

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Approval of December 12, 2024, Agenda

ITEM #: 2024-018

Enclosure: Yes

Category: Approval of Agenda

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Under California Government Code Section 54950 the “Legislative Body” is required to post an agenda detailing each item of business to be discussed. The Authority posts the agenda in compliance with California Government Code Section 54954.2.

STATUS:

Unless items are added to the agenda according to Government Code Section 54954.2 (b) (1) (2) (3), the agenda is to be approved as posted.

RECOMMENDATIONS:

Subject to changes or corrections, the agenda is to be approved.

AGENDA

PUBLIC AGENCY COALITION ENTERPRISE (PACE)

BOARD OF DIRECTORS MEETING

December 12, 2024

2:00 pm

ZOOM MEETING: <https://zoom.us/j/98883843560>

Meeting ID: 988 8384 3560

Call-in number to access audio via phone not computer: +13052241968,,98883843560# US

Any document provided to a majority of the members of the Public Agency Coalition Enterprise (PACE) regarding any item on this agenda will be made available for public inspection at the meeting and at Keenan, 1111 Broadway, Suite 2000, Oakland, CA 94607 during normal business hours.

I. CALL TO ORDER

II. ROLL CALL

BOARD MEMBERS:

AVENAL, CITY OF	Antony López
BIG BEAR FIRE AUTHORITY	TBD
CARMEL AREA WASTEWATER DISTRICT	Barbara Buikema
CLAREMONT, CITY OF	Christi Giannone
COMMUNITY ACTION PARTNERSHIP OF KERN	Lisa McGranahan
COMPASS CHARTER SCHOOLS	Sophia Trivino
CORCORAN, CITY OF	Marlene Spain
DANVILLE, TOWN OF	Qiana London
DESERT HOT SPRINGS, CITY OF	Brent Jones
DOS PALOS, CITY OF	Manuela Sousa
FORESTHILL PUBLIC UTILITY DISTRICT	Henry White
FOWLER, CITY OF	Angela Vasquez
GUSTINE, CITY OF	Melanie Correa
HOUSING AUTHORITY OF SAN LUIS OBISPO	Ken Litzinger
HUMBOLDT BAY FIRE DISTRICT	Scott Bauer
HURON, CITY OF	Balvina Caldera
LEMOORE, CITY OF	TBD
LINDSAY, CITY OF	Mari Carrillo
LIVINGSTON, CITY OF	Arcelia Cruz
MODOC COUNTY	Chester Robertson
NEWMAN, CITY OF	Mike Maier
REDWOOD COAST ENERGY AUTHORITY	Eileen Verbeck
REGIONAL GOVERNMENT SERVICES	Jennifer Seibert
RIO DELL, CITY OF	Joanne Farley
SAN BERNARDINO COUNTY EMPLOYEES' RETIREMENT ASSOC.	Stacey Barnier

SANGER, CITY OF
SONORA, CITY OF
SUPERIOR COURT OF CALIFORNIA, EL DORADO COUNTY
SUPERIOR COURT OF CALIFORNIA, KINGS COUNTY
SUPERIOR COURT OF CALIFORNIA, MENDOCINO CO.
SUPERIOR COURT OF CALIFORNIA, SUTTER COUNTY
SUTTER CREEK
TRUCKEE-DONNER RECREATION & PARK DISTRICT
UPLAND, CITY OF

Amanda Champion
Chris Gorsky
Heather Nelson
Nocona Soboleski
Kim Turner, **Vice President**
Joe Azevedo
Karen Darrow
David Faris, **President**
Theresa Doyle

ALTERNATES:

AVENAL, CITY OF
BIG BEAR FIRE AUTHORITY
CARMEL AREA WASTEWATER DISTRICT
CLAREMONT, CITY OF
COMMUNITY ACTION PARTNERSHIP OF KERN
COMPASS CHARTER SCHOOLS
CORCORAN, CITY OF
DANVILLE, TOWN OF
DESERT HOT SPRINGS, CITY OF
DOS PALOS, CITY OF
FORESTHILL PUBLIC UTILITY DISTRICT
FOWLER, CITY OF
GUSTINE, CITY OF
HOUSING AUTHORITY OF SAN LUIS OBISPO
HUMBOLDT BAY FIRE DISTRICT
HURON, CITY OF
LEMOORE, CITY OF
LINDSAY, CITY OF
LIVINGSTON, CITY OF
MODOC COUNTY
NEWMAN, CITY OF
REDWOOD COAST ENERGY AUTHORITY
REGIONAL GOVERNMENT SERVICES
RIO DELL, CITY OF
SAN BERNARDINO COUNTY EMPLOYEES' RETIREMENT ASSOC.
SANGER, CITY OF
SONORA, CITY OF
SUPERIOR COURT OF CALIFORNIA, EL DORADO COUNTY
SUPERIOR COURT OF CALIFORNIA, KINGS COUNTY
SUPERIOR COURT OF CALIFORNIA, MENDOCINO COUNTY
SUPERIOR COURT OF CALIFORNIA, SUTTER COUNTY
SUTTER CREEK, CITY OF
TRUCKEE-DONNER RECREATION & PARK DISTRICT
UPLAND, CITY OF

Griselda Price
Kristin Mandolini
James Grover
Heidi Tanner
Lisa McGranahan
Jesse Zamora
TBD
Lani Ha
Geoffrey Buchheim
Dewayne Jones
TBD
Wilma Tucker
Desirae Porras
Jenna Franz
Robert Murias
TBD
Amanda Champion
Lance Rowell
Christopher Lopez
Pam Randall
Michael Holland
Kristy Siino
Chris Paxton
Karen Dunham
Iliana Carreon
TBD
TBD
Dawn West
Mona Melchor
April Allen
Debbie Baggett
TBD
Sven Leff
Rocio Preciado

MANAGERS:
KEENAN & ASSOCIATES

Peter McNamara
Teri Graf
Melissa King
Christine Hough
Mariana Torres Hernandez

OTHERS:
KEENAN & ASSOCIATES

Laurie LoFranco
Eugene Yu
Dawn Almanzor
Robin Neer
Marie Edmondson
Pam Cote
Edwin Esteron
Marshawn Swims
Tiffany Garcia
Megan Gardner
Alexandra Van Brunt

ANTHEM

Darren Reddick
Alaina Mattox
Karisa Kirkman

GALLAGHER

Leslie Anderson

III. PUBLIC COMMENTS

Comments from the general public will be received and limited to five minutes per person.

IV. APPROVAL OF AGENDA – December 12, 2024,	Action
Presented by David Faris	2024-018

V. APPROVAL OF MINUTES – August 21, 2024,	Action
Presented by David Faris	2024-019

The Authority will review the minutes of the last Board Meeting for any adjustments and adoption.

VI. CORRESPONDENCE	Information
Presented by E. Peter McNamara	2024-020

Correspondence will be presented and reviewed by the Board. No action may be taken in response; only referred for action on a subsequent agenda.

VII. FINANCIAL

MONTHLY FINANCIAL REPORT

Presented by Sam Mel-Chan

Information
2024-021

The Board will hear a report on the Financial Review and the LAIF Account Statement as of October 31, 2024.

ANTHEM UPDATE

Presented by Darren Reddick

Information
2024-022

The Board will hear a report from Anthem.

ANCILLARY UPDATES

Presented by Melissa King and Samantha Tappe

Information
2024-023

The Board will hear a report on LiveHealth Online and EmpiRx utilization.

WELLNESS UPDATES

Presented by Mariah Caracoza & Robin Rager

Action
2024-024

The Executive Committee will hear a report on the 2024 Wellness Program and the 2025 Personify Program Implementation timeline and preliminary member communication campaign.

VIII. ADMINISTRATION

PACE NEW MEMBER ACTIVITY

Presented by Christine Hough

Information
2024-025

The Board will discuss marketing activity of the PACE JPA since the last Board Meeting.

ELECTION OF PRESIDENT AND SECRETARY TREASURER

FOR JANUARY 1, 2025 – DECEMBER 31, 2026, TERM

Presented by E. Peter McNamara

Action
2024-026

The Board will discuss and elect a President and Secretary Treasurer Executive Committee Member positions for the January 1, 2025 – December 31, 2026, term.

ELECTION OF ONE NON-OFFICER EXECUTIVE COMMITTEE MEMBER

TO COMPLETE THE JANUARY 1, 2024 – DECEMBER 31, 2025, TERM

Presented by E. Peter McNamara

Action
2024-027

The Board will discuss and elect a Non-Officer Executive Committee Member position for the January 1, 2024 – December 31, 2025, term.

