CITY OF LEE'S SUMMIT
PROCUREMENT AND CONTRACT SERVICES DEPARTMENT
220 S.E. GREEN STREET LEE'S SUMMIT, MO 64063
Phone: 816-969-1087 Fax: 816-969-1081
deedee.tschirhart@cityofls.net

TITLE-SIGNATURE PAGE REQUEST FOR

PROPOSAL NO. 2017-060

The City of Lee's Summit will accept electronically submitted proposals through Public Purchase from qualified persons or firms interested in providing the following:

HEALTH INSURANCE AND EMPLOYEE BENEFIT BROKERAGE/CONSULTING SERVICES
IN ACCORDANCE WITH THE ATTACHED SCOPE OF SERVICES

PROPOSALS MUST BE UPLOADED INTO PUBLIC PURCHASE E-BIDDING SYSTEM PRIOR TO THE CLOSING DATE OF MONDAY, JANUARY 9, 2017, 2:00 P.M. LOCAL TIME

It is the responsibility of interested firms to check the City's e-bidding system, Public Purchase at http://www.publicpurchase.com/gems/leessummit.mo/buyer/public/publicInfo for any addendums prior to the closing date and time of this Proposal. All addendums must be signed and included with submitted proposal.

The City reserves the right to reject any and all proposals, to waive technical defects, and to select the proposal(s) deemed most advantageous to the City.

The undersigned certifies that he/she has the authority to bind this company in an agreement to supply the service or commodity in accordance with all terms and conditions specified herein. Please type or print the information below.

Respondent is REQUIRED to complete, sign and return this form with their submittal.

Holmes Murphy & Associates Company Name	Jeff Spencer Authorized Person (Print)
1828 Walnut Street, Suite 700 Address	 Signature
Kansas City, MO 64108 City/State/Zip	Sr. Vice President Title
(816)857-7800 (866)501-9322 Telephone # Fax#	1/9/2017 Date
42-0985055 Tax ID No.	S-Corp Entity Type

ENCLOSURE III
TABLE OF CONTENTS

The following table sets forth the specific items to be addressed in the proposal. Respondents are requested to use this page with their proposal and with the corresponding page numbers indicated on the information submitted within their proposal:

A.	TITLE-SIGNATURE PAGE	Page 1
B.	TABLE OF CONTENTS: Submit this page with page numbers provided.	Page 2
C.	LETTER OF TRANSMITTAL: Limit to four (4) pages; to be submitted on the provider's letterhead. 1. Concisely state the provider's understanding of the services required by the City. 2. Include additional relevant information not requested elsewhere in this RFP. 3. The signature of the letter shall be that of a person authorized to represent and bind the firm/provider.	Attachment
D.	ADDENDA (if applicable) The respondent must return the correct number of all numbered addenda with submitted proposal. All Addenda must be signed.	Attachment
E.	PROVIDER PROFILE: Form 1 provided	Page 3
F.	LIST OF OUTSIDE KEY CONSULTANTS/ASSOCIATES OR AGENCIES THAT WILL BE USED FOR THE CITY'S SERVICE: Form 2 provided	Page 4
G.	EXPERIENCE/REFERENCES: Form 3 provided (Form 3 may be reproduced and attached in sequence if more space is required).	Page 5 - 7
H.	RESUMES OF KEY PERSONNEL: Form 4 provided (Form 4 may be reproduced and attached in sequence if more space is required).	Page 8-13
I.	PROJECT APPROACH NARRATIVE: Form 5 provided (This form must be signed and dated).	Page 14 - 24
J.	COST: Forms provided: 6A & 6B	Page 25-26
K.	Affidavit, Work Authorization - Form provided (Must be signed, notarized and submitted prior to the issuance of a contract-if applicable (over $5,000	Page 27
L.	E-Verify Program's Memorandum of Understanding Electronic Signature Page (Must be submitted prior to the issuance of a contract-if applicable (over $5,000)	Page 28

FORM NO. 1: PROVIDER PROFILE

1. Lead Service Provider/Firm(s) (or Joint Venture) Name and Address: Holmes Murphy & Associates
1828 Walnut Street, Suite 700
Kansas City, MO 64108

1a. Provider /Firm is: ___ National _X_ Regional ___ Local

1b. Year Provider/Firm Established: 1932 (Kansas City office opened in 2003)

Years of Experience providing RFP identified services/project for municipalities: 10 Years
Year of Experience providing Insurance Broker Services: 14 Years

1c. Licensed to do business in the State of Missouri: _X_ Yes ___ No

1d. Principal contact information: Name, title, telephone number and email address: Jeff Spencer
Sr. Vice President
(816)857-7802
jeff.spencer@holmesmurphy.com

1e. Address of office to perform work, if different from Item No. 1: N/A

2. Please list the number of persons by discipline that your Firm/Joint Venture will commit to the City's project or the services to be provided:
6 persons dedicated to Strategy, Financial Analysis, Communication, Compliance, Day-to-Day Service and Overall Program Success.

3. If submittal is by Joint Venture or utilizes subcontractors, list participating firms / providers and outline specific areas of responsibility (including administrative, technical, and financial) for each firm:
Bob Charlesworth, Charlesworth Benefits, L.C. - Strategic & Renewal Assistance

3a. Has this Joint Venture previously worked together? ___ Yes _X_ No

FORM NO. 2: KEY OUTSIDE CONSULANTS
Each respondent must complete this form for all proposed sub-consultants.

