

**SIGNATURE PAGE**

**P-18-2024**

To the Monmouth County Board of County Commissioners:

**THE UNDERSIGNED HEREBY DECLARES THAT  
I (WE) HAVE CAREFULLY EXAMINED THE SPECIFICATIONS.  
I (WE) HEREBY CERTIFY PRICES QUOTED ARE IN ACCORDANCE  
WITH YOUR REQUIREMENTS.**

Company Name: Alliant Insurance Services, Inc.  
(PRINT)

Preparer's Name: Craig Harper  
(PRINT)

Signature: Craig Harper  
(DATE)

Address: 1285 Drummers Lane, Suite 305  
Wayne, Pennsylvania 19087

Telephone No.: (267) 325-8425

Fax No.: \_\_\_\_\_

E-Mail Address: Craig.Harper@Alliant.com  
**\*\*\* (This should be the email where Contracts would be sent) \*\*\***

Contact Person: Craig Harper

FEIN: \_\_\_\_\_  
(Federal Employee ID)

BRC: \_\_\_\_\_  
(Business Registration Certificate)

(Revised 2/2017)

## 7. Price Proposal

Alliant will work on a consulting fee basis. Our expectation is that the overall total cost of risk for the County of Monmouth will be reduced by an amount greater than our annual fee.

### 1. Employee Benefits Consulting: Flat Fee for Service

The following chart illustrates annual proposed fee(s):

Comprehensive Employee Benefits Consulting Services	Fee for Service
<ol style="list-style-type: none"> <li>1. Strategic Benefit Consulting               <ol style="list-style-type: none"> <li>a. Annual benefit objective setting.</li> <li>b. Work Plan Development.</li> <li>c. Gap Analysis</li> <li>d. Analysis of financial/non-financial performance of benefit plans.</li> <li>e. Legislative updates and their impact on County plans.</li> <li>f. Introduction of new and progressive benefit concepts.</li> <li>g. Miscellaneous e-publications on employee benefit trends and compliance issues.</li> <li>h. Development &amp; management of new vendor implementation plan.</li> <li>i. Assist with internal management systems to simplify program administration.</li> <li>j. Regular evaluation of service providers.</li> <li>k. Resolve problems relating to vendor performance.</li> <li>l. Federal and State regulatory updates.</li> <li>m. HIPPA privacy rule compliance.                   <ol style="list-style-type: none"> <li>1. Review and recommendations with respect to plan set up and HIPPA compliance strategy.</li> <li>2. Sample policies and procedures.</li> <li>3. Sample authorizations.</li> </ol> </li> <li>n. Patient Protection and Affordable Care Act.                   <ol style="list-style-type: none"> <li>1. Strategic Planning.</li> <li>2. Education on compliance requirements by year.</li> <li>3. Counseling on compliance strategy.</li> <li>4. Updates on newly issued guidelines and employer impact.</li> <li>5. Development of standard notices for required employee communications.</li> <li>6. Documentation of ACA compliance status.</li> </ol> </li> <li>o. Document review.                   <ol style="list-style-type: none"> <li>1. Review plan documents and amendments for compliance with employer specifications.</li> <li>2. Review SPD's and amendments.</li> <li>3. Review insurance contracts and agreement.</li> <li>4. Coordinate amendments.</li> <li>5. Suggest and negotiate alternative language, as required.</li> </ol> </li> <li>p. Financial underwriting services.                   <ol style="list-style-type: none"> <li>1. Underwriting workups and negotiation.</li> <li>2. Pricing and plan changes.</li> <li>3. Pricing and recommendations on stop loss levels.</li> </ol> </li> </ol> </li> </ol>	\$50,000 annually