IX. INFORMATION

MEMBER COMMENTS

Information

Each member may report about various matters involving the Authority. There will be no Authority discussion except to ask questions, and no action will be taken unless listed on a subsequent agenda.

MANAGER COMMENTS

Information

PACE Management will report to the Authority about various matters involving the Authority. There will be no Authority discussion except to ask questions, and no action will be taken unless listed on a subsequent agenda.

X. AGENDA ITEMS NEXT MEETING

Information

Members and others may suggest items for consideration at the next meeting which will be held March 26, 2025, via zoom.

XI. ADJOURNMENT

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

DATE:

December 12, 2024

Board of Directors

SUBJECT:

ITEM #:

2024-019

Approval of August 21, 2024, Minutes

Enclosure:

Yes

Category:

Approval of Minutes

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

As a matter of record and in accordance with the Brown Act, minutes of each meeting are kept and recorded.

STATUS:

Included in the agenda packet are minutes from the August 21, 2024 meeting which have not yet been approved.

RECOMMENDATIONS:

Subject to changes or corrections, the minutes are to be approved and submitted.

MINUTES

PUBLIC AGENCY COALITION ENTERPRISE (PACE)

BOARD OF DIRECTORS MEETING

August 21, 2024

12:30 pm

ZOOM MEETING: <HTTPS://ZOOM.US/J/92686359283>

Meeting ID: 926 8635 9283

Call-in number to access audio via phone not computer: +13052241968,,92686359283# US

I. CALL TO ORDER

The meeting was called to order at 12:37am

II. ROLL CALL

BOARD MEMBERS:

AVENAL, CITY OF	Griselda Price
BIG BEAR FIRE AUTHORITY	Christen
CARMEL AREA WASTEWATER DISTRICT	Barbara Buikema
CLAREMONT, CITY OF	Jamie Earl
COMPASS CHARTER SCHOOLS	Sophia Trivino
DANVILLE, TOWN OF	Qiana London
DESERT HOT SPRINGS, CITY OF	Brent Jones
FOWLER, CITY OF	Angela Vasquez
GUSTINE, CITY OF	Melanie Correa
HOUSING AUTHORITY OF SAN LUIS OBISPO	Jenna Franz
HUMBOLDT BAY FIRE DISTRICT	Scott Bauer/ LISA
LINDSAY, CITY OF	Lance Rowell
LIVINGSTON, CITY OF	Arcelia Cruz
MODOC COUNTY	Chester Robertson
NEWMAN, CITY OF	Mike Maier
REDWOOD COAST ENERGY AUTHORITY	Kristy Siin
REGIONAL GOVERNMENT SERVICES	Jennifer Seibert
RIO DELL, CITY OF	Joanne Farley
SAN BERNARDINO COUNTY EMPOLYEES' RETIREMENT ASSOC.	Stacey Barnier
SANGER, CITY OF	Becky Padron, Secretary/Treasurer
SUPERIOR COURT OF CALIFORNIA, EL DORADO COUNTY	Heather Nelson
SUPERIOR COURT OF CALIFORNIA, KINGS COUNTY	Nocona Soboleski
SUPERIOR COURT OF CALIFORNIA, MENDOCINO CO.	Kim Turner, Vice President
SUPERIOR COURT OF CALIFORNIA, SUTTER COUNTY	Joe Azevedo
SUTTER CREEK	Karen Darrow
TRUCKEE-DONNER RECREATION & PARK DISTRICT	David Faris, President
UPLAND, CITY OF	Rocio Preciado

ALTERNATES:

