

Mercer SOW - revision

Midyear revision to better reflect the current enrollment within the plans offered by the Trust.

Original signed in June 2015 - \$25,000 for consultant Meetings (*preparation for and attendance at Trust meetings, participate in medical carrier annual or bi-annual cost and utilization meetings and project management*) was on a cost basis.

Revised December 2015 - \$25,000 will be covered by commissions received by Mercer from the carriers.

2014-2015 Estimated Budget	2014-2015 YTD Actual through April (10 months)	Core Consulting Services	2015-2016 Estimated Budget
\$35,000	\$93,212 actual charges	General Administration: <ul style="list-style-type: none"> <li>• District questions</li> <li>• Benefit Clarifications</li> <li>• Carrier Follow-up</li> <li>• Appeal Research</li> <li>• Problem Resolution</li> <li>• Monitor Performance Guarantees</li> </ul>	\$35,000
\$30,000 (covered by commis- sions)	\$30,975 commissions received	Renewals/Carrier Relations: <ul style="list-style-type: none"> <li>• Evaluate Cost Containment</li> <li>• Negotiate Preferred Rates and Contract Terms</li> <li>• Renewal Rate Analysis</li> <li>• Create Renewal Report</li> </ul>	\$30,000 (covered by commis- sions)
\$25,000	Included in actual charges above	Consultant Meetings: <ul style="list-style-type: none"> <li>• Preparation for and Attendance at Trust Meetings</li> <li>• Participate in medical carrier annual or bi-annual cost and utilization meetings</li> <li>• Project Management</li> </ul>	\$25,000
\$25,000	Included in actual charges above	Financial Services: <ul style="list-style-type: none"> <li>• Benefit Cost Impact</li> <li>• Cost and Contribution Calculations</li> <li>• Prepare Premium and COBRA Rate Calculations</li> <li>• Prepare and provide regular experience reporting for insured medical and vision plans</li> </ul>	\$25,000
\$10,000 (covered by commis- sions)	Included in commissions received above	Plan Review: <ul style="list-style-type: none"> <li>• Contract Review</li> <li>• Benefit Summary Review</li> <li>• Compliance Reviews</li> </ul>	\$10,000 (covered by commis- sions)
<b>\$125,000</b>	<b>\$124,187</b>	<b>Total</b>	<b>\$125,000</b>

2014-2015 Estimated Budget	2014-2015 YTD Actual through April (10 months)	Core Consulting Services	2015-2016 Estimated Budget
\$35,000	\$93,212 actual charges	General Administration: <ul style="list-style-type: none"> <li>• District questions</li> <li>• Benefit Clarifications</li> <li>• Carrier Follow-up</li> <li>• Appeal Research</li> <li>• Problem Resolution</li> <li>• Monitor Performance Guarantees</li> </ul>	\$35,000
\$30,000 (covered by commis- sions)	\$30,975 commissions received	Renewals/Carrier Relations: <ul style="list-style-type: none"> <li>• Evaluate Cost Containment</li> <li>• Negotiate Preferred Rates and Contract Terms</li> <li>• Renewal Rate Analysis</li> <li>• Create Renewal Report</li> </ul>	\$30,000 (covered by commis- sions)
\$25,000	Included in actual charges above	Consultant Meetings: <ul style="list-style-type: none"> <li>• Preparation for and Attendance at Trust Meetings</li> <li>• Participate in medical carrier annual or bi-annual cost and utilization meetings</li> <li>• Project Management</li> </ul>	\$25,000 (covered by commis- sions)
\$25,000	Included in actual charges above	Financial Services: <ul style="list-style-type: none"> <li>• Benefit Cost Impact</li> <li>• Cost and Contribution Calculations</li> <li>• Prepare Premium and COBRA Rate Calculations</li> <li>• Prepare and provide regular experience reporting for insured medical and vision plans</li> </ul>	\$25,000
\$10,000 (covered by commis- sions)	Included in commissions received above	Plan Review: <ul style="list-style-type: none"> <li>• Contract Review</li> <li>• Benefit Summary Review</li> <li>• Compliance Reviews</li> </ul>	\$10,000 (covered by commis- sions)
<b>\$125,000</b>	<b>\$124,187</b>	<b>Total</b>	<b>\$125,000</b>