

Clerk's Contract and Agreement Cover Page

Year:	2012	Legistar File ID#:	2011-0663
Multi Year:	<input checked="" type="checkbox"/>	Amount	\$57,500.00
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Contract Type:	Contractor's Form		
Contractor's Name:	Horton Group		
Contractor's AKA:			
Execution Date:	1/1/2012		
Termination Date:	12/31/2013		
Renewal Date:			
Department:	Administration/Village Manager		
Originating Person:	Stephana Przybylski		
Contract Description:	Service Retainer agreement - Jan 1, 2012 - Dec 31, 2013 \$57,500/year		

SERVICE RETAINER AGREEMENT

This Agreement is made this **1st Day of January, 2012**, between **The Village of Orland Park of 14700 Ravinia Avenue Orland Park, IL 60462-3167**, hereinafter referred to as **The Village of Orland Park**, and **THE HORTON GROUP, INC. of 10320 Orland Parkway, Orland Park, IL 60467** hereinafter referred to as "Horton".

WHEREAS, Horton, together with its affiliated entities (its "Affiliates"), operates insurance agencies and related businesses which procure numerous lines and types of insurance products and provide various related services to accounts located throughout the areas of the United States in which Horton and such Affiliates may operate, from time to time; and

WHEREAS, **The Village of Orland Park** desires to engage Horton to provide certain benefit services in exchange for the fees as outlined in this Agreement.

NOW, THEREFORE, the parties hereto agree as follows:

1. The term of this Agreement shall commence as of **January 1, 2012**, and shall remain in effect for a period of **twenty-four (24) months** thereafter ending on **December 31, 2013**, unless earlier terminated as hereinafter provided.
2. Complete fee structure by service category is **illustrated in the attached Fee-Based Pricing Proposal**. The fee for each twelve (12) month period **January 1, 2012 through December 31, 2013 is \$57,500**.
3. The Service Retainer is in lieu of standard agent commissions normally paid to Horton by the insurance carriers involved. Any standard agent commissions received by Horton shall be credited by Horton against past due and future installments of the Service Retainer. The credits shall be reflected at the end of the 12-month term.

Horton may receive additional compensation from the insurance companies, in the forms of, including but not limited to, contingent commission or bonus commission. Upon request, Horton is pleased to disclose all compensation amounts as well as any other contingent or similar agreements that may be in place.

4. The Service Retainer shall be compensation for the services **illustrated in the attached Fee-Based Pricing Proposal**.
5. Agreed to and included services only apply to those coverages and policies included within the Broker appointment to Horton evidenced by a fully executed broker-of-record letter(s) and not otherwise excluded or offered as an option(s) to be separately negotiated. They include:
 - a. **Medical, Rx**
 - b. **Dental**
 - c. **Vision**
 - d. **Life/AD&D**
 - e. **Flexible Spending Account**
 - f. **STD (ASO)**
 - g. **Employee Assistance Program/Crisis Response**

6. It is understood that this Service Retainer Agreement is open to review at any time by either party. It is also understood that in the event Horton's retention is terminated by **The Village of Orland Park** within 90 days of the inception of the insurance policy or contract, all unearned amounts of the Service Retainer previously paid to Horton will be refunded to **The Village of Orland Park** based on a pro rata calculation on the effective date of termination. It is also understood that in the event Horton's retention is terminated by **The Village of Orland Park** after 90 days of the inception of the applicable insurance policy or contract, all fees outlined in the Service Retainer Agreement are fully earned and shall become immediately due and payable.

7. The Service Retainer Agreement covers only those specifically listed services in the attached Fee-Based Pricing Proposal and only those operations currently insured by the insurance program to be serviced under this agreement. Fees for additional services requested or required by **The Village of Orland Park** shall be separately negotiated.

THE VILLAGE OF ORLAND PARK

By: 

Name: Paul G. Grimes

Its: Village Manager

Date: 12/14/11

THE HORTON GROUP, INC

By: 

Name: KENNETH OLSON

Its: DIVISION PRESIDENT

Date: 11/1/11

The Horton Group is an Equal Employment Opportunity Employer

**THE VILLAGE OF ORLAND PARK
Fee-Based Pricing Proposal**

Our proposed service charges are as follows:

Core Services	
Benefit Consulting and Brokerage Support, Benefit Plan Marketing, Plan Installation, Local Enrollment Meetings, Document Review and Compliance, Ongoing Administrative Client and Employee Customer Service	\$57,500 Annual Fee <i>Payable on a quarterly basis in four (4) equal installments</i>
Special Services	
Call Center Assistance (Claims, Billing, Eligibility) Benefit News Alerts	<i>Included in Core Services</i>
Financial	
Mid-Year Plan Performance -Benchmark Reporting and Reviews (with standard data provided by carriers)	<i>Included in Core Services</i>
Expanded Consulting	
Contribution Modeling	<i>Included in Core Services</i>
Wellness/Prevention/Education	
Health Fair Coordination (major locations) Includes preparation and coordination of carriers and vendors. Can be combined with consumer driven educational meetings.	<i>Included in Core Services. Outside vendor expenses to be discussed / considered at the time services arranged / performed. Travel expenses beyond 150 miles are covered by customer</i>
On-Site Health Assessments Flu Shots	<i>Direct cost from vendor. No additional Horton fee assessed.</i>
Annual Employee Benefit Statements	<i>Included in Core Services</i>
Monthly Wellness Newsletters supplied electronically	<i>Included in Core Services</i>
H.R. Connect (Employee Portal) My Wave (Employer Portal)	<i>Included in Core Services</i>
Open Enrollment	
Onsite Group Enrollment (major locations)	<i>Included in Core Services</i>
On-Line Enrollment Capabilities	Varies by vendor – bid solely on vendor capabilities and costs – no additional Horton fee assessed
Webinar and 1-800 Conference Call Based Enrollment Meetings	Employer provides Webcast