SUB-CONSULTANT #1
Name & Address: Charlesworth Benefits, L.C.
P.O. Box 23588
Overland Park, KS 66283
(913) 851-4730

Specialty/Role with this Project: Strategic Renewal Support and Historical Context

Worked with Lead Firm Before: _X_ Yes ___ No
Year Firm Established: 1984
Years of Experience providing insurance broker services: 32 Years

- Complete Form 4 for all key personnel assigned to this project for this sub-consultant.

SUB-CONSULTANT #2
Name & Address

Specialty / Role with this Project:

Worked with Lead Firm Before: ___ Yes ___ No
Year Firm Established:
Years of Experience providing insurance broker services

- Complete Form 4 for all key personnel assigned to this project for this sub-consultant.

SUB-CONSULTANT #3
Name & Address

Specialty / Role with this Project:

Worked with Lead Firm Before: ___ Yes ___ No
Year Firm Established:
Years of Experience providing insurance broker services

- Complete Form 4 for all key personnel assigned to this project for this sub-consultant.

FORM NO. 3: EXPERIENCE/REFERENCES

Work by Service Provider/Firm (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the City's project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the City's project. List no more than ten (10) total projects:

Project Name & Location: Liberty Public Schools

Completion Date (Actual or Estimated): Ongoing

Project Owners Name & Address: Liberty Public Schools (Broker of Record since June 2011)

8 Victory Lane

Liberty, MO 64068

Project Owner's Contact Person, Title & Telephone Number: Dr. Robert J. Vogelaar

Assistant Superintendent, Human Resources

(816) 736-7183

Estimated Cost (in Thousands) for Entire Project: $220,000

Estimated Cost (in Thousands) for work performed by responsible Service Provider/Firm: $220,000

Scope of Entire Project (Please give quantitative indications wherever possible): Full Brokerage and Consulting Services

Nature of Service Provider's/Firm's responsibility in project (Please give quantitative indications wherever possible):
Full Brokerage and Consulting Services

Service Provider's/Firm's Personnel (Name/Project Assignment) who worked on the stated project that shall be assigned to the City's project: Jeff Spencer
Matt Wheeler

FORM NO. 3: EXPERIENCE/REFERENCES
– CON'T

Work by Service Provider/Firm (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the City's project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the City's project. List no more than ten (10) total projects:

Project Name & Location: City of Leawood

Completion Date (Actual or Estimated): Ongoing (Broker of Record since September 2015)

Project Owners Name & Address: City of Leawood

4800 Town Center Drive

Leawood, KS 66211

Project Owner's Contact Person, Title & Telephone Number: Nic Sanders

Director, Human Resources

(913) 661-7005

Estimated Cost (in Thousands) for Entire Project: $67,000

Estimated Cost (in Thousands) for work performed by responsible Service Provider/Firm: $67,000

Scope of Entire Project (Please give quantitative indications wherever possible): Full Brokerage and Consulting Services

Nature of Service Provider's/Firm's responsibility in project (Please give quantitative indications wherever possible):
Full Brokerage and Consulting Services

Service Provider's/Firm's Personnel (Name/Project Assignment) who worked on the stated project that shall be assigned to the City's project:
Jeff Spencer
Matt Wheeler
Amanda Collier
Candise Clark

FORM NO. 3: EXPERIENCE/REFERENCES
CON'T

Work by Service Provider/Firm (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the City's project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the City's project. List no more than ten (10) total projects:

Project Name & Location: City of Raymore

Completion Date (Actual or Estimated): Ongoing (Broker of Record since September 2015)

Project Owners Name & Address: City of Raymore

100 Municipal Circle

Raymore, MO 64083

Project Owner's Contact Person, Title & Telephone Number: Shawn Aulgur

Human Resources Manager

(816) 892-3005

Estimated Cost (in Thousands) for Entire Project: $36,250

Estimated Cost (in Thousands) for work performed by responsible Service Provider/Firm: $36,250

Scope of Entire Project (Please give quantitative indications wherever possible): Full Brokerage and Consulting Services

Nature of Service Provider's/Firm's responsibility in project (Please give quantitative indications wherever possible):
Full Brokerage and Consulting Services

Service Provider's/Firm's Personnel (Name/Project Assignment) who worked on the stated project that shall be assigned to the City's project:
Jeff Spencer
Matt Wheeler
Candise Clark

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Jeff Spencer, Sr. Vice President

b. Project Assignment: Strategy development and execution, oversight of day-to-day program initiatives and managing client expectations

c. Name of Service Provider/Firm with which associated: Holmes Murphy & Associates

d. Years Experience:
With this service provider/firm 13 other service providers/firms 7

e. Education: Degree(s)/Year/Specialization: B.S. Business Administration, University of Kansas

f. Current Registration(s): Life and Health Insurance License

g. Other Experience & Qualifications relevant to the proposed project: Jeff opened the Kansas City branch of Holmes Murphy in 2003 after serving as Director of National Accounts for UNUM. Jeff has grown the office significantly and it is currently the fastest growing employee benefits operation in Kansas City. While building a client-first environment, Jeff has attracted the top talent in the region, which has allowed Holmes Murphy KC to be named as one of the Best Places to Work for 9 of the last 10 years.

