairs

Karen McLeese, JD

#### Actuarial Practice Lead

Dave Rubadue, FSA, MAAA, CLU

#### Pharmacy Practice Lead

Mike Zucarelli, PharmD

#### Director of Clinical Consulting Services

Erin Eason, O.T.

#### Senior Account Manager, Clinical Consulting Services

Caitlin Kerr, MBA

### National Resources

Pharmacy Consulting  
Wellbeing Solutions  
Regulatory Affairs  
Communications / Technology  
ACA Filings

### Local Subcontractor

Jeff Stoppel  
*Benefits Direct*

# ABOUT CBIZ



POTTAWATOMIE COUNTY + CBIZ = SUCCESSFUL PARTNERSHIP

## Offices in most major markets



### Benefits & Insurance

- Employee Benefits Consulting
- Human Capital Management/ Payroll
- Property & Casualty
- Retirement Plan Services
- Human Capital Services
- Executive Search
- Compensation Consulting
- Life Insurance



### Financial & Accounting

- Accounting & Tax
- Government Health Care Consulting
- Financial Advisory
- Valuation
- Litigation Support
- Risk & Advisory Services
- Real Estate Advisory Services



**#1**  
AMERICA'S BEST  
Consulting &  
Accounting Employer



Commitment  
to Community  
INCLUDING  
3 MILLION+  
LBS. OF FOOD  
Donated  
since 2009

BEST AND  
BRIGHTEST  
COMPANIES  
TO WORK FOR  
IN THE NATION  
WINNER 2016

## National Presence

- #1** America's Best Employer in Consulting and Accounting as ranked by Forbes Magazine in 2015
- #1** Largest U.S. Benefits Specialist
- #10** Largest Accounting Provider Nationally
- 18<sup>th</sup>** Largest Broker of U.S. Business
- A Top 100** Retirement Plan Adviser

## Regional Presence

- 15** Year average tenured Engagement team
- Specialized expertise with public entity clients
- KC** National Employee Benefits Division headquarters
- 13** Year average client retention
- 50+** Years experience in Employee Benefits

## Engagement Fundamentals

- We will **care** about your success in building excellence and legacy in the community
- We will treat you like **the most important client**
- We will take the time to know your **people** and **business practices** to provide advice that is unique to your individual needs
- We will **challenge** you to consider new ideas, while providing appropriate guidance based on a thorough evaluation
- We will manage to a **collaboratively defined** goal and plan and work together to create a strategic plan

# ABOUT CBIZ



## CBIZ PUBLIC ENTITY EXPERIENCE

OVER  
**700**  
PUBLIC ENTITY CLIENTS NATIONALLY

**50** YEARS EXPERIENCE IN THE  
PUBLIC SECTOR

### Kansas & Missouri Metro Area Clients

#### Cities

- City of Belton
- City of Cape Girardeau
- City of Merriam
- City of Prairie Village
- City of Sugar Creek
- City of Butler
- City of Liberty
- City of St. Joseph
- City of Waukesha

#### Counties

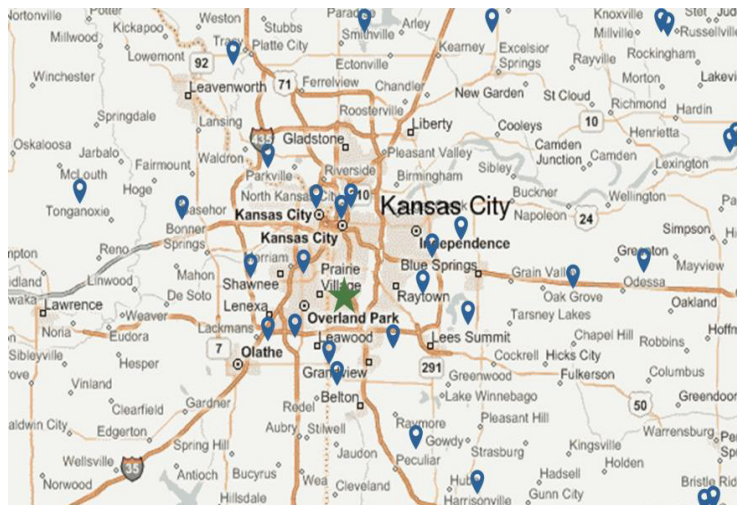
- Anderson County
- Daviess County
- DeKalb County
- Saline County
- Platte County

#### Universities

- Ottawa University

#### School District Clients

- Atchison USD #409 School District
- Blue Springs School District
- Center School District
- Clinton County R-III School District
- East Buchanan School District
- Grandview Consolidated School District
- Kansas City, Kansas School District
- Louisburg School District
- Mid-Buchanan R-V School District
- Odessa R-VII School District
- Park Hill K-12 School District
- Raymore-Peculiar Schools
- Shawnee Mission School District
- Turner USD #202 School District
- Tonganoxie School District
- Belton School District #124
- Blue Valley School District
- Bonner Springs School District
- De Soto School District
- Fort Osage R-I School District
- Harrisonville School District
- Independence School District
- Kansas City, Missouri Public Schools
- Lathrop R-II School District
- Lee's Summit R-7 School District
- Oak Grove R-VI School District
- Olathe School District
- Piper School District
- Raytown School District

