

## MANAGEMENT REPORT

**Date:** October 15, 2024  
**To:** Mayor and Council  
**From:** Dave Bush, Director of Human Resources  
**Report Number:** COU24-111  
**Attachments:** None

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**Title:** Agreement Extension Benefits Consultant 2024

**Objective:** Extend the pre-existing agreement with the benefits consultant.

**Background:** The current benefits consultant is Mosey & Mosey, a full-service benefits consulting firm that focuses solely on group benefits. They deliver proactive plan management strategies and innovative solutions that help employers manage costs, while delivering a meaningful benefit program aligned with strategic goals and objectives. Mosey & Mosey provides the following services: plan design consulting, market survey & analysis, innovative cost containment strategies, effective risk management strategies, superior client support, budget forecasting, benchmarking & data analysis, collective bargaining support, financial management & renewal negotiation and employee education/communication services.

The City of Stratford issued RFP-2018-55 and the successful bidder was Mosey & Mosey. The initial agreement was signed January 28, 2019, with a start date of April 1, 2019, for a three-year term with two, one-year extensions. The initial agreement ended in March of 2024 and Mosey & Mosey has offered an extension of their agreement with the City of Stratford for the identical terms and conditions of the 2019 agreement. The term of the new agreement would be for the period ending August 26, 2027.

The benefit packages managed by Mosey & Mosey are for all the City's internal employee groups:

- ATU Local 741
- CUPE Local 197 Outside
- CUPE Local 1385 Inside
- IBEW Local 636 Parallel Transit
- IBEW Local 636 Water
- Stratford Professional Fire Fighters

- Administration

**Analysis:** Our experience with Mosey & Mosey has been excellent. They have provided great customer service, accurate and fast response, solid advocacy and a great value add relationship. They successfully led a platform change in 2023 with our carrier to upgrade the online platform for better access and claims support.

They are currently underway in negotiating our benefits package in the market (current provider is Manulife) and it is beneficial to the City that the relationship for continuity purposes continues.

The extension agreement has identical terms and conditions of the initial agreement. The annual remuneration, services provided, terms and renewal period remain identical.

Given the costs to extend the agreement remain as accepted in 2019 through RFP-2018-55 it makes fiscal sense to continue the established relationship versus returning to the market with a new request for proposal.

The cost for the service is not a separate line item, rather is built into the costs to the underlying provider, Manulife. The fee is 1.25% of the annual premium costs, currently \$24,000 up to a maximum cap of \$26,000 annually for the duration of the agreement. The cap is designed as a buffer related to staffing complement, rather than the percentage.

Mosey & Mosey carries insurance commercial general liability and errors and omission coverage consistent with the City's established requirements.

### **Financial Implications:**

#### **Financial impact to current year operating budget:**

Nominal, if any, as the costs are part of the 2024 approved benefits budget lines for each employee.

#### **Financial impact on future year operating budget:**

None, as the benefit renewal pricing is being held at current (2019) levels to the cap of \$26,000.

### **Alignment with Strategic Priorities:**

#### **Intentionally Change to Support the Future**

This report aligns with this priority as we look ahead to the future, it is crucial to base our decisions on this evolving change context. We must be people-centered in our decision making, lead from our values and continue to support staff.

## **Alignment with One Planet Principles:**

### **Health and Happiness**

Encouraging active, social, meaningful lives to promote good health and wellbeing.

### **Equity and Local Economy**

Creating safe, equitable places to live and work which support local prosperity and international fair trade.

**Staff Recommendation: THAT Council authorize the extension agreement with Mosey & Mosey benefit consultants;**

**AND THAT the Mayor and Clerk, or their respective delegates, be authorized to execute the agreement.**

<b>Prepared by:</b>	Dave Bush, Director of Human Resources
<b>Recommended by:</b>	Dave Bush, Director of Human Resources Joan Thomson, Chief Administrative Officer