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Matt Wheeler, Vice President of Client Services, Employee Benefits

b. Project Assignment: Support of financial aspects of health and welfare plans; cost impact studies and creative financial modeling to help design, monitor and implement benefit plans to support client strategies

c. Name of Service Provider/Firm with which associated: Holmes Murphy & Associates

d. Years Experience:
With this service provider/firm 10 other service providers/firms 5

e. Education: Degree(s)/Year/Specialization: B.A. Philosophy, University of Missouri

f. Current Registration(s): Life & Health Insurance License
Group Benefit Associate (GBA)

g. Other Experience & Qualifications relevant to the proposed project: Matt serves as lead consultant for a number of public entity clients including, North Kansas City School District, City of Leawood, Liberty Public Schools, Johnson County Community College, Spring Hill School District and The Empire District Electric Cooperative. Matt is skilled in finding unique financial solutions to meet the budgeting constraints of public entities.

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Shea Bollin, Business Development Consultant

b. Project Assignment: Support service strategy and financial aspects of health and welfare plans

c. Name of Service Provider/Firm with which associated: Holmes Murphy & Associates

d. Years Experience:
With this service provider/firm 2 other service providers/firms 12

e. Education: Degree(s)/Year/Specialization: B.S. Business Administration, University of Kansas

f. Current Registration(s): Life & Health Insurance License
Property & Casualty Insurance License
Group Benefit Associate (GBA)

g. Other Experience & Qualifications relevant to the proposed project: Shea serves the role of financial consultant assisting with a number of clients including Garmin, Spring Hill School District, Meredith Corporation and Dimensional Innovations. Shea assists the team with overall strategy development for our clients' employee benefit programs.

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Amanda Collier, Client Service Consultant

b. Project Assignment: Responsible for operational management activities, including communication planning and development, resolving claim issues, working with vendors to implement plan design changes, directing open enrollment meetings, etc.

c. Name of Service Provider/Firm with which associated: Holmes Murphy & Associates

d. Years Experience:
With this service provider/firm 1 other service providers/firms 5

e. Education: Degree(s)/Year/Specialization: B.A. Sociology & Spanish, Kansas State University
M.B.A., University of Kansas

f. Current Registration(s): Life & Health Insurance License
Certified Employee Benefit Specialist (CEBS)
Group Benefits Associate (GBA)
Compensation Management Specialist (CMS)
Health Insurance Associate (HIA)

g. Other Experience & Qualifications relevant to the proposed project: Amanda serves as the primary day-to-day contact for the City of Leawood, as well as National Bank of Kansas City, Alpine Bank and Midwest Trust Company. Amanda is a skilled customer service professional who regularly exceeded client expectations.

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Candise Clark, Client Service Consultant

b. Project Assignment: Responsible for operational management activities, including communication planning and development, resolving claim issues, working with vendors to implement plan design changes, directing open enrollment meetings, etc.

c. Name of Service Provider/Firm with which associated: Holmes Murphy & Associates

d. Years Experience:
With this service provider/firm 6 other service providers/firms 18

e. Education: Degree(s)/Year/Specialization: Johnson County Community College

f. Current Registration(s): Life & Health Insurance License

g. Other Experience & Qualifications relevant to the proposed project: Candise serves as the primary day-to-day contact for the City of Raymore, as well as Crossfirst Bank. She also assists with servicing Gardner Edgerton School District, City of Leawood and Johnson County Community College. Candise has been serving clients and their employee benefit programs for over 25 years.

FORM NO. 4: RESUMES OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual service providers that shall be assigned to the City project:

a. Name and Title: Bob Charlesworth

b. Project Assignment: Strategic renewal support and historical reference

c. Name of Service Provider/Firm with which associated: Charlesworth Benefits, L.C.

d. Years Experience:
With this service provider/firm 32 other service providers/firms ___

e. Education: Degree(s)/Year/Specialization: B.S. Business Administration with Insurance Minor, Missouri State University

f. Current Registration(s): Life & Health Insurance License
Property & Casualty Insurance License
Chartered Property & Casualty Underwriter (CPCU)
Associate in Insurance Services (AIS)
Associate in Loss Control Management (ALCM)
Associate in Risk Management (ARM)

g. Other Experience & Qualifications relevant to the proposed project: Bob has served the City of Lee's Summit since 1997

FORM NO. 5: PROJECT APPROACH NARRATIVE

Use this space to provide a detailed project approach including but not limited to:

- Project schedule and detailed approach is reasonable/responsive to City's needs
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by pre-proposal attendance, proposal/interview (if applicable)
- Identify/recognize critical or unique issues specific to the project and successful critical or unique approaches used elsewhere
- Proposed communication process

We have outlined our project approach for the City on the following pages.

Holmes Murphy & Associates Company Name	Jeff Spencer Authorized Person (Print)
1828 Walnut Street, Suite 700 Address	 Signature
Kansas City, MO 64108 City/State/Zip	Sr. Vice President Title
(816)857-7800 (866)501-9322 Telephone # Fax#	1/9/2017 Date
42-0985055 Tax ID No.	S-Corp Entity Type

EMPLOYEE BENEFITS EXPERIENCE/ SERVICES

Organizational Consistency:
Advising, Creating, Negotiating, Implementing, & Managing your Programs

Our work begins by conducting strategy sessions and discussions to develop and then confirm the short-term and long-term goals of the benefits program. Through this interaction with your benefits leadership team, we identify and detail your objectives and the measures of success. These become the basis for the overall program strategy and project management. We hold ourselves accountable to delivering on these objectives and continually measure performance versus the program goals.

