

APPENDIX C

Statement of Work

This Statement of Work (“SOW”) is provided pursuant to the Consulting Agreement dated May 1, 2024 (the “Agreement”) by and between City of Stephenville (“Company”) and HUB International Texas, Inc. (Consultant).

1.0 DESCRIPTION OF SERVICES AND DELIVERABLES

1.1 Annual Consulting Services provided by HUB to Company include the following:

- ✓ Develop a mutually agreeable renewal action plan and timeline that meets Company objectives each year for open enrollment.
- ✓ Prepare and issue a request for proposal (RFP) on Company’s behalf to be sent to major insurance carriers in the market prior to annual open enrollment, unless otherwise instructed by Company.
- ✓ Make recommendations & assist with employee benefit design, funding options, and strategy.
- ✓ As appropriate, Consultant will conduct employee education meetings at open enrollment.
- ✓ Provide customized printed and electronic educational materials to aid in the employee education effort.
- ✓ Assist Company with administrative changes, carrier selection, and implementation during the normal course of open enrollment.
- ✓ Assist with setting up any electronic feeds for Company vendors and provide solutions for customized enrollment solutions when applicable.
- ✓ Advise Company with respect to available technology platforms to support delivery and administration of employee benefit plans.
- ✓ Provide Company with access to proprietary Human Resources tools & resources through strategic partnerships.
- ✓ Provide assistance with claim issues, appeals, provider negotiations, and other related services for the benefit of Company’s employees.
- ✓ Wellness Consulting services to align with and engage your Employee Benefits program.
- ✓ Conduct strategic planning meetings with the Company to review & discuss plan performance, goals, objectives and responsibilities outlined above.
- ✓ Assist with vendor management and administration issues.
- ✓ Provide informational materials on legislative & compliance developments including ongoing compliance consulting and support.
- ✓ Medicare educational support, supplement placement & assistance for employees & dependents nearing or past Medicare eligibility ages.

2.0 TERM

This SOW shall be in effect from May 1, 2024 through April 30, 2028 or if shorter the date of termination of the Agreement, unless renewed in accordance with Section 2.2 of the Agreement or earlier terminated pursuant to Section 2.0 of the Agreement.

3.0 PRICING/FEEES and DISCLOSURES

- 3.1 Company acknowledges that it has received, read and understands the Disclosure Statement — Service Fees, Consulting Fees and Reimbursements (Appendix B of the Agreement) which has been provided to it in connection with this SOW.
- 3.2 Refer to Appendix B of the Agreement (the Disclosure Statement) for pricing and fees detail.
- 3.3 Company acknowledges this SOW shall continue in full force and effect after amendments or modifications to the Agreement or any other Appendix, exhibit, or attachment thereto, unless otherwise modified in writing and signed by Company and Consultant.

- 3.4 Intermediaries Disclosure: Consultant may utilize the services of other intermediaries to assist in the marketing or servicing of Company's benefits program, when in Consultant's professional judgement those services are necessary or appropriate. Such intermediaries may be affiliates of Consultant or not related to Consultant.
- 3.5 Stop Loss Disclosure: Consultant does not make any representations about an insurer's or managing general underwriter's payment or claims denial practices. Consultant will assist with any stop loss claims to help facilitate timely reimbursements, but cannot warrant in any way that all claims submitted to stop loss carriers will be approved and ultimately reimbursed due to variables out of our control (eligibility, exclusions, etc.).

4.0 COMPANY COOPERATION

Company shall fully cooperate with Consultant in the course of Consultant's performance of the Services set forth in Section 1.0 of this SOW, and provide Consultant timely access to Company's information systems along with those elements of information and data necessary to the provisions of the Services. Company will promptly comply with all reasonable instructions and requests made by Consultant and will at all times keep Consultant informed of its representatives' location, business address and telephone number, if any, and any and all other addresses, telephone numbers, email addresses, and telefax numbers where Company may be contacted. Company understands that the timely provision of information by Company is essential to Consultant's performance of its services under this Agreement as employee benefit plans may be date sensitive. Finally, Company understands and agrees that Consultant may not be able to meet certain required timelines in connection with this SOW if Company does not promptly respond to Consultant's requests and inquiries, and Consultant will have no liability or responsibility for delays caused by Company or Company's clients or vendors.

IN WITNESS WHEREOF, the parties hereto have executed this SOW as of the date set forth above.

CONSULTANT:

HUB INTERNATIONAL TEXAS, INC.

By: _____

Name: Rodney K. Dryden

Title: Senior Vice President

COMPANY:

City of Stephenville

By: _____

Name: Jason King

Title: City Manager