AVENAL, CITY OF
BIG BEAR FIRE AUTHORITY
CARMEL AREA WASTEWATER DISTRICT
CLAREMONT, CITY OF
COMMUNITY ACTION PARTNERSHIP OF KERN
COMPASS CHARTER SCHOOLS
CORCORAN, CITY OF
DANVILLE, TOWN OF
DESERT HOT SPRINGS, CITY OF
DOS PALOS, CITY OF
FORESTHILL PUBLIC UTILITY DISTRICT
FOWLER, CITY OF
GUSTINE, CITY OF
HOUSING AUTHORITY OF SAN LUIS OBISPO
HUMBOLDT BAY FIRE DISTRICT
HURON, CITY OF
LEMOORE, CITY OF
LINDSAY, CITY OF
LIVINGSTON, CITY OF
MODOC COUNTY
NEWMAN, CITY OF
REDWOOD COAST ENERGY AUTHORITY
REGIONAL GOVERNMENT SERVICES
RIO DELL, CITY OF
SAN BERNARDINO COUNTY EMPOLYEES' RETIREMENT ASSOC.
SANGER, CITY OF
SONORA, CITY OF
SUPERIOR COURT OF CALIFORNIA, EL DORADO COUNTY
SUPERIOR COURT OF CALIFORNIA, KINGS COUNTY
SUPERIOR COURT OF CALIFORNIA, MENDOCINO COUNTY
SUPERIOR COURT OF CALIFORNIA, SUTTER COUNTY
SUTTER CREEK, CITY OF
TRUCKEE-DONNER RECREATION & PARK DISTRICT
UPLAND, CITY OF

Griselda Price
Kristin Mandolini
James Grover
Heidi Tanner
Lisa McGranahan
Jesse Zamora
TBD
Lani Ha
Geoffrey Buchheim
Dewayne Jones
TBD
Wilma Tucker
Desirae Porras
Jenna Franz
Robert Murias
TBD
Amanda Champion
Lance Rowell
Christopher Lopez
Pam Randall
Michael Holland
Kristy Siino
Chris Paxton
Karen Dunham
Iliana Carreon
TBD
TBD
Dawn West
Mona Melchor
April Allen
Debbie Baggett
TBD
Sven Leff
Rocio Preciado

MANAGERS:

KEENAN & ASSOCIATES

Peter McNamara
Melissa King
Christine Hough
Mariana Torres Hernandez

OTHERS:

KEENAN & ASSOCIATES

Eugene Yu

Marie Edmondson

Edwin Esteron
Marshawn Swims
Tiffany Garcia
Megan Gardner
Gordon Fung
Teri Graf
Sam Mel Chan
Robin Rager
Mariah Caracoza

HUMBOLDT BAY FIRE	Jenna Harris
ANTHEM	Darren Reddick Alaina Mattox
GALLAGHER	Leslie Anderson

III. PUBLIC COMMENTS

There were no comments.

IV. APPROVAL OF AGENDA – August 21, 2024, Presented by David Faris	Action 2024-010
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Motion to approve the August 21, 2024, meeting agenda 1. Chester Robertson 2. Kim Turner

V. APPROVAL OF MINUTES – May 30, 2024, Presented by David Faris	Action 2024-011
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Motion to approve the May 30, 2024, meeting minutes 1. Kim Turner 2. Chris Gorsky

VI. CORRESPONDENCE Presented by E. Peter McNamara	Information 2024-012
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Correspondence was presented and reviewed by the Board.

VII. ADMINISTRATION

ANTHEM UPDATE Presented by Darren Reddick	Information 2024-013
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The Board heard a report from Anthem.

Darren shared a report on Anthem's data from January 2024 thru July 2024 comparing to prior period 1 of the year 2023. According to the Medical Pharmacy Paid Amount Summary, high-cost claimants paid greater than 100K. Medical Total Paid amount for this current period are \$12.2 million compared to prior period of \$7.4 million.

ANCILLARY UPDATES

Presented by Melissa King

Information

2024-014

The Board heard a report on LiveHealth Online and EmpiRx utilization.

LiveHealth utilization had several registration and visits in the last couple of months with a spike in July. Utilization going up to 34 visits being our highest month so far in our recent history.

Empirix Utilization has had a dip in the recent month of July, due to the transition of specialty drugs being filled with the new provider through Empirix. Overview of total claims, specialty claims only makes up 1.2% of our total claims and account for 36.5% of total spend.

WELLNESS UPDATES & NEW PROGRAM DISCUSSION

Presented by Mariah Caracoza & Robin Rager

Action

2024-015

The Board heard a report on the 2024 Health Management program and vote on the 2025 Program.

Participation updates. 176 members (5%) are registered with 163 employees and 13 spouses. 79 participants have reached reward status already. 26 participants in Bronze Status, 25 participants in Silver Status, 19 participants in Gold Status, and 9 participants in Platinum Status.

2024 Campaigns

- The Stress-Free campaign from August 5, 2024, thru September 15, 2024
- Walktober Challenge registration will be opening mid-September running from October 1-31, 2024.

