AGENDA ITEM
CA46

AGENDA PLACEMENT FORM

Send to: ccagenda@johnsoncountytx.org

Date: 7.1.2026

Meeting Date: 7.13.2026

Submitted By: Alissa Krokum

Department:

Signature of Elected Official/Department Head:

Purchasing Department

Court Decision:
This section to be completed by County Judge's Office



7.13.2026

Description:

Consider and approve with authorization for County Judge to sign Consulting Scope of Work contract for RFP 2026-301 Insurance Consultant for Johnson County with awarded Holmes and Murphy

(May attach additional sheets if necessary)

Person to Present: Lance Anderson

(Presenter must be present for the item unless the item is on the Consent Agenda)

Supporting Documentation: (check one) ☑ PUBLIC ☐ CONFIDENTIAL

(PUBLIC documentation may be made available to the public prior to the Meeting)

Estimated Length of Presentation: 5 minutes

Session Requested: (check one)

☑ Action Item ☐ Consent ☐ Workshop ☐ Executive ☐ Public Announcement

Check All Departments That Have Been Notified:

☑ County Attorney ☐ IT ☐ Purchasing ☐ Auditor

☑ Personnel ☐ Development Services ☐ Facilities Management

Other Department/Official (list)

Please List All External Persons Who Need a Copy of Signed Documents In Your Submission Email

Approved in CC on 9/11/2023

There's No Place Like Holmes.

Johnson County

CONSULTING SCOPE OF SERVICES 2026

HOLMES MURPHY.

INNOVATIVE CAPTIVE STRATEGIES | BrokerTech Ventures | ACAP HealthWorks | CREATIVE RISK SOLUTIONS | avant | GCM | Innovative PROGRAM SOLUTIONS

HEALTH AND WELFARE BENEFITS CONSULTING

Holmes Murphy & Associates (Holmes Murphy) is pleased to provide Health and Welfare Benefit Consulting Services for Johnson County . The following agreement outlines the scope of health and welfare benefit brokerage and consulting services to be provided by Holmes Murphy Johnson County . This Scope of Services includes support for the following benefit plans and programs:

• Medical	• Clinical Wellbeing	• COBRA Vendor Support
• Dental	• Basic Life/AD&D	• Short Term Disability
• Pharmacy	• Voluntary Life/AD&D	• Long Term Disability
• Vision	• Spending Accounts	• Worksite Products

Each service described below will be provided by your Holmes Murphy Client Experience Team for the benefit programs to which we are appointed. Our Client Experience Team consists of day-to-day client management members, supplemented with subject matter experts in financial reporting, compliance, employee communication, and clinical consulting as well as geographic executive sponsors. Note that based on client specific plans and strategies, not all services are included every year.

CONSULTING SERVICES

Your Holmes Murphy Client Experience Team will develop a strategic plan for both immediate and long-term approaches to optimize benefits and mitigate health care cost trends. This includes the following services:

- Develop an annual set of milestones/project plans and deliverables based upon the scope of service offered.
- Provide guidance on all aspects of the employee benefit portfolio including plan design and contribution strategies.
- Conduct semi-annual strategic meetings.
- Facilitate pre-renewal strategic meetings to discuss objectives, expected financial impacts, and desired outcomes.
- Manage and oversee day-to-day interactions with client's vendor partners.
- Provide HR team support for management of benefit plans and programs.
    - Provide nationally validated sources for benchmarking related to health and ancillary benefit plans.

