



# Proposal for City of Burleson

## Scope of Work: Total Compensation Statements

### March 31, 2022

**Prepared For:**

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**Prepared By:**

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## About HUB International HR Consulting Services

For over two decades, HUB HR Consulting Services has delivered outstanding results for our clients, focusing on human resources (HR), payroll and benefits administration with unmatched subject matter and technological expertise. Our clients leverage that expertise every day to improve their human resource information system (HRIS) performance and lower their costs. We serve our clients in the areas of HRIS analysis, project management, change management and production of Total Compensation Statements.

## About HUB International

*Ranked among the top ten insurance brokerages worldwide, Hub International (Hub) is renowned for its commitment to providing in-depth, strategic consulting and tailored client service.*

### **OUR DIFFERENT APPROACH FOSTERS LONG-TERM PARTNERSHIPS WITH OUR CLIENTS.**

HUB International consultants' genuine dedication to quality performance allows us to cater to our clients' needs on an exclusive and personalized basis. We offer practical solutions specifically tailored to address your needs, and we look to establish a relationship based on the high quality of the services we provide, mutual respect and trust.

We start by getting to know your business objectives and practices very well. Only then do we recommend the hands-down best ways to align your practices with your strategic business objectives, increase your employees' motivation, improve productivity and ultimately enhance your profitability.

### **Our areas of expertise**

- Human Capital Consulting
- Global Health and Benefits Consulting
- Communication and Design
- Human Resource Information Services Consulting
- International Total Rewards Consulting
- Property and Casualty
- Non-Profit and Public Affairs Consulting



## Project Overview

HUB International and City of Burleson, herein referred to as "Client," have mutually agreed to the following services: HUB International will create approximately 350 total compensation statements (TCS). This project is to be completed during 2022 with an estimated June delivery date for TCS.

## Project Details

### Included Project Deliverables

- HUB International will develop a timeline with milestone dates for production of TCS (typically 6-8 weeks)
- HUB International will assist with determining benefits and pay types to be shown on TCS if assistance is desired
- HUB International will share best practice recommendations for TCS setup if desired
- HUB International will complete TCS template setup
- HUB International will load Client data files into HUB International database
- HUB International will provide proofreader review of the final sample TCS (Client is responsible for final review of TCS text and data that appear on TCS)
- HUB International will produce and provide test TCS in PDF format
- HUB International may provide historical (NOT future projected) data extraction services from Client legacy system if platform is familiar to HUB International and extract service is purchased by Client
- If printed TCS are purchased:
  - HUB International will provide a hard copy proof of final sample TCS for review and approval before final production
  - HUB International will print final TCS on 80# gloss cover paper unless another paper stock is agreed upon prior to TCS fulfillment
  - HUB International will stuff printed TCS into 9 x 11.5" (approximate size) security window envelopes with company logo, employee address, and quality control check number showing through security window
  - HUB International will conduct a quality control check of printed TCS
  - HUB International will drop ship printed TCS to a single location or direct mail to employee addresses
- If electronic PDF TCS are purchased
  - HUB International will provide all TCS in PDF format via secure FTP (file transfer protocol)
- HUB International will provide secure FTP or secure email for the transmission of data files and test TCS

## Project Assumptions

Client will provide the following:

- A single point of contact through which all requests and communications will be made to HUB International
  - It is assumed that this contact has permissions to see all TCS data
- Company artwork per Client's selected TCS format, e-signature and company logos
- The data for these TCS in the file specifications provided below:



- Final data and TCS text review and approval
- Approval to ship printed TCS or to deliver final TCS in PDF format

All statements will be produced in English using US currency

## Estimated Annual Cost Summary

Total Compensation Statements: 1- or 2-page PDF format only (no print)	Price
Up to 350 TCS (flat fee)	\$2,275.00
<b>Year-1 Setup Fee</b>	
(Includes one setup. If client has multiple company setups, including different logos, color schemes or statement text, additional cost may be incurred. The additional cost will be discussed with client prior to proceeding with work.)	\$750.00
<b>Postage (mailing of statements and proofs)</b>	
(If direct mailing to employees, USPS first class mailing is \$1.55 per piece mailed plus mailing of proofs at \$20.00 per proof mailed via USPS priority mail. Rate per piece mailed subject to change based on USPS rate at time of mailing.	N/A
If drop shipping to location(s), UPS cost plus \$25 per location shipped to plus mailing of proofs at \$20.00 per proof mailed via USPS priority mail.)	
<b>Total Estimated Cost</b>	<b>\$3,025.00</b>
(Additional statements will be billed at a rate of \$6.50/statement plus postage if applicable.)	

TCS will be produced one time annually in the chosen standard format. Customized formats are also available and are billed separately at our standard rate of \$225 per hour. If customizations are determined to be needed, an estimate will be provided before proceeding with custom work.

Data that is not provided in the exact layout provided on Page 4 (ClientDataFiles.xls) may require HUB International to manipulate the data. Time spent on data manipulation shall be billed additionally at our standard rate of \$225 per hour.