Wellness Advisory Committee meeting was held Wednesday, May 8th, 2024.

VirginPulse Program, Keenan will cover the First year's costs in 2025 for employees only, no spouses. \$200 rewards, and total health population coaching.

Motion to approve 1. Kim Turner from Mendocino County 2. David Farris

VIII. FINANCIAL

FINANCIAL REPORT

Presented by Sam Mel-Chan

Information

2024-016

The Board heard a report on the Financial Review and the LAIF Account Statement as of June 30, 2024.

Revenue was 22.52 million, Expenditures were 23.9 million. Total assets compared to prior year are a 2.85% decrease. Total liabilities compared to prior year are an increase of 16.35%. The total net position compared to prior year has decreased by 12.88%. The cash flow analysis as of 6/30/24 the beginnings cash balance primarily in CAMP is \$11.32 million, We received in cash \$23.14 million and the amount spent was \$23 million, making the ending cash balance as of 6/30/24 is \$11.43 million. Projected cash balance for the

end of the year 12/21/2024 is \$11.33 million.

2025 RENEWAL ACTION

Presented by E. Peter McNamara and Christine Hough

Action
2024-017

The Board will review and discuss the recommended renewal options from the Executive Committee. All PACE agencies renew on a calendar year cycle.

Self-funded Anthem PPO

Claims have been running much higher than prior years. To support this, we have made the following recommendations for the 2025 renewal.

1. Keenan will be covering PACE's Wellness Program expenses, removing the \$5 per employee per month from the premium.
2. Without margin we are coming in at 10.9%, July has not been good, and August is also trending higher.
3. The Executive Committee is looking to use up to \$1,000,000 of reserves to reduce the renewal to 7.1%.
4. We do recommend using a margin between 2-2.5% for the renewal.

Motion to have the full board accept the executive committee's recommendation to use up to \$1,000,000

1. Kim Turner 2. Becky Patron

Jennifer Seibert from RGS asked to understand the 7.1% renewal versus the 9.49%, which has the difference of the 2.5% margin included.

Fully insured Anthem HMO

Initial renewal came in a 18.88% based on claims through March 2024. We asked them to look at claims through May 2024, which then increased the renewal to 19.5%, they offered to make a business decision to come down to 13.5%. We have continued to negotiate these rates and they came down to 11.5% this morning. We would like to ask the Executive Committee to accept a renewal of 11.5% or lower, to allow for additional negotiation.

Motion to approve 1. Melanie Correa Gustine 2. Kim Turner Mendocino

Fully insured Kaiser HMO

As our membership has grown, Kaiser has not been willing to have a blended renewal between the two regions. The Northern California increase was 11% and the Southern California increase -0.5%. We have asked them to blend this renewal. Keenan will be giving our members a combined renewal for the entire pool. We anticipate 4.71% based upon Keenan's calculation. To be safe, we would like to approve up to 6% as the renewal, but we believe it will be 5% or less.

Motion to approve 1. Stacey Barnier 2. Becky Pardon

IX. INFORMATION

MEMBER COMMENTS

Information

Each member may report about various matters involving the Authority. There will be no Authority discussion except to ask questions, and no action will be taken unless listed on a subsequent agenda.

- Lisa McGranahan – when those rates are complete will we get a final summary explaining the rates

for both Kaiser and Anthem HMO?

- Joann from Rio Dell – offering retiree benefits – webinar with compliance issues Medicare reporting issues that we must follow starting 2025.

MANAGER COMMENTS

Information

There were no Manager comments.

X. AGENDA ITEMS NEXT MEETING

Information

Members and others may suggest items for consideration at the next meeting which will be held December 12, 2024,

XI. ADJOURNMENT

Meeting was adjourned at 1:49 pm

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Correspondence

ITEM #: 2024-020

Enclosure: Yes

Category: Correspondence

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Communications received by, or sent on behalf of, PACE will be presented to the Board. These communications are normally informational in content and no action is required except to acknowledge the communication.

STATUS:

PACE Management will review correspondence received by or sent on behalf of PACE.

RECOMMENDATIONS:

If the Board decides further discussions or actions are required on any specific communication, they will direct it to be placed on a future agenda and/or have PACE Management research the issue further.