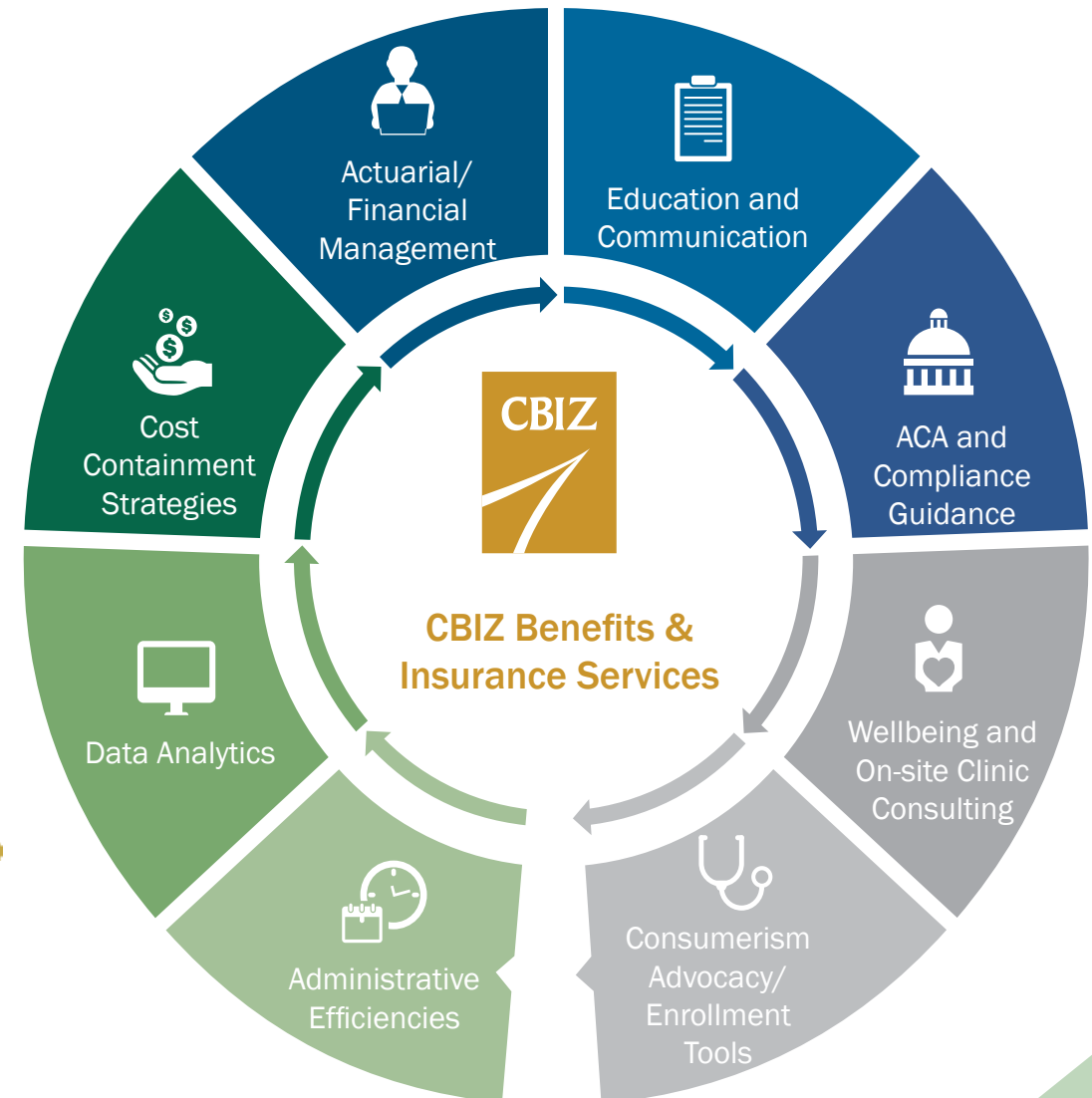


# EXECUTIVE SUMMARY



## SCOPE OF SERVICES

The CBIZ process begins when a senior consultant establishes a relationship with each new client and stays with them throughout the entire process. That specialist works with the entire CBIZ team, accessing resources, knowledge, and expertise to ensure every client gets the most of what CBIZ has to offer. It starts with a comprehensive analysis of our client's business to understand their goals and help us customize a plan to each business case. We benchmark our client's current position, take an assessment and then work to build a strategic plan with key markers that **deliver** on our client's vision.



