

Attachment B

I. Scope of Services to be provided by HRH:

For benefit programs listed in Attachment A, HRH will provide the City of West Allis consulting, actuarial and brokerage services as outlined below:

- A. Strategic Benefit Planning. Assistance in developing overall plan benchmarks and targets to ensure that the plan meets the objectives of the City of West Allis and its employees.
- B. Request for Proposal (RFP). Compiling of information necessary, execution and managing of the RFP process for the specified lines of coverage in Attachment A.
- C. Benefit Design. Assistance in ensuring that benefit design is consistent with the strategic benchmarks and targets set forth in the strategic benefit planning process.
- D. Administration. Assistance in identifying core administrative services, assessing vendor performance and managing vendor relationships to provide appropriate program administration.
- E. Funding. Advise and counsel regarding program funding alternatives, including review of fee proposals, recommending budget rates, employee contribution rates, and COBRA rates, selecting and procuring appropriate stop loss terms and monitoring program costs against expectations.
- F. Communication. Assistance in drafting employee communications regarding benefit program performance and changes, assistance in the review and drafting of plan documents and insurance certificates and both planning and executing the enrollment process.
- G. Claims Utilization Reporting. Provide claims utilization reporting utilizing Decision Master Warehouse, including all of its components on an annual or semi-annual basis.
- H. Compliance Tools & Legislative Information. Provide informational materials on legislative developments impacting employee benefit plans, including access to online reference tools on FMLA, COBRA, HIPAA, and Section 125 plans.
- I. Meetings with the City of West Allis and Vendors. Attending and facilitating regular meetings with the City of West Allis and vendors as needed to facilitate program management including day-to-day operations and planning program changes.

On a quarterly basis, HRH shall meet with the City of West Allis to review all activities performed by HRH during the prior quarter. The meetings will include business concerns, with options and recommendations (Labor/Management meetings).

- J. Day-to-Day Administrative Issues. Providing assistance in the daily administration of programs, including resolution of vendor service issues and addressing questions and concerns raised by employees and management.
- K. Wellness Services.
- Data analysis and needs assessment utilizing Decision Master Warehouse.
 - Assistance in creating a targeted business plan.
 - Support for the implementation of the business plan through HRH communication resources.
 - Assistance in evaluation of wellness efforts.

The following Services are specifically excluded from the fees described in Attachment A unless otherwise noted:

- Comprehensive claims audits.
- Actuarial valuations (e.g., FAS 106, FAS 112, GASB 45, etc.).
- Comprehensive communications projects (drafting, graphic design, production, distribution, etc.).

The above excluded services are available from HRH and can be provided on a separate project fee basis.