Adjustments of any kind that are requested after final TCS approval from client shall be subject to billing at our standard rate of \$225 per hour. Client shall be solely responsible for any additional printing, time (at our standard rate of \$225 per hour) and materials costs that result from errors of any kind that are attributable to the responsibilities of Client. HUB International is not responsible for any errors in data provided by Client to HUB International or data extracted by HUB International and reviewed by client.

The above estimate is valid until the date of 4/30/2022. After this date, pricing and terms are subject to change.



## Terms and Conditions

**Contract Length:** The term of this Agreement shall begin on the date that this Agreement is signed and shall terminate upon the earlier of successful completion of the project or December 31, 2022.

**Project Completion:** The TCS project shall end upon the earlier of project completion (just after TCS mailing date or TCS PDF delivery date) or December 31<sup>st</sup> of the calendar year in which the project is scheduled to be completed.

**Payment Terms:** Fifty percent (50%) of the estimated project cost is due upon the execution of this agreement and is non-refundable. Client will be invoiced for the remaining yearly balance upon project completion. Invoicing will occur immediately after each identified phase and are payable no later than thirty (30) days after receipt of invoice.

**Termination Terms:**

*Termination without Cause.* Client shall have the right to terminate this agreement in whole or in part at any time on sixty (60) days' written notice to HUB International. Upon receipt or giving of notice of termination, HUB International shall take no further action except as directed by Client in accordance with the termination notice.

HUB International's remedies for termination without cause under this Section upon termination by Client shall be (i) payment in full pursuant to the prices set forth in this statement of work for the term in which termination occurs and (ii) payment in full of any agreed upon customizations pursuant to this statement of work or any other documented approval.

*Termination for Cause.* Either party may terminate this Agreement as of the date specified in a notice of termination if the other party materially breaches its obligations under this Agreement and does not cure that breach within 30 days after receiving notice of such breach.

**Limitation of Liability:**

While HUB International makes every effort to avoid errors or other mistakes in TCS, including utilizing the services of a proofreader, approval of final designs and content shall be Client's sole responsibility. As such, HUB International shall have no liability for and not be responsible for any errors or other mistakes, including without limitation, additional printing and mailing costs for errors discovered after client approves final designs and content.

Should issues be found with the TCS printing and fulfillment process or online hosting of TCS, HUB International liability shall be limited to the correction, and shipping costs if applicable, of TCS found to be affected.

HUB International shall have no liability for and not be responsible for any errors from the actions of a third-party delivery service such as USPS, FedEx, or UPS.

## Confidential Information

- (a) **Acknowledgment of Confidentiality.** Each party hereby acknowledges that it may be exposed to confidential and proprietary information of the other party including, without limitation, Custom Work Product, Embedded Software and other technical information (including functional and technical specifications, designs, drawings, analysis, research, processes, computer programs, methods, ideas, “know how” and the like), business information (sales and marketing research, materials, plans, accounting and financial information, personnel records and the like) and other information designated as confidential expressly or by the circumstances in which it is provided (“Confidential Information”). Confidential Information does not include (i) information already known or independently developed by the recipient; (ii) information in the public domain through no wrongful act of the recipient, or (iii) information received by the recipient from a third party who was free to disclose it.
- (b) **Covenant Not to Disclose.** With respect to the other party’s Confidential Information, the recipient hereby agrees that during the Term and at all times thereafter it shall not use, commercialize or disclose such Confidential Information to any person or entity, except to its own employees or consultants having a “need to know” (and who are themselves bound by similar nondisclosure restrictions), and to such other recipients as the other party may approve in writing; provided, that all such recipients shall have first executed a confidentiality agreement in a form acceptable to the owner of such information. Neither party nor any recipient may alter or remove from any software or associated documentation owned or provided by the other party any proprietary, copyright, trademark or trade secret legend. Each party shall use at least the same degree of care, which must be a reasonable degree of care, in safeguarding the other party’s Confidential Information as it uses in safeguarding its own confidential information.



## Proposal Acceptance

Thank you very much for considering HUB International for the production of your Total Compensation Statements. Please sign below if you accept the terms of this engagement.

### Client Acceptance:

Signature: Justin Schamhorst Date: 4/18

Print Name: Justin Schamhorst Title: Purchasing Manager

Contact Name for invoicing: Erin Walker

Email address for invoicing: Finance@burleson.tx.com

Company: City of Burleson

### HUB International Acceptance:

Signature: Chad Wagner Date: 4/18/2022

Print Name: Chad Wagner Title: Director of Total Compensation Statements

Company: HUB International

We appreciate the opportunity to extend our service offering to City of Burleson.

Thank you,

Chad Wagner, Director of Total Compensation Statements  
HUB International

Note: Upon signing, please scan and return to Chad Wagner at [chad.wagner@HUBInternational.com](mailto:chad.wagner@HUBInternational.com)