Mariana Torres Hernandez

From: Reddick, Darren <Darren.Reddick@anthem.com>
Sent: Friday, December 6, 2024 10:45 AM
To: Melissa King; Teri Graf; Everett McNamara
Cc: Mattox, Alaina
Subject: RE: Anthem-Premium Past Due Notice Emails

Hi Melissa,

Thanks for the follow up. The email was inadvertently sent by Anthem. The emails were sent on December 2nd due to an outdated IT job that was accidentally enabled.

We will be sending clarification emails/texts to anyone who received the initial email informing them that it was sent in error, and they can disregard. We will reassure them that their plan is active and there are no issues with their membership. I did get a list of the actual members that received the email and there was no one attached to PACE on the list.

Thank you,



Darren Reddick
CA License #0B31077
Strategic Account Executive, Anthem Blue Cross
3080 Bristol Street, 2nd Floor, Costa Mesa, CA, 92626
Phone: 949-803-4621
darren.reddick@anthem.com

From: Melissa King <mking@keenan.com>
Sent: Friday, December 6, 2024 10:27 AM
To: Reddick, Darren <Darren.Reddick@anthem.com>; Teri Graf <tgraf@keenan.com>; Everett McNamara <pmcnamara@Keenan.com>
Cc: Mattox, Alaina <alaina.mattox@anthem.com>
Subject: {EXTERNAL} RE: Anthem-Premium Past Due Notice Emails

Hi Darren,

Just checking in to see if there were any updates on the phishing emails. Do we have a sender's email address?

Thanks!

Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Reddick, Darren <Darren.Reddick@anthem.com>
Sent: Tuesday, December 3, 2024 4:25 PM
To: Teri Graf <tgraf@keenan.com>; Everett McNamara <pmcnamara@Keenan.com>; Melissa King <mking@keenan.com>
Cc: Mattox, Alaina <alaina.mattox@anthem.com>
Subject: Anthem-Premium Past Due Notice Emails

Keenan Team,

I am reaching out to let you now that some of the PACE employees and dependents may receive premium past due emails from Anthem. This is currently being reviewed by compliance. Please inform PACE that the employees should not click on the links. Our internal team is aware and advising members that call in and ask to not click on the links related to this. As soon as I know more, I will communicate it.

Thank you,



Darren Reddick
CA License #0B31077
Strategic Account Executive, Anthem Blue Cross
3080 Bristol Street, 2nd Floor, Costa Mesa, CA, 92626
Phone: 949-803-4621
darren.reddick@anthem.com

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AGREEMENT FOR PROVISION OF VIRGIN PULSE PROGRAM SERVICES

This agreement is executed as of the 25th day of September, 2024, (the “**Execution Date**”) by and between Keenan & Associates (“Keenan”), a subsidiary of Assured Partners, Inc. (“AP”) and Public Agency Coalition Enterprise (PACE) (“Client”). Keenan shall hereafter be referred to as “**Keenan**.” Keenan and Client are sometimes hereinafter collectively referred to as the “**Parties**” and individually as a “**Party**.”

Background

A. WHEREAS, Keenan has been authorized by Virgin Pulse (“Developer”) as a distributor of Virgin Pulse Programs, health and wellbeing programs and associated services designed to motivate and reward Members for certain health-related actions, as defined further below (“VP Program Services”).

B. WHEREAS, Client would like to purchase the VP Program Services for use with its employees and other eligible individuals.

C. WHEREAS, Keenan shall make the VP Program Services available to Client subject to the terms and conditions set forth in this Agreement.

Agreement

1. **DEFINITIONS.** For purposes of, and subject to the terms of this Agreement, the following terms shall have the meanings hereinafter ascribed to them.

1.1. **VP Program Service Fees** means all the fees to be paid under this agreement as set forth in the customer order form (“Customer Order Form”) attached hereto and incorporated herein as Exhibit A. It is understood that a portion of the VP Program Service Fees will be retained by Keenan as an administration fee.

1.2. **Eligibles** shall mean all individuals provided on an eligibility file (“Eligibility File”) provided by the Client to Keenan, who are eligible to enroll in the VP Program Services.

1.3. **Eligibility File** shall mean a monthly file provided by Client to Keenan in accordance with the file format and content requirements outlined by Keenan in its Eligibility File Specifications (to be provided to Client as a separate document).

1.4. **Member** means an authorized Eligible enrolled in the VP Program Services.