HMA regularly conducts customer surveys to determine why they selected our firm as their benefit advisor. The survey consistently confirms that our clients ***hire us and keep us*** because of our **Expertise, Buying Power/Negotiations, and Human Resources Support**.

Expertise

A primary area of focus throughout our relationship with City will be to leverage our expertise and emphasize strategy development and design. Our goal is to ensure the plan is structured to offer the best possible solutions that meet employee needs without overburdening the City financially or administratively. The expertise of HMA team members and strategic partners will be critical in accomplishing this goal for you.

Overall Program Strategy
Strategy Meetings
Employee Communication
Marketing & Due Diligence
Technology Utilization
Program Audit & Review
Budget Analysis & Support

Compliance
Key Indicator & Vendor Reporting
Actuarial Financial Projections
Plan Efficiency Analysis
Utilization Monitoring
Wellness & Condition Mgmt Strategies
Benchmarking Analysis

Overall Program Strategy

Our work will begin by implementing our Benefit Performance Management process. ***Benefit Performance Management*** enables us to **design, source, implement and maintain** benefit programs. The system is based upon our understanding of the inter-dependence of the three measurement categories in benefit programs: **administration**, **finance** and **delivery**.

The ideal benefits program for most companies makes benefits a "non-issue".

- **For your employees**, we mean that the benefits provide peace of mind and user-friendly administration so that they can focus on their job responsibilities.
- **For the City,** we mean you can focus on your core business without undue financial or administrative burden - **no surprises**.

To achieve a "non-issue" status, a plan must be **well-conceived**, purchased from the **right vendors, implemented effectively,** and **continually monitored**.

- ***Well-conceived*** – The best possible solution is a design that meets employee needs while maximizing fiscal and human resources.

- ***Right Vendors*** - The richest plan design is of little value if the vendor cannot administer the program consistently and accurately. Because of volatility in the insurance industry, selection of appropriate vendors has never been more important.

- ***Implemented Effectively*** - The right plan from the right vendor is still of little value if employees do not understand: (1.) what they have or (2.) how to access the programs. It is also critical that their initial experience be positive so that they do not lose confidence in the plan due to administrative installation problems.

- ***Continually Monitored*** – A surprise in a benefit plan is seldom a good thing. Therefore, it is important to effectively and efficiently monitor financial and administrative performance of even the best benefit programs to avoid year-end surprises.

Our Benefit Performance Management system comes to life by engaging your stakeholders to understand where your programs are today and what you want to accomplish in the future. This process is perpetual in nature and becomes the basis for on-going program strategy.

Strategy Meetings

We will conduct formal review and strategy meetings as often as the City desires. To make the process as easy for your team as possible, we fully coordinate these sessions to include a review of the actual costs versus budget projections, utilization analysis, and a discussion of trends and opportunities.

Program Audit & Review

A consistent and comprehensive audit of the current benefits program is essential. We maintain a thorough understanding of all elements of your current benefit plans. As we review the programs each year, we keep two basic questions in mind: "What's working?" and "What's broken?"

Key Indicator & Vendor Reporting

Our primary role in reporting and analysis is to bring life to vendor data. It should not be your job to sort through potentially hundreds of pages of reports to try to figure out what is happening with the costs and why. We will provide the vendor data analysis and deliver a meaningful summary of the information providing clear answers. The end result of the analytical process will not only offer observations of what is happening, but will also include recommendations and solutions that could be implemented to influence future outcomes.

Actuarial Support

The support of our Actuarial unit is also available to help project future costs and analyze change opportunities. Mark Van Buskirk, Ph.D. is our full time in-house Chief Actuary and will assist in critical technical areas.

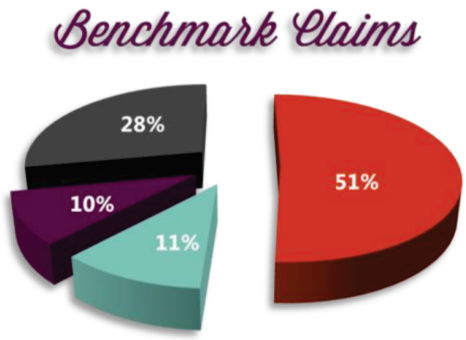
Wellness & Condition Management Strategies

HMA is the leader in helping employers understand their role in the complex world of healthcare consumerism and focused interventions. Wally Gomaa, MBA/MHA, has depth of expertise in the area of utilization, wellness, and disease management consulting. Recently, HMA added Dr. Tim Church as Physician General and Todd Whitthorne as President to further add to our expertise in this critical area. Both Tim and Todd have tremendous expertise and knowledge in the wellness and condition management arena.

We believe that our understanding and commitment to this area is one of the single greatest features that set us apart from our competitors. Shifting costs to plan participants through "consumer-directed" plans is only part of the emerging healthcare cost control environment. HMA is helping employers understand how focused, clinically based intervention will impact your health plan, culture and employees.