Review risks and opportunities



Develop strategy



Integrate resources



Execute plan



Measure outcomes

### MEANINGFUL INTEGRATION

# EXECUTIVE SUMMARY

## PHASE 1



## UNDERSTANDING YOUR OBJECTIVES

### MARKETING EVALUATION

**1**

**CONDUCT INITIAL IN-DEPTH REVIEW OF SEHP SPECIFIC TO THE COUNTY**

**2**

**BENCHMARK EXISTING PLANS TO MARKET**

**3**

**CONDUCT A REQUEST FOR PROPOSAL**

**4**

**DETERMINE FEASIBILITY OF SELF-FUNDED VS. FULLY INSURED**

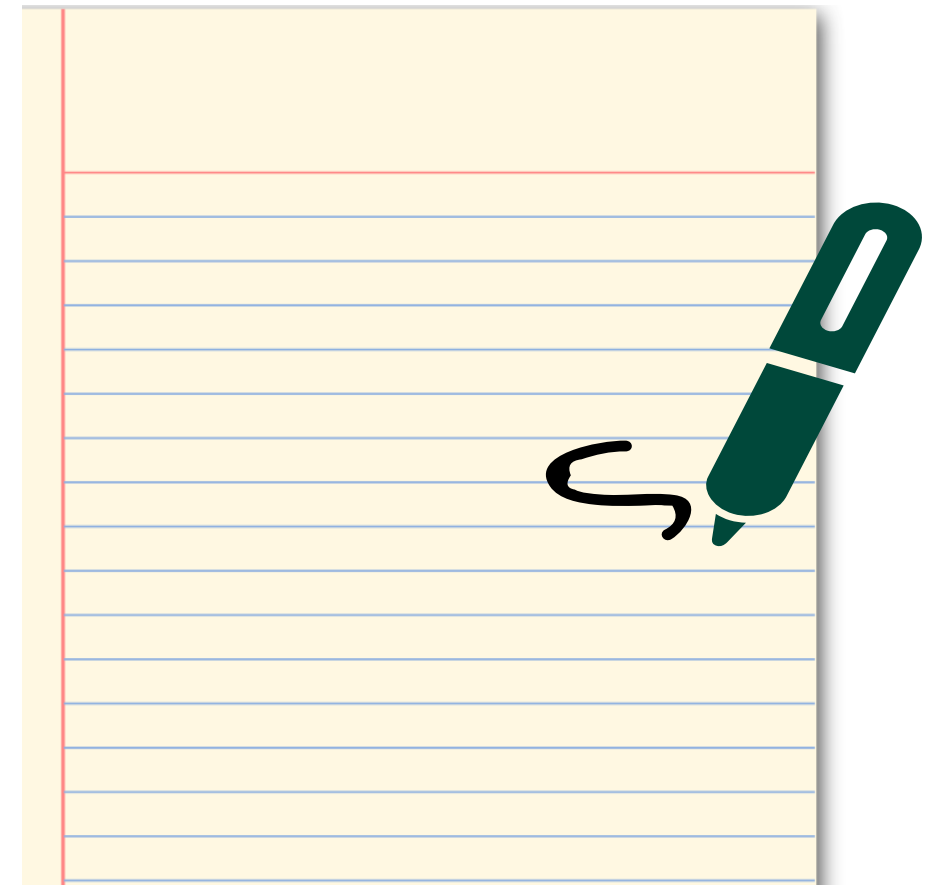
**5**

**CONDUCT ANALYSIS OF ALL MARKET OPTIONS INCLUDING:**

- A. Plan design
- B. Network
- C. Funding options
- D. Cost and contribution strategies
- E. Pharmacy carve-out options

**6**

**MAKE RECOMMENDATION TO COUNTY**



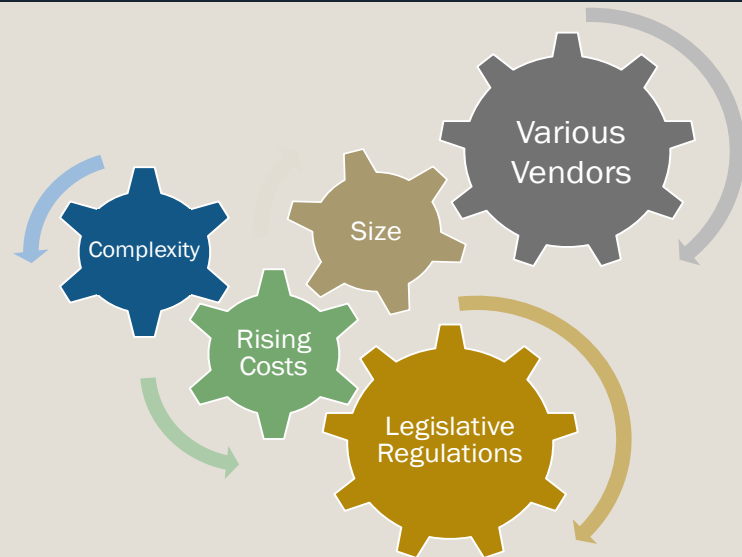
# STRATEGIC PROCESS

## PHASE 1

## MARKET EXPLORATION AND REVIEW



### REVIEW ALL FACTORS



### CONSIDER ALL ALTERNATIVES

- Traditional Insurance Markets
- Hybrid Risk Products
- Self-Funded with appropriate risk allocation
- Multiple Employer Welfare Arrangements
- Captive Risk Arrangements



### CBIZ APPROACH

- 1. Explore** objectives and unique positions
- 2. Review** possible environments and risks
- 3. Create** best outcomes for key stakeholders