- Provide general education and consulting on international benefit strategies. *Specific client marketing projects are not included in our core scope of services.*

MARKETING SERVICES

While consulting on market trends, your Holmes Murphy Client Experience Team will represent you to various insurance carriers, third party administrators, benefit vendor partners, etc. based upon your employee benefit portfolio goals. The following services are included:

- Facilitate the Request for Proposal (RFP) process requesting proposals, pricing, and specific benefit detail for insurance products to which we are appointed. In scope marketing services encompass general insurance products and administration of insurance products only. Marketing for PBM services and BenAdmin/HRIS solutions are deemed out of scope, and an additional fee may be assessed for these services.
- Evaluate provider networks, which may include provider discounts, access points, service levels, data capabilities, and other client-specific metrics.
- Conduct vendor negotiations and oversee finalist presentations.
- Perform a non-legal review of carrier Summary Plan Descriptions (SPD), Summary of Benefit Coverages (SBC), and other third-party administrator certificates for accuracy and consistency with terms of coverage sold/renewal terms.

EMPLOYEE COMMUNICATION SERVICES

Employee engagement and communication is a critical component of the success of any benefit program. In collaboration with our client experience team and your team, our designated communications consultant will develop a short- and long-term employee communication strategy using various digital methods to educate and engage employees. Our strategic approach strongly considers your organizational engagement goals and employee demographics. The support our team will provide, included in our scope of service, contains:

- Tailored benefit enrollment communication planning (project management, communication calendar, timeline, etc.).
- Preparation and facilitation of virtual Open Enrollment meetings or recorded webinar. *If in-person or virtual meetings are requested, a minimum of 25 participants is requested, and an additional fee may apply.*
- Creation of Benefit Enrollment materials* for effective employee communication. Examples of deliverables available include Benefit Enrollment Guide, Benefit Webpage, Benefit Video Library in English & Spanish, home mailers, and more.

- Evaluation of communication tools and materials included in carrier contracts, such as plan selection tools, wellness newsletters, etc.
- Creation, reporting, and assistance with feedback strategies of engagement surveys.

**To meet deadlines, a maximum of three rounds of edits for each deliverable is required. If additional iterations are needed, a fee will apply.*
**Translation, printing, postage & fulfillment delivery fees will apply.*

COMPLIANCE SERVICES

The Client Experience Team will provide expertise and awareness on matters related to state and federal health and benefit plan compliance.

- Generate a proprietary Compliance Scorecard, which provides insight into areas that may need further attention.
- Develop a plan of action to address any Compliance Scorecard items of concern.
- Provide access to in-house compliance resources for routine benefit questions and inquiries.
- Provide on-going webinar and in-person educational opportunities.
- Provide access to an online benefits and human resources portal (Holmes Murphy HR Toolbox) containing compliance tools and resources.
- Provide timely updates on compliance-related alerts via email.
- Prepare compliance required notices in electronic format.
- Recommend vendor partners that facilitate compliance-related administration such Leave of Absence administration, and ACA (Affordable Care Act) requirements. The costs of these vendor services are not included in our scope of services.

FINANCIAL & ACTUARIAL SERVICES

As part of the core services provided, the Client Experience Team will provide insight into the performance of the benefit portfolio. Below are the services included:

- On a monthly basis, collect carrier and vendor partner claims, utilization, and cost data to provide financial reporting and analysis.
- Prepare routine evaluations of the financial performance of benefit programs for which Holmes Murphy has been appointed.
- Develop benefit budgets using Holmes Murphy's proprietary and actuarially validated budget modeling tools, including an analysis of contribution strategies and plan design strategies.

- Assist in evaluating and preparing Incurred But Not Reported (IBNR) reserve analysis on an annual basis.
- Analyze risk levels and provide stop loss modeling when appropriate.
- CLUE Reporting: Performance Summary, Key Indicators, Claims Modeling, Claims Analysis and AdHoc financial data analysis support.