Benchmarking Analysis

HMA conducts an annual survey of employers that includes over 450 plans across several industries. In addition, we often conduct industry and geographic location specific surveys for our clients. We welcome the opportunity to support you in any specific survey initiatives you might have including focused surveys of other employers in your labor force market areas.



Design Strategy and Option Modeling

Emerging trends (i.e. consumerism, health & wellness, etc.) will continue to have a profound impact on future plan design options and decisions. Understanding the selection patterns and how that can increase or decrease the ultimate costs is critical in designing a multi-tiered plan program.

Best Practice Trends

On behalf of our clients, we are actively in the market managing bid/selection projects and performing vendor negotiations. Of equal importance, we are continually building upon our unique knowledge-sharing structure that allows us to stay on top of trends in all benefit areas. HMA will continue to combine our understanding of

your needs with our market insight to proactively present best practices and emerging opportunities that present the best fit for the City.

Buying Power and Negotiations

In addition to our benefits expertise, another of the top reasons our customers hire HMA is for our buying power and negotiating approach. We will utilize our unique system to ensure you select the best programs at the best price.

Buying Power & Negotiations

- Internal Underwriting
- Vendor Negotiations
- Leveraging Size & Growth
- Leveraging Affiliations

Internal Underwriting

Our belief is that the most effective negotiations come from having the deepest understanding of the data. We will perform internal underwriting on your behalf so that vendor negotiations are based on valid actuarial assumptions rather than market rates. This approach consistently places us in the best possible position to negotiate favorable terms with vendors and we are confident it will yield the best possible price for the City.

Vendor Negotiations

We will facilitate all negotiations with vendors. This will include a detailed initial review of the current programs to ensure that there are effective terms and provisions in the contracts.

HMA will conduct all RFP's for health and welfare programs where opportunities for improvement are possible. In addition, we have strong relationships with your current vendors. We will maintain vendor oversight to ensure that they are delivering appropriate levels of performance.

Leveraging Size & Growth

The combined annual health and welfare expenditures for our HMA client base are over $1.50 billion in equivalent premium. HMA negotiates hundreds of benefit renewals per year on behalf of our clients; we use this negotiating strength to ensure that you receive the best possible price for the highest quality products and services.

Leveraging Affiliations

We currently participate on the National Advisory Boards for Aetna, CIGNA and United Healthcare and are involved with the Blue Cross National Consortium. In addition, we have preferred broker status with the majority of insurance companies in the market.

Our participation on these committees provides HMA and our clients additional tools and services that are not readily available in the general market. It also provides us with insight into the strategic direction of vendor companies and places us in a highly desirable position to negotiate the best possible contract terms. During the RFP process as well as during renewals, we leverage these affiliations on behalf of the City.

Human Resources Support

- Communication Support
- Communication Materials
- Compliance Support
- Client Education & Training Program
- Team Approach – Unlimited Access to HMA Benefit Team

Human Resources Support

HMA has a strategic approach to human resources support that includes robust communication, compliance and education tools.

These resources are powerful in themselves, but our associates make the difference. The City's HMA team is committed, passionate, experienced and prepared to continue to be a meaningful extension of your benefit department.

Communication Support

HMA will support the City's employee communication campaign on a number of fronts including open enrollment, onsite employee communication, customized support materials and special projects. Holly Monson acts as the first line of communication support in all areas and will be present at the City for employee assistance in accordance with the City's desires.

We understand the communication challenges of a diverse workforce and support you with the development of customized communication materials such as brochures, open enrollment guides, enrollment videos, and web implementations.

Mark Fitzgibbons, a full-time Benefits Communication Consultant, is available to assist the City to achieve maximum impact from your benefits communications program.

Communication Materials

HMA will produce custom communication materials for distribution to the City employees. Some examples include company policy handbooks, employee benefit handbooks, total compensation statements, open enrollment announcements and newsletters, wellness campaign brochures and informational brochures detailing the City-specific initiatives.

Compliance Support

HMA will support the City's compliance needs in a number of ways. HMA has assigned, Ed Oleksiak, Esq., in-house attorney, to assist in all compliance area HMA also has the services of Littler Mendelson, a national employee benefits law firm on retainer for ongoing compliance and legal assistance. Locally, we maintain a relationship with the Polsinelli law firm.

Our support commitment includes an online resource available to internal and external customers. We also coordinate and develop training materials for your benefit representatives to improve their knowledge of benefit plan details and administration.

Client Education & Training Program

Providing continuous education about latest industry trends, products and legislative activities, is an added value for our customers. HMA is nationally known for conducting high impact seminars and is commonly a key speaker at several association meetings.

ADDITIONAL VALUE–ADDED SERVICES

Deerwalk Health 360° is HMA's "big-data" analytics platform and longitudinal data warehouse hosted by Deerwalk, the industry's most advanced health analytics system. Deerwalk has the ability to integrate and correlate data allowing HMA to objectively measure results and maintain past history, even if a client elects to change carriers. The system gives our clients an objective approach to managing health

care through continual data analysis, gaps in care, risk and chronic disease management insight. Its powerful functionality includes the following:

- Track and measure performance of health improvement and wellness programs by health status and cost
- Measure ROI for capital investment in health improvement via cohort analysis
- Increased transparency and carrier assessment by utilizing our data engine and not carrier captive data
- Improved negotiation and underwriting leverage
- Detailed benchmarking of the City's plan outcomes versus Truven's massive database
- Streamlined reporting

ThinkHR

HMA provides customers with a human resources service known as ThinkHR at no cost. ThinkHR integrates cloud based technology along with access to live experts to provide customers with a wide variety of HR resources and solutions. The ThinkHR experts are seasoned, trained, credentialed professionals who have a vast experience in the HR arena. Areas addressed by ThinkHR include:

- **ThinkHR Live** – a team of HR advisors that answer questions and provide written summary for areas including compliance, leave of absence, wage and hour, terminations, recruiting & hiring and employee relations, benefits, investigations and worker's compensation among others.