1.5. **Member Data** means any information entered by Members into the VP Program Services, or information for which the Member has provided its consent to be shared with Keenan and Developer.

1.6. **Rewards** means gift cards, merchandise, charitable contributions, medical premium discount, or other incentive provided to VP Program Services participants for their completion of certain rewards points criteria for earning those rewards, based on the Client’s rewards design as indicated in Exhibit C – Rewards Design and Exhibit D – Points Earning Opportunities.

1.7. **Developer Marks** means those trademarks which are registered or the subject of a pending application by Virgin Enterprises Limited “VEL”, Virgin Pulse, Inc. or other relevant Virgin Group company, together with such other trademark applications which may be made by VEL or any of its affiliates and any resulting registrations together with the “Virgin” signature, the Virgin Pulse logo, the name “Virgin” and the names: “Virgin Pulse,” and “Max Buzz”TM activity tracking device, in each case that Virgin Pulse has the right and license to use.

1.8. **Program** means a proprietary Member-oriented, interactive and internet supported, incentivized health and fitness program designed by Developer for Keenan Clients which is designed to motivate and reward Members for certain health-related actions.

2. **VP PROGRAM SERVICES**

Keenan shall make available to Client the VP Program Services described on the customer order form (“Customer Order Form”) and listed on the Virgin Pulse program services checklist (“Virgin Pulse Program Services Checklist”) attached hereto and incorporated herein as Exhibits A and B. Client’s continued access to the VP Program Services shall at all times be contingent upon Client’s compliance with the terms and conditions of this Agreement. If at any time Keenan or the Developer determines that Client is violating the terms of this Agreement, Client’s access to the VP Program Services may be terminated. A full description of the VP Program Services can be found in Description of Services attached to and incorporated herein as Exhibit E.

3. **DELIVERY OF VP PROGRAM SERVICES**

3.1 Once Members have been enrolled in the Virgin Pulse Program, Developer shall be responsible for delivering the VP Program Services packages in accordance with agreed upon program designs.

3.2 Developer shall deliver or make available the applicable VP Program Services packages to Members in accordance with Exhibits A and B, after the launch date for Client’s program, which program shall include: (i) maintaining the Virgin Pulse Program website such that Members can access, shop, and redeem rewards; (ii) delivering other services as applicable; and (ii) providing operational and call center support to Members. Notwithstanding the foregoing, Keenan acknowledges and agrees that the delivery and availability of the foregoing services by Virgin Pulse shall depend on the timely transmission of information to Virgin Pulse and the performance of Keenan's duties pursuant to the terms and provisions of this Agreement.

4. **KEENAN’S RESPONSIBILITIES**

4.1 **Program Implementation and Ongoing Support**

Keenan shall be the primary point of contact for interaction with Client and will have responsibility for coordinating and managing Client support for the VP Program Services, with assistance from Virgin Pulse in the onboarding process, program implementation, and ongoing provision of the program services provided to Client.

Keenan shall bear primary responsibility for the implementation of the VP Program Services for Client’s Eligibles.

Keenan shall provide Eligibility File to Virgin Pulse and shall bear the burden of ensuring that any Eligibility File received from Client is received in full compliance with applicable international, national, and local privacy laws.

4.2. Administrative Resources

Keenan shall provide administrative resources to Client as delineated in Exhibit E under “Administrative Resources.”

4.3. Program Reporting and Analytics

Keenan shall provide program reporting and analytics to Client as delineated in Exhibit B under “Program Reporting and Analytics.”

4.4 Fees and Payments

Keenan shall collect the VP Program Services Fees as set forth in the Customer Order Form (Exhibit A), and shall remit payment of those fees to Developer, less Keenan’s administration fee. Biometric screening services will be invoiced under a separate agreement between Client and the screening vendor.

5. CLIENT OBLIGATIONS

5.1 Client Assistance

Client shall make available in a timely manner at no charge to Keenan all content, graphic files, Client Data, Client Brand information or other information and resources of Client required by Developer for the performance of its obligations under this Agreement. Client shall be responsible for, and assumes the risk of, any problems resulting from, the content, accuracy, completeness and consistency of all such content, materials and information supplied by Client.