**50** Years of Experience

**#1** Goal: ALWAYS do what's best for client



***Our cultural drive is to ensure your long term success***



# STRATEGIC PROCESS

## PHASE 1



# VENDOR SELECTION



### PLAN DESIGN

- Review organizational goals and total rewards strategy
- Perform cost, trend and benchmark analysis
- Project impact of potential design changes
- Identify best fit, value-based plan design options

### RENEWALS

- Forecast benefits and premiums
- Identify vendor alternatives
- Evaluate all renewals
- Negotiate renewal term

### MARKETING

- Develop specific, customized bid specifications
- Provide analysis, comparison and recommendations
- Facilitate finalist meetings
- Present recommendations to management

### IMPLEMENTATION

- Schedule vendor planning meetings
- Coordinate eligibility data
- Review administrative forms, billing, contracts, etc.
- Establish service standards, performance guarantees, etc.

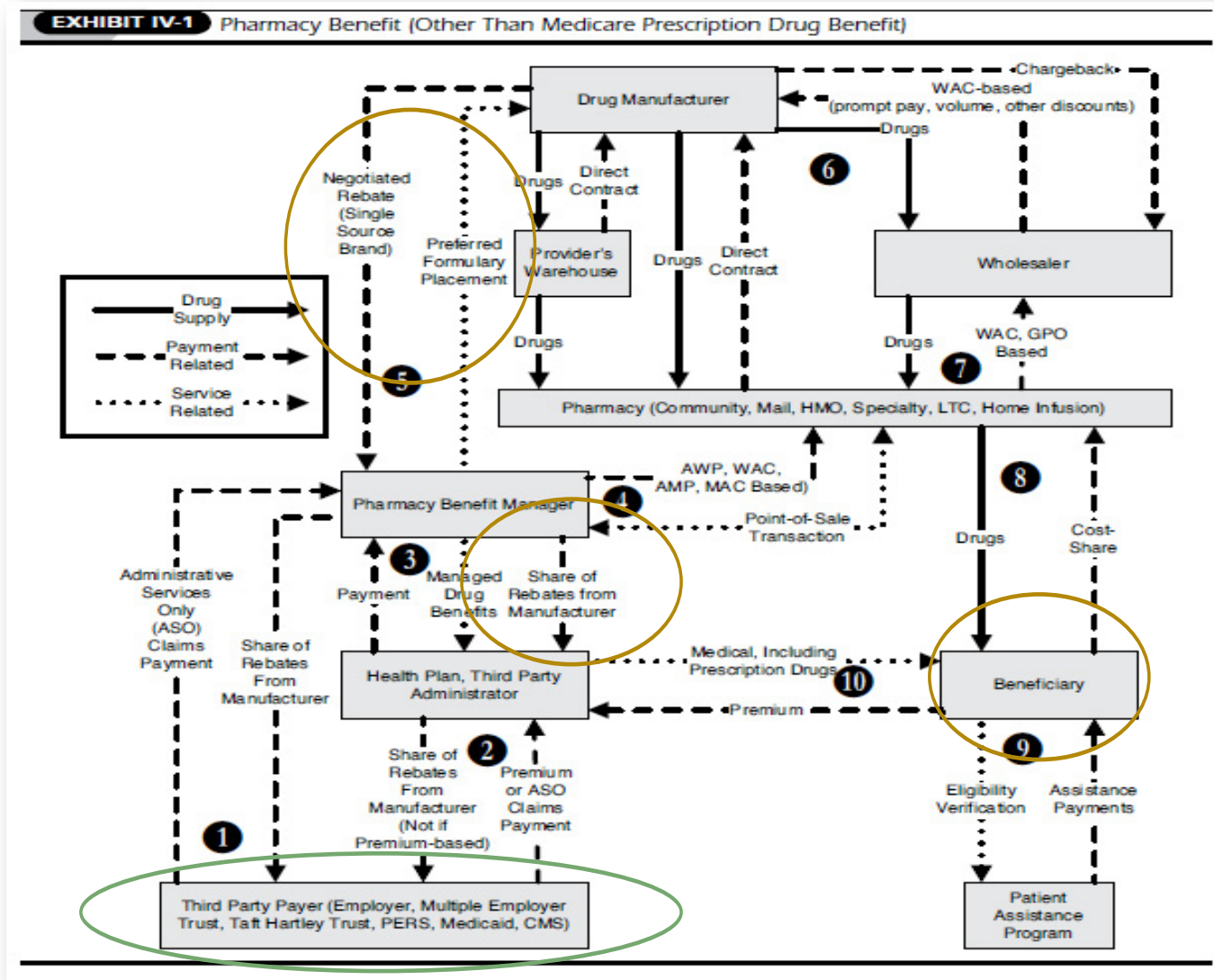
## Sample Vendor Evaluation

ABC Company Medical Plan Summaries Effective January 1, 2017	BCBS of Kansas City Blue Care HMO	BCBS of Kansas City Preferred Care Blue PPO	BCBS of Kansas City BlueStar HSA/HMO-P	UMC Optima	UMC Option 1	UMC Option 2	UMC Option 3	UMC Option 4
<b>Plan Type &amp; Network</b>	Blue Care HMO	Preferred Care Blue PPO	BlueStar HSA/HMO-P	Optima	Option 1	Option 2	Option 3	Option 4
<b>Annual Deductible (calendar year)**</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Annual Out-of-Pocket (calendar year)**</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Maximum Out-of-Pocket (calendar year)**</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Waiting Period</b>	0%	0%	0%	0%	0%	0%	0%	0%
<b>Eligibility Requirements</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Physician Services</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Hospital Care</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Prescription Drugs</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Maternity Care</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Behavioral Health</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Telemedicine</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Other Services</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Network</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Additional Information</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Summary</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Percentage of Increase/Decrease by Year</b>	BCBS PPO	BCBS HMO	BCBS HSA/HMO-P	UMC LFO GP	UMC HSA OAP	UMC LFO GP	UMC HSA OAP	UMC LFO GP