- **ThinkHR Learn**- delivers the courses and solutions that matter most to organizations, helping them stay compliant and empowering HR staff and employees with the information and tools to grow professionally. There are hundreds of training and educational videos in the ThinkHR library. HMA has found that our customers especially value the following videos for their staff and employees: HIPAA – Your Obligations Under the Privacy Rule, FLSA What Supervisors Need to Know, All About Nutrition (for your wellness program), Financial Wellness (for your wellness program), How to Explain Benefits to New Hires, Terminating Employees – Checklist and the Process, FMLA – What Supervisors Need to Know, How to Conduct New Employee Orientation, ADA - What Supervisors Need to Know, Office Ergonomics, and many more!

- **ThinkHR Comply** – a web-based resource center for HR professionals. Contains thousands of forms, documents, tools and checklists. The site is up to date on the latest HR news and trends. Features of the resource center include: a Q&A database, customizable communication materials, benchmarking information, compliance guidelines, links to state and federal employment law, hiring and termination guidelines, health care reform center and HR whitepapers, in addition to many other features.

Zywave – Benefits, HR Content and Decision Support

The City will have access to the Zywave platform which provides a wealth of insurance-related tools and information. These services enhance our commitment to providing you the latest in strategic planning, expertise, innovation and technology. Largely speaking, we utilize the Zywave resources on your behalf and deliver content without the need for the City to directly access.

MyWave® Portal

We extend access to many services via a personalized MyWave® Portal Web site. Access offers you time-saving tools and resources that build convenience into managing your everyday work tasks. MyWave® will allow the City to collaborate with HMA online, access timely information and resources, or connect with human resource peers. Areas included under the MyWave® Portal include: Collaboration Center, Benchmarking Surveys, Compliance & Legislative Guides, and Resources & Employer Education, Healthshop and document templates.

PlanAdvisor™

PlanAdvisor™ provides a decision support selection tool as an option for employees to utilize in making plan design elections.

COBRA Solutions

HMA has a strategic partnership with multiple vendors to provide outsourced COBRA services. Our partnerships provide a **turnkey** approach, minimizing risk exposure and providing peace of mind that compliance requirements are being met. They only require that the plan sponsor simply notify the vendor of new plan members and those with qualifying events, either telephonically or via website.

The Compass Transparency Program

The Compass program accomplishes a number of health insurance and benefits related functions. It acts as a concierge service for employees to access regarding specific medical, vision and dental questions. The compass "Health Pro" is a live person dedicated to assisting employees by providing information regarding **actual cost of service transparency** for physician referred services, EOB and billing reconciliation, pharmacy price transparency, medical record history as well as general insurance and medical service information.

Insurance Benefit Exchange (IBX)

IBX is a technology platform focused on Life, Disability, Stop Loss and Dental insurance. It provides a streamlined procurement and program cost savings. First it allows HMA to place request for proposal (RFP) data on-line and ensures that the carrier markets respond accurately and timely. Data remains in the system in perpetuity, ensuring that current and future client RFP's can be out to market in efficiently and without re-work.

The second exciting IBX feature is the use of an "on-line reverse auction" (like EBay) for carrier participation when providing final pricing. Carriers view their ranking versus competitors and amend pricing real time as often as they desire during the auction window. This procurement process has produced average premium savings of 20-30% versus our clients' in-force or renewal rates.

We would be delighted to provide the City with a demo of any of these exciting value-added services.

PROPOSED ASSIGNED STAFF, STAFF QUALIFICATIONS, EXPERIENCE & CREDENTIALS

By building our firm with individuals that come from very specialized backgrounds, the talent of our people is a major differentiator. Our people come from several of the large national consulting houses, national health plans, and Fortune 500 companies. Each left his/her respective organizations to work in an environment that provides complete freedom to think creatively without constraints. We believe the HMA environment allows our talent to deliver the best solutions for our customers.

We do not work in a "silo" system where one team works on all of the same customers. Our culture is built on sharing knowledge and experiences, where we strive to pull the appropriate levels of expertise at the appropriate time from within our pool of experts. The goal in building our organization was to provide the appropriate areas of **expertise that a customer could find in one of the country's largest consulting firms, but to do this with the customer service feel of a strong regional firm.** We believe that we have met these goals with in-house actuarial, legal/compliance, communication, and medical management measurement expertise that is available to all of our clients on an as-needed basis.

Primary Service Team: *YOUR DEDICATED SERVICE AND CONSULTING TEAM WILL INCLUDE AMANDA COLLIER, SENIOR CLIENT SERVICE CONSULTANT, EB; CANDISE CLARK, CLIENT SERVICE CONSULTANT, EB; SHEA BOLLIN, BUSINESS DEVELOPMENT CONSULTANT; MATT WHEELER, VICE PRESIDENT SERVICE, EB; JEFF SPENCER, SENIOR VICE PRESIDENT; AND JARRET SCHMIDT, SENIOR VICE PRESIDENT.* HMA WILL BE PARTNERING WITH CHARLESWORTH BENEFITS, L.C. TO ASSIST WITH SERVICES PROVIDED TO THE CITY.