5.2 Provision of Data

Promptly after the Effective Date and on a monthly basis thereafter, Client shall provide Keenan consistent with state privacy laws, with an initial eligibility file thirty (30) days prior to the Initial Order Start Date, and monthly thereafter, that discloses the Eligibles and includes the required information as indicated in the Eligibility File Specifications to enable Keenan and Developer to administer the VP Program Services provided by this Agreement. Keenan and/or Developer, will be required to share all or a portion of this information for the provision of biometric services to fulfill its obligations under this Agreement or any additional Statement of Work. Developer may be further required to share this information to Authorized Partners, Connected Partners and Certified Partners to fulfil its obligations under this Agreement or any additional Statements of Work. This information and any Eligible additions and terminations shall be kept current on at least a monthly basis and, unless otherwise agreed upon by the Parties, shall be provided by Client to Keenan by the fifteenth (15) day of each month during the Term. Client shall be responsible for any errors with respect to the information provided, including any failure to report employee terminations, or termination of an Eligible from participation in the Virgin Pulse Program. The Parties acknowledge and agree that such information set forth above shall be deemed Client Data and shall be treated as Client’s confidential information under this Agreement.

6. NO LICENSE; USE OF MARKS

Client understands that this agreement shall not grant or transfer any ownership or right to the intellectual property of the Developer except as may be set forth in this Agreement. Furthermore, Client may not use any service/trade names, nor service/trademarks of the other Developer or Keenan without the express prior written consent of the Party whose service/trademark or name is to be used.

7. TERM AND TERMINATION

7.1 **Term.** The initial term (“**Initial Term**”) of this Agreement shall commence on the Execution Date and shall end on December 31, 2025, unless earlier terminated in accordance with this Agreement. Thereafter, the Agreement shall automatically renew for successive one (1) year terms (each such term a “**Renewal Term**”), unless at least ninety (90) days prior to the beginning of any Renewal Term, either Party gives the other Party written notice to the other Party of its intent not to renew this Agreement. Together, the Initial Term and any Renewal Terms shall constitute the “**Term**.”

7.2 It is recognized that Client’s right to the continued use of the VP Program Services is contingent not only upon Client’s compliance with the terms of this Agreement, but also with Keenan’s status as an approved distributor of Developer’s VP Program Services. If Keenan ceases to be an approved distributor, Client’s access to the VP Program Services shall cease, but Client shall have the right to contract directly with the Developer for such services. Annual fees paid to Keenan in advance will be prorated through the date of termination.

7.3 This Agreement may be terminated upon the occurrence of any of the following events (with each Party reserving cumulatively all other rights and remedies under this Agreement, in law and/or in equity) without further obligation or liability to the other Party (except as specified herein):

- i. By either Party upon the dissolution or insolvency of a Party to this Agreement;
- ii. By either Party following the filing of a bankruptcy petition by or against either Party (if the petition is not dismissed within sixty (60) days in the case of an involuntary bankruptcy petition);
- iii. If the application of any law, rule, regulation, or court or administrative decision prohibits the continuation of this Agreement or would cause a penalty to either Party if the Agreement is continued, and if the Agreement cannot be amended to conform to such law, rule, regulation, or court, or administrative decision in a manner that would preserve the original intent of the Parties with respect to their rights and duties under this Agreement; or
- iv. By the non-breaching Party if a breach of this Agreement is not cured within thirty (30) days following receipt of written notice of the breach from the non-breaching Party;
- v. Either Party may terminate this Agreement for convenience on an annual basis by giving written notice pursuant to Section 9.1 (b) thirty (30) days prior to the anniversary of the Effective Date.

7.4 **Effect of Termination.** Upon termination or expiration of this Agreement for any reason Client's access to the VP Program Services shall cease.

8. REPRESENTATIONS AND WARRANTIES; LIMITATION OF LIABILITY

8.1 **Mutual Representations.** Each Party hereby represents and warrants to the other Party: (a) that it is duly organized, validly existing and in good standing under the laws of its jurisdiction of incorporation or organization; (b) that the execution and performance of this Agreement will not conflict with or violate any provision of any law having applicability to such Party; (c) that this Agreement, when executed and delivered, will constitute a valid and binding obligation of such Party and will be enforceable against such Party in accordance with its terms; (d) that it will perform its obligations under this Agreement in accordance with all applicable laws, rules and regulations.

8.2 **Keenan Warranties.** Keenan hereby represents, warrants and covenants to Client that: (a) any services rendered on behalf of Client or a Member by Keenan will be performed