PHARMACY STRATEGY CONSULTING

The pharmaceutical industry continues to evolve, and specialty medication costs continue to rise. As part of our scope of services, Holmes Murphy assists our clients in these areas:

- Facilitate the procurement of Pharmacy Benefit Management services. In scope marketing includes evaluation of carved-out arrangements, preferred coalitions, or preferred carved-in contracts. Discount card optimization procurements are deemed out of scope, and an additional fee may be assessed for these services. Fees will be built into the procurement and paid for by the winning vendor.
- Perform financial stewardship evaluation of Pharmacy Benefit Manager including annual market check and pricing reconciliation validation.
- Evaluate prescription drug program design utilizing plan design benchmarking, high-cost low value drug, and trend reporting analyses. Network optimization analysis is deemed out of scope, and an additional fee may be assessed for these services.
- Recommending and assisting with managing an audit vendor that will conduct an audit of financials, rebates, and benefit plan designs is deemed out of scope, and an additional fee may be assessed for this service.

CLINICAL WELLBEING SERVICES

Holmes Murphy sees immense value in clinical health improvement and wellbeing strategies that can help care for each employee. These clinical/wellbeing services are included in our scope:

- Provide Clinical Wellbeing strategy, design and measurement including evaluation, implementation, and management of clinical and wellbeing solutions to meet benefit portfolio goals.
- CLUE Population Health Reporting & Analysis utilizing data warehouse insights along with custom client reports including disease-specific, preventive & primary, generation, etc.
- Manage and oversee day-to-day interactions with client's clinical and wellbeing vendor partners.

Note: Clinical Wellbeing services cover a multitude of topics including: Cancer Care; Cardiovascular; Caregiving; Centers of Excellence; Diabetes; Family Forming Services; Health Navigation & Advocacy; Mental

Health; Musculoskeletal; Onsite Clinics; Primary Care & Screenings; Weight Management; Wellbeing Technology; Women's Health and more.

ADDITIONAL SERVICES NOT INCLUDED IN SCOPE

Additional Services are available either through Holmes Murphy or a third party at an additional cost. For an estimated cost of each additional service, please speak with your Holmes Murphy Client Experience Team.

Some of the services are outside of our core scope include:

- Language translation, printing, postage, and document delivery expenses.
- Custom employee communication materials including custom videos, benefit apps, campaign promotional items, engagement surveys, etc.
- One-on-one employee Open Enrollment meetings.
- Plan document and SPD creation.
- Compliance-related deliverables such as:
  - Non-discrimination testing.
  - ACA Section 6055 and 6056 reporting.
  - COBRA administration.
- FAS 106/OPEB calculation.
- Medicare Part D actuarial attestation and notification.
- Benefit administration or other benefit technology evaluations and implementations.
- Benefit eligibility management (including carrier portal management).
- Partner/vendor file feed charges.
- Employee compensation/total reward statements.
- Custom vendor ROI analysis.
- Client specific international benefit marketing/consulting projects.

SERVICES FEES

Compensation for the services outlined in the Scope of Services will be invoiced to Johnson County no more frequently than monthly. Total compensation under this Agreement for such services shall not exceed $55,000 annually. This fee shall remain unchanged throughout the five-year term of the Agreement.

Notwithstanding any provision contained in this Agreement; at any time following the expiration of 365 DAYS after the execution of the Agreement, Johnson County may terminate the Agreement at its discretion, without charges for unutilized term, or penalty of any kind, by giving Holmes Murphy 90 days written notice of such termination. This provision shall not be deemed to conflict with any other provision allowing Johnson County to terminate the contract upon a shorter or lesser notice.

Compensation related to non-medical and non-dental benefit coverages may be paid directly to Holmes Murphy by applicable vendors, where available. In addition, Holmes Murphy may receive national carrier bonus payments based on aggregate national volume and performance metrics. Such payments are not attributable to the County's account and are used to support corporate initiatives.

Upon termination of this Agreement, the County shall not incur any further monthly service fees, except for fees earned and invoiced for services rendered prior to the effective date of termination.

APPROVED AS TO FORM AND CONTENT:

JOHNSON COUNTY:

Christopher Boedeker
As Johnson County Judge

7-13-24
Date

Attest: April Long
County Clerk, Johnson County

7-13-24
Date

Holmes Murphy:

Authorized Representative

7/1/2026
Date

Printed Name: Julie Rickman

Title: AVP