Amanda and Candise will be responsible for coordinating and monitoring all of the services provided by HMA and your vendors; they will be the City's primary daily contacts. Matt oversees all aspects of client service including financial reporting, plan design strategy and wellness programming. Jeff and Bob Charlesworth will be strategic partners throughout the relationship with HMA. Additionally, Jarret is responsible for voluntary benefit program implementation. We believe it is critical for clients to have access to a HMA representative familiar with your plans at all times, and we work diligently to ensure every member of your team is involved in or aware of all aspects of your plans and their performance.

Specific Expert Team: In addition to your Primary Services Team, the following team will also be integral at specific points during the plan year depending on project requirements.

- Compliance - Ed Oleksiak, Esq.(Senior Account Executive)
- Legal – Littler Mendelson & Polsinelli
- Actuarial - Mark Van Buskirk, PhD (Chief Actuary)
- Wellness Strategy - Wally Gomaa, MBA/MHA (President ACAP Health)
- Communication – Mark Fitzgibbons (Communication Specialist)

Our account management philosophy is to remain actively involved in all aspects of our customer relationship from program reviews, through implementation, and the continued monitoring of vendor relationships and plan performance. This approach distinguishes us from our competition, many of whom prefer to have a limited role in the ongoing management of vendor/client relations as they pursue new business opportunities.

Our normal business hours of operation are 8:00 a.m. to 5:00 p.m. central standard time; however, we are very flexible and accessible to our clients - - a commitment that the City can count on. When you call us with a question, you **WILL** receive a call back for discussion and swift resolution.

Additionally, all of our associates utilize smart phone technology to receive emails and phone calls during and after normal business hours**.**

Direct Service Team

JEFF SPENCER
- General Manager
- Dad, mentor, coach
- 24 years
- Liberty Public Schools, Hy-Vee, Garmin, Gardner Edgerton SD, Wellmark Blue Cross, KVC

SHEA BOLLIN
- Mechanic
- Fisherman, Pitmaster, KU Fan
- 14 years
- Inergy Propane, Garmin, Cree, Dimensional Innovations, Hooper Holmes

JARRET SCHMIDT
- Head Coach
- Adoptive dad, coach, tennis family
- 24 years
- Genesis Health Systems, North Kansas City Schools, Unity Point, Hy-Vee, Garmin, ESSDACK

MATT WHEELER
- Mr. Moneyball
- Brady Bunch, Coach, "Philosopher"
- 19 years
- Garmin, Ferrell-gas, North Kansas City Schools, VML, Liberty Public Schools

AMANDA COLLIER
- KU / KSU Grad
- 6 years
- Alpine Banks, City of Leawood, Exline

CANDISE CLARK
- Porter
- 25 years
- CrossFirst, Service Management Group, City of Raymore

EXPERT RESOURCES

MARK VAN BUSKIRK
CHIEF ACTUARY

DR. TIM CHURCH
CHIEF MEDICAL OFFICER

ED OLEKSIAK
VP COMPLIANCE

POLSINELLI
LEGAL

WALLY GOMAA
WELLNESS STRATEGY

TODD WHITTHORNE
DIRECTOR CLINICAL CARE

MARK FITZGIBBONS
COMMUNICATION DIRECTOR

SCOPE OF SERVICES

a. Human Resources Support

- Dedicated, ***Consistent*** Account Team
- On-site service support as needed
- Day-to-Day Resolution of Service Issues
- Monthly, Quarterly and Annual Custom Reporting
- Presentation to and Participation in Board Meetings as requested
- Employee Benefit Communication pieces (Benefit & Company Policy Handbooks, Benefit Statements, Employee Education Materials)
- On-line Enrollment and Eligibility System, Company Intranet Portal
- MyWave™ Technology Portal
- Compliance Assistance (Legislative Updates, Professional Legal Opinion)

b. Annual Plan Due Diligence/Analysis

- Program Marketing (All coverages)
- Plan Design Analysis
- Contribution Strategy Analysis, Design & Employee Communication
- Network Efficiency Audit
- Funding Analysis & Education
- Carrier Performance Guarantee Development, Implementation & Annual Review
- Claims Modeling through Deerwalk Health 360°
- Rx Savings & Formulary Analysis
- Ancillary Coverage Analysis and Product Alternatives
- Voluntary Benefits Analysis and Implementation

c. Health & Wellness

- Develop Long Term Strategy (Creating a Culture of Wellness)
- Employee Education Campaign
- Evaluate/Implement Health Assessments
- Evaluate/Implement Biometric Screenings
- Participant Incentive Analysis
- Proactive Identification of Future Large Claims
- Monitor/Measure Program Return on Investment
- Create Program Year-Over-Year Benchmarks

FORM NO. 6A: "FEE SCHEDULE"
SCHEDULE OF HOURLY BILLING RATES FOR SERVICES

Personnel Classification	Typical Work Tasks	Hourly Billable Rates
		N/A
TOTAL		

Holmes Murphy (HMA) does not provide services based on billable hours. Our practice is built around improving the results for our clients no matter what or how long it takes. We believe that billable hours can be an additional administrative task that can yield non-desirable outcomes while discouraging our customers from accessing our consulting services.