<b>Enrollment - Total</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Single</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Family</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Other</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Total</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Single</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Family</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Other</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Total</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Single</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Family</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Other</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234
<b>Enrollment - Total</b>	1,234	1,234	1,234	1,234	1,234	1,234	1,234	1,234

# STRATEGIC PROCESS

## PHASE 1

## RX ANALYSIS



### Pottawatomie Pharmacy Benefit vs Targets

- Pottawatomie County Rx Utilization is **37%\*** of total medical spend versus benchmark of **10% - 20%**
- Revenue from Drug Manufacturers to Caremark and the KS Health Care Commission are completely **unknown**
- Pottawatomie County receives **0%** of the Rx rebates... **where are the rebates going?**
- With little **transparency**, how do Non-State Public Employers know the KS Health Care Commission is aligned with the best interests of the members of the Non-State Public Employer Plan?

\* Based on 2015 BCBS Data

# EXECUTIVE SUMMARY

## PHASE 2



## UNDERSTANDING YOUR OBJECTIVES

### ENGAGEMENT PRIORITIES

1

ADMINISTRATIVE SUPPORT

2

ENROLLMENT,  
EDUCATION &  
COMMUNICATION

3

REGULATORY/  
COMPLIANCE

4

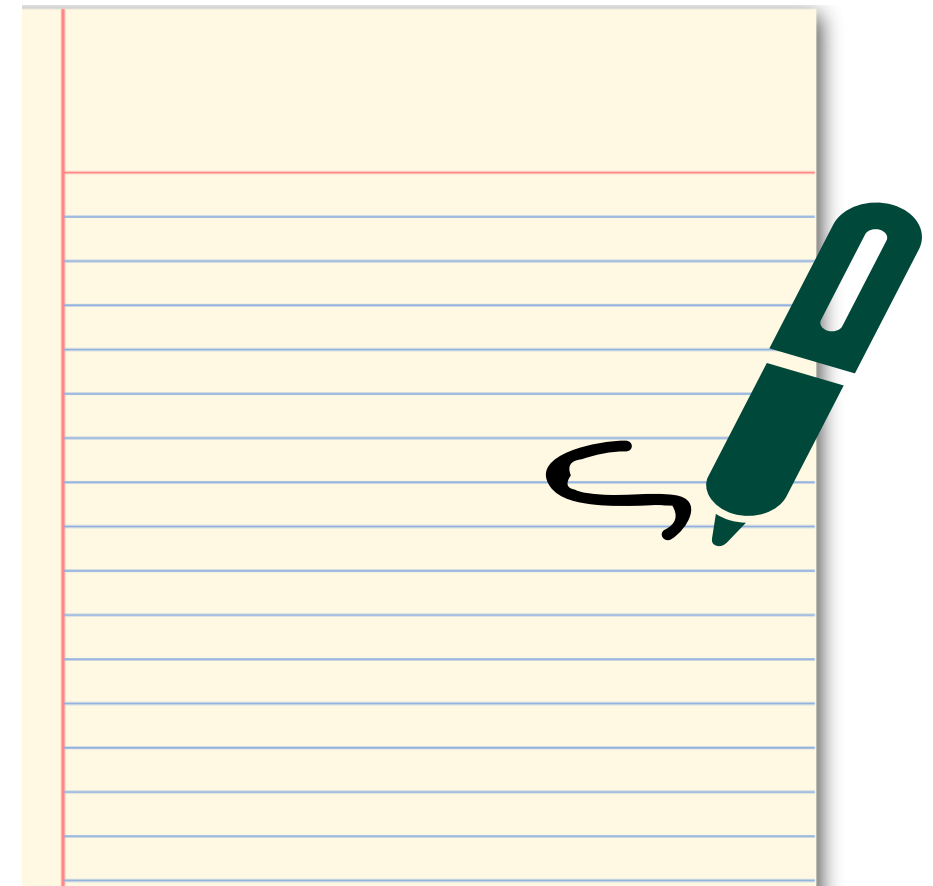
WELLBEING INITIATIVES

5

VALUE ADDED  
SERVICES

6

DATA ANALYTICS



# ADMINISTRATIVE SUPPORT

## PHASE 2



## ONGOING SUPPORT — CLIENT SERVICE

### CBIZ CLIENT SERVICE MODEL

#### Regulatory Affairs

- ACA
- Annual Compliance Checklist
- Federal & State regulation compliance/consultation
- Benefit Beat & At Issue
- For Your Benefit Manual
- Form 5500 preparation (as needed)
- Form 720 preparation
- Client training webinars
- ACA Bulletins
- Health Reform Benefits
- Chart of notice obligations