<ul style="list-style-type: none"> <li>4. Development of premium equivalents.</li> <li>5. Development of COBRA equivalents.</li> <li>6. Claim and fixed cost projections.</li> <li>7. IBNR projections.</li> <li>8. Budget development.</li> <li>9. Health Savings Account Analysis</li> </ul>	
<p><b>2. Annual Renewal Report &amp; Financial Analysis</b></p> <ul style="list-style-type: none"> <li>a. Pre-renewal planning meeting to review prior year activities, discuss benefit trends, decision on any market review and set annual initiatives.</li> <li>b. Development of renewal report, including forecast analysis, analysis of both fully insured and self-insured funding, cost management results, employee contributions, plan design options, results of market review if elected, mandatory plan changes, discretionary plan changes, ACA fee impact, premium and COBRA rates.</li> <li>c. Benefit analysis and plan design modeling.</li> <li>d. Employee contribution strategy development and cost modeling including adoption of income based contribution models.</li> <li>e. Vendor selection &amp; insurance marketing analysis</li> <li>f. Evaluation of contract terms and conditions.</li> <li>g. Premium rate and service fee negotiation.</li> <li>h. Plan cost/claim pattern trending, including analysis relative to targeted benchmarking indices.</li> <li>i. Annual final accounting.</li> </ul>	

Pharmacy Consulting Services	Fee for Service
<p><b>I. ESI Financial Discount and Rebate Reconciliation Review</b></p> <ul style="list-style-type: none"> <li>a. Request ESI claims data</li> <li>b. Review claims experience discounts to contractual discount guarantees.</li> <li>c. Review rebate guarantee experience to contractual rebate guarantees.</li> <li>d. If material discrepancies exist, request reimbursement from ESI.</li> <li>e. Review current programs and clinical edits and provide recommendations.</li> </ul>	\$5,000
<p><b>III. Ongoing Pharmacy Consulting Support (12/1/2023 – 11/30/2024)</b></p> <ul style="list-style-type: none"> <li>f. Ongoing participation in all invited monthly calls with PBM to answer any questions and provide our opinions and recommendations.</li> <li>g. Regularly recurring calls with County of Monmouth and Alliant to discuss current issues or new strategies on an ongoing basis.</li> <li>h. Development, analysis and implementation of additional Pharmacy Savings Strategies and other new opportunities as they emerge.</li> <li>i. Coordination of an annual Strategy Meeting related to the Pharmacy Benefit</li> </ul>	\$45,000

### Optional Services

<p><b>1. Absence Management Services</b></p> <ul style="list-style-type: none"> <li>a. Opportunity assessment on current administrative process.</li> <li>b. Complete policy review.</li> <li>c. Manager surveys.</li> <li>d. Foundational interviews.</li> <li>e. Data review</li> <li>f. Benchmarking.</li> <li>g. ROI analysis.</li> <li>h. Financial opportunity metrics.</li> <li>i. Policy development.</li> <li>j. Training</li> <li>k. Implementation.</li> </ul>	<p>\$55,000 for project</p>
<p><b>2. Employee Communications</b></p> <ul style="list-style-type: none"> <li>a. Develop communications strategy.</li> <li>b. Develop benefit overview brochure.</li> <li>c. Open Enrollment. <ul style="list-style-type: none"> <li>1. Development of Open Enrollment communication.</li> <li>2. Development of employee meeting materials.</li> <li>3. Coordination of vendors – supplies and attendance.</li> <li>4. Sample announcement to COBRA participants.</li> <li>5. Attend and lead open enrollment meetings.</li> <li>6. Access to Ben-IQ mobile benefits app.</li> <li>7. Benefit program branding.</li> <li>8. Open enrollment campaigns.</li> <li>9. Custom designed brochures.</li> <li>10. Total compensation statements.</li> <li>11. Custom employee newsletters.</li> </ul> </li> </ul>	<p>\$10,000 annually</p>
<p><b>3. Wellness Services</b></p> <ul style="list-style-type: none"> <li>a. Education of HR and executive teams on the importance of wellness.</li> <li>b. Support design and development of program scope.</li> <li>c. Develop custom wellness program vision, strategic goals &amp; annual objectives.</li> <li>d. Develop a customized multiyear plan with an annual program calendar.</li> <li>e. Evaluate and integrate carrier (or outside wellness vendor) wellness services into existing program, as appropriate.</li> <li>f. Development of incentive management strategy and roll out.</li> </ul>	<p>\$10,000 annually</p>
<p><b>4. IDAP Analytics and decision support tools</b></p>	<p>\$50 Per Employee Per Month</p>
<p><b>5. Prescription Drug Coalition</b></p>	<p>No charge</p>
<p><b>6. Stop Loss Coalition</b></p>	<p>No Charge</p>

Please note that we would be pleased to review this draft statement of work in more detail to ensure that it incorporates all services required by The County of Monmouth.