We understand the desire of The City is a non-commission based Per Employee Per Month (PEPM) Fee. We are proposing an alternate fee design that does include commissions built into the BlueKC premium. HMA does maintain a direct "Blue Chip" broker status with BlueKC. We view this designation to be of importance both from relationship and financial standpoints. As a direct "blue chip" broker we have unique insights into the direction of the BlueKC, input relative to process improvements and enhanced access to their management team. From a financial standpoint we receive additional bonus compensation. These bonuses do not directly affect the premium rates paid by our clients and ultimately allow HMA to provide our service at a lower effective cost versus non-"blue chip" competition. The overall result is that our BlueKC clients, benefit financially by leveraging HMA's relationship with BlueKC.

We are proposing the following compensation structure:

- BlueKC Minimum Commission: $58,000 Annually (this translates to $7.18 PEPM)
- Blue Chip Bonus: $9.50 PEPM ($76,722 Annually)

This creates total annual compensation to HMA of $134,722, of which only $58,000 is charged directly to The City. This level of compensation allows us to deliver our complete suite of services and minimizes the financial impact to The City. In the future, if the City moves the insurance coverage from BlueKC, HMA would adjust the overall PEPM rate commensurate with the current compensation (roughly $16.50 PEPM).

Holmes Murphy & Associates	Jeff Spencer
Company Name	Authorized Person (Print)
1828 Walnut Street, Suite 700	
Address	Signature
Kansas City, MO 64108	Sr. Vice President
City/State/Zip	Title
(816)857-7800 (866)501-9322	1/9/2017
Telephone # Fax#	Date
42-0985055	S-Corp
Tax ID No.	Entity Type

FORM NO. 6B:
SERVICE RELATED DIRECT EXPENSES

ITEM	UNIT COST
All Services outlined in the RFP response are included in the Base Fee outlined on Form 6A	N/A

Holmes Murphy & Associates
Company Name

1828 Walnut Street, Suite 700
Address

Kansas City, MO 64108
City/State/Zip

(816)857-7800 (866)501-9322
Telephone # Fax#

42-0985055
Tax ID No.

Jeff Spencer
Authorized Person (Print)

Signature

Sr. Vice President
Title

1/9/2017
Date

S-Corp
Entity Type

14.0 WORK AUTHORIZATION AFFIDAVIT AND E-VERIFY: Any contract for services in excess of five thousand dollars ($5,000), the bidder or business entity, as defined in § 285.530, RSMo, shall, 1. Provide; by sworn affidavit affirming that it does not knowingly employ any person who is an unauthorized alien and 2. Provide documentation affirming its enrollment and participation in a federal work authorization program with respect to the employees working in connection with this contract. The required documentation must be from the federal work authorization program provider. e.g. the electronic signature page from the E-Verify program's Memorandum of Understanding. Letter from Consultants reciting compliance is not sufficient.

The Department of Homeland Security, U.S. Citizenship and Immigration Services, (USCIS) in partnership with the Social Security Administration (SSA) operate an FREE internet-based program called E-Verify, http://www.dhs.gov/everify that allows employers to verify the employment eligibility of their employees, regardless of citizenship. Based on information provided by employees on their Form I-9, E-Verify checks the information electronically against records contained in DHS and Social Security Administration databases. There are penalties for employing an unauthorized alien, including suspension of the Consultant's business license, termination of the contract, debarment from city and State work for a period of three years or permanently, and withholding 25% of the total amount due the Consultant.

All submittals should include the signed and notarized Work Authorization Affidavit AND the electronic signature page from the E-Verify program

CITY OF LEE'S SUMMIT, MISSOURI
WORK AUTHORIZATION AFFIDAVIT PURSUANT TO SECTION 285.530, RSMo
(FOR ALL BIDS FOR SERVICES IN EXCESS OF $5,000.00)
Effective 1/1/2009

County of Johnson)
) ss.
State of Kansas)

My name is Jeff Spencer. I am an authorized agent of Holmes Murphy & Associates ("Bidder"). Bidder is enrolled and participates in a federal work authorization program for all employees working in connection with services provided to the City of Lee's Summit, Missouri. Bidder does not knowingly employ any person who is an unauthorized alien in connection with the services being provided.

Bidder shall not knowingly employ or contract with an illegal alien to perform work for the City of Lee's Summit, Missouri or enter into a contract with a subbidder that knowingly employs or contracts with an illegal alien.

Affiant

Jeff Spencer
Printed Name

Subscribed and sworn to before me this 5th day of January, 2017.

Grete Phillips
Notary Public

SEAL

GRETE PHILLIPS
State of Kansas
My Appt. Exp. 10/14/18

Company ID Number: 223402

To be accepted as a participant in E-Verify, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 888-464-4218.

Employer Holmes Murphy & Associates, Inc.

Kathryn D Eklov	
Name (Please Type or Print)	**Title**
Electronically Signed	06/19/2009
Signature	**Date**

Department of Homeland Security – Verification Division

USCIS Verification Division	
Name (Please Type or Print)	**Title**
Electronically Signed	06/19/2009
Signature	**Date**