#### Plan Management & Renewals

- Monthly Service Discussion
- Quarterly review meetings
- Renewal planning & negotiations
- Marketplace search process
- Monthly financial reporting
- Contract provisions/process review
- Stewardship meetings
- Data analytics utilization review

#### Administrative Services

- Administrative processes
- Claims assistance/ resolution
- Billing and eligibility issues
- Open enrollment logistics
- Day-to-day service
- Enrollment technology
- Provider partner relations and management

#### Communication Education Delivery

- Open enrollment meetings
- Ongoing employee communications
- New employee orientations
- Employee presentations/surveys
- Employee webinars/videos
- Evaluation of best practice and next practice communication strategies

Industry specific experience

Enhanced through use of technology and data

# ENROLLMENT, EDUCATION & COMMUNICATION

## PHASE 2



## BENEFITS COUNSELING

CBIZ approaches the complicated task of educating and enrolling employees by offering a number of solutions:

### Group Meetings



We will meet with employees at the scheduled annual enrollment meetings.

We can prepare the presentation, invite the County's carriers to attend and review each handout for content and accuracy.

### Retiree Meetings



The needs of retirees, particularly those who are Medicare eligible, take special expertise. For this reason we invite Andy Burnham, Medicare Specialist, to group meetings. He frequently advises retirees in a one-on-one setting to discuss their concerns and budgets to find what's right for them.

### Custom Printed Materials



CBIZ offers a range of communication services, from basic enrollment support to customized communication campaigns. Materials are customized to look and feel like your organization's branding. This includes: Newsletters; Benefit enrollment guides, Brochures; flyers and more.

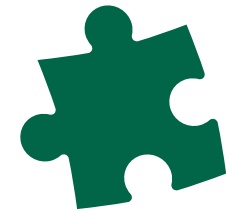
### Technology Resources



CBIZ has made significant investments in tools and resources to ease the open enrollment process. Utilizing your intranet and online enrollment website we can provide efficient data 24/7 for your employees and HR staff. A few of these resources include:

- FlippingBook
- [Brainshark - CLICK HERE](#)
- Advising next best practices
- [Custom benefits websites - CLICK HERE](#)

### Decision Support Tools



With dozens of vendor relationships in the fields of online enrollment, web-enabled mobile device communication, electronic administration and enrollment counseling, we will deliver a comprehensive, yet cost effective solutions, some include:

- Transparency Tools (i.e. Pre-Service Pricing)
- Comparison Shopping
- Stage of Life Decision Support
- Concierge Services
- Elder Care Options
- Mobile applications

# ENROLLMENT, EDUCATION & COMMUNICATION

## PHASE 2

## COMMUNICATION SAMPLES



### Custom Printed Materials

Company Logo

ABC Company - Sample Employee Benefits Enrollment Guide

Guide to Your 2017 Employee Benefits Program

A Message from the Interim Superintendent

Contents

- 2017 Plan Changes
- Health Plan Changes
- Health Savings Account
- Medical Reimbursement
- Life Insurance
- Disability Insurance
- Voluntary Retirement
- Flexible Spending Accounts
- Employee Stock Purchase Plan
- Employee Assistance Program
- Short-Term Disability
- Long-Term Disability
- Life Insurance
- Health Savings Account
- Medical Reimbursement
- Life Insurance
- Disability Insurance
- Voluntary Retirement
- Flexible Spending Accounts
- Employee Stock Purchase Plan
- Employee Assistance Program
- Short-Term Disability
- Long-Term Disability

2017 Health Savings Account and Medical Plan

2017 OPEN ENROLLMENT BENEFITS OVERVIEW

UPCOMING DATES TO REMEMBER

### Technology & Custom Website Capabilities

2015 Benefits Guide

CONTACT INFORMATION

ENROLLING IN THE PLANS

ELIGIBILITY

COMMUNICATION PARTNERS INC.

PROPOSAL FOR

CBIZ Benefits & Insurance Services of Kansas City Social Media Communications

May 6, 2015

Basic Principles: Health Savings Account (HSA)

Presented by: CBIZ



# WELLBEING INITIATIVES

## PHASE 2



# WELLNESS VS. WELLBEING

### Wellness Programs

Focus solely on physical wellness

#### Examples:

- Biometric screenings
- Health risk assessments
- Physical activity challenges
- Nutrition classes
- Weight loss programs



### Strategies to Energize Wellness Initiatives

#### Pottawatomie County's Wellbeing Program

- Employer Guide to Wellbeing
- Executive culture interview
- Senior Leadership wellbeing assessment and vision, mission and values development program
- Employee Interest Survey
- Workplace culture assessment
- Policies and physical environment assessment, analysis, recommendations
- Wellbeing team establishment

### Wellbeing Programs

Address the whole person

- **Purpose:** liking what you do each day and being motivated to achieve your goals
- **Social:** having supportive relationships and love in your life
- **Financial:** managing your economic life to reduce stress and increase security
- **Community:** liking where you live, feeling safe, and having pride in your community
- **Physical:** having good health and enough energy to get things done daily

0 - 1% VOI

3 - 4% VOI



Wellness Scorecard		2012	2013	2014	2015
		1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Employee Engagement	Number of Employees Who Completed HRSA	100%	100%	100%	100%
	Percentage of Employees Who Completed HRSA	100%	100%	100%	100%
	Percentage of Employees Who Completed HRSA	100%	100%	100%	100%
	Percentage of Employees Who Completed HRSA	100%	100%	100%	100%
Employee Health	Score: New York or Equivalent Overall Health (Self-Report)	88%	88%	88%	88%
	Score: Overall Health (Self-Report)	88%	88%	88%	88%
	Score: Physical Health (Self-Report)	88%	88%	88%	88%
	Score: Mental Health (Self-Report)	88%	88%	88%	88%
	Score: Financial Health (Self-Report)	88%	88%	88%	88%
	Score: Community Health (Self-Report)	88%	88%	88%	88%
	Score: Physical Activity (Self-Report)	88%	88%	88%	88%
	Score: Nutrition (Self-Report)	88%	88%	88%	88%
	Score: Weight (Self-Report)	88%	88%	88%	88%
	Score: Stress (Self-Report)	88%	88%	88%	88%
Score: Sleep (Self-Report)	88%	88%	88%	88%	
Employee Wellbeing	Employee Interest Survey	88%	88%	88%	88%
	Workplace Culture Assessment	88%	88%	88%	88%
	Policies and Physical Environment Assessment	88%	88%	88%	88%
	Wellbeing Team Establishment	88%	88%	88%	88%
	Employee Engagement	88%	88%	88%	88%
	Employee Health	88%	88%	88%	88%
	Employee Wellbeing	88%	88%	88%	88%
	Employee Satisfaction	88%	88%	88%	88%
	Employee Retention	88%	88%	88%	88%
	Employee Turnover	88%	88%	88%	88%
Employee Performance	Productivity	88%	88%	88%	88%
	Quality	88%	88%	88%	88%
	Customer Satisfaction	88%	88%	88%	88%
	Employee Retention	88%	88%	88%	88%
	Employee Turnover	88%	88%	88%	88%
	Employee Engagement	88%	88%	88%	88%
	Employee Health	88%	88%	88%	88%
	Employee Wellbeing	88%	88%	88%	88%
	Employee Satisfaction	88%	88%	88%	88%
	Employee Retention	88%	88%	88%	88%



# VALUE ADDED SERVICES

## PHASE 2



### Trends & Innovations

You'll be kept up to date about new developments in insurance and employee benefits, the impact on you and tips to maximize your current investment.



### Integration

Using CBIZ experts and resources to align your wellbeing and plan design strategies for optimal results

Result in lower premiums and better outcomes



### Pharmacy Innovations

CBIZ's Pharmacy Consultants analyze the feasibility of achieving savings through contract evaluation and purchasing coalitions



**IMPROVE  
PRICE  
TRANSPARENCY**

### NavMD

This data analytics tool can be customized to use clinic and health plan data, benchmark, risk identification, mitigate costly utilization patterns and evaluate self-funding.



### Technology

Leverage technology and apply best practices to enhance employee engagement, education and consumerism. Also used to assist with executive decision making.



### Risk Mitigation

CBIZ Regulatory Affairs provides timely alerts on the ever changing legislation along with assistance in application of current regulations and how they specifically apply to the County



### Data Analytics Leads to the Ability to:

#### Analyze & Act

- Stratify risk
  1. Case Management Opportunities (High Cost Members)
  2. Disease Management Opportunities (High/Low Disease Burden Members)
  3. Wellness Opportunities (Low Cost/Cost Members)
- Utilization and Cost Benchmarks
- Pharmacy Savings Opportunities through Conversion Analyzer

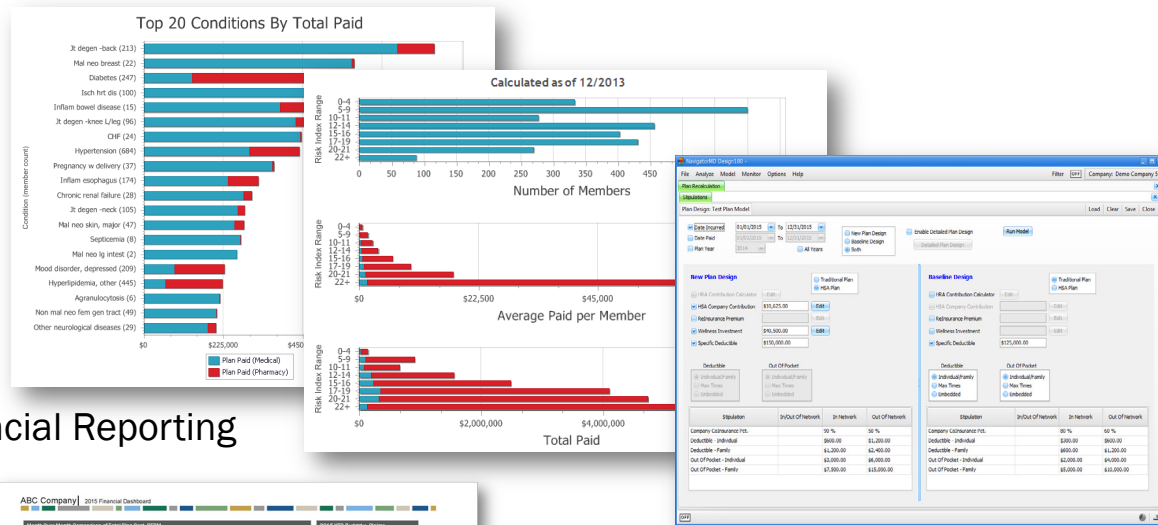
#### Track & Trace

- Year to Year Changes of Risk Score and Core Gap Score
- Ability to drill down to member and the provider Level

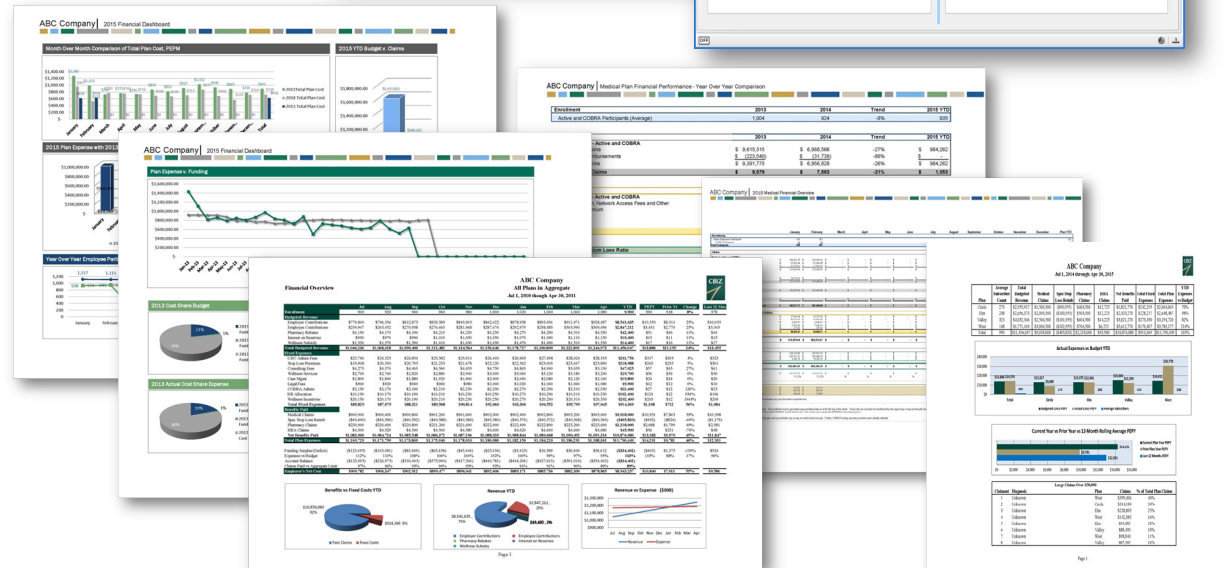
#### Model & Mix

- Plan Changes & Benefit Additions
- Migration Modeling
- Predictive Modeling of Future Costs and Risks
- Plan/Contribution Mix Initiatives to Promote a Higher Level Of Wellness Participation

### Predictive Modeling/Risk Forecasting



### Financial Reporting



# RECAP



*Focus on quality, delivering the very best service and innovation through true partnership, to create a better experience for the Pottawatomie County.*

## CAPABILITIES

- CBIZ client value proposition – proactively control costs, ensure compliance, streamline administration and increase the health & productivity of work force
- Client-focused and strategically driven partnerships
- Strong vendor partner relationships
- Experience in wellbeing strategies and population health management
- Customized communications

## RESOURCES

- Local consulting representation with a national footprint
- Integrated expert actuarial team
- Analytic tools with in-house actuarial support
- Meaningful integration of wellbeing/ clinic resources
- CBIZ Compliance Group
- CBIZ Wellbeing Solutions and Pharmacy Consulting Practice
- Enrollment technology and support

## EXPERTISE

- Expertise in self-funding and risk evaluation
- Understanding the impact of healthcare reform (Affordable Care Act)
- Specialized in-house expertise
- Sourcing of communication, analytics and transparency tools
- Experienced and technically proficient team - combined tenure of over 50 years

## FEES

### PHASE 1: Flat Fee

- \$15,000

### PHASE 2: Annual Fee

- \$18 Per Employee Per Month (PEPM) *minus* Phase 1 credit of (\$15,000)