

ATTACHMENT 1

SCOPE OF RESPONSIBILITY/EVALUATION REQUIREMENTS

EDIFY LLC
Chapman Schewe will:

1. Provide detailed project management for all issues regarding the District's Health & Welfare Plans along with a project plan and timelines.
2. Set up plan parameters, calculations, and other elements for current plans and the initial integration for the current plan year and ongoing.
3. Assign a designated Senior Consultant.
4. Provide monthly financial reports and analysis and quarterly medical economic reports with consultative information and recommendations.
5. Handle all carrier service issues assigned by The School District of Palm Beach County Employee Benefits staff.
6. Supervise implementation, including monitor open issues, coordinate meetings, review and/or assist with preparing communications materials, update/monitor implementation time lines, communicate with the School District of Palm Beach County management on project status.
7. Prepare request for proposal and coordinate with vendors as required.
8. Evaluate RFP responses and prepare recommendations in the form of a management report.
9. Negotiate on behalf of the district with any proposal process or renewal.
10. Coordinate and negotiate renewals, including annual open enrollment planning.
11. Prepare ad hoc reports, as assigned.
12. Provide legal resource referral.
13. Provide for patient advocacy using our staff of medical directors and clinicians.
14. Handle contracts and renewals with carriers MetLife (Term Life), Florida Combines Life (Income Protection) and as of 1/1/06 Eye-Med (Vision).

ATTACHMENT 2

Palm Beach Schools District Consulting Contract Performance

A. General Services Base Contract \$170,000

Life, Disability, Vision, and Dental

Renewal Management

Negotiations

Design

Medical RFP and Plan Renewal Management

Negotiation

Planning

Performance Guarantees

Develop RFP

Evaluate Responses and make recommendation

Reporting

Group Monitoring Report

Renewal Projections

Financial Utilization Report and analysis

B. Additional Program Services \$140,000

Key Disease State Program Management / Development \$50,000

Quarterly Report to illustrate outcomes for all Disease Management

Activities. Validation for optimal plan participation / stratification

Communication Support

Targeted Wellness Programs \$20,000

Ensure programs are developed and continue to evolve and

target specific issues prevalent in experience data

Health and Productivity program evaluation and recommendation

Network Performance – Vendor Performance \$20,000

Review Network performance for each plan and market

Report on Network contractual and utilization trend

Vendor Performance with service delivery and financial performance

Tax GASB 106 Issue \$25,000

Identify issue as it affects PBCSB retiree medical plan and provide

a detailed report that maps out a course of action for the District

to comply that is as cost efficient as possible with the new requirements.

Medicare Part D Support \$25,000

Provide ongoing guidance and direction on Medicare Part D

compliance matters. Assist the District with all filings and other

Related services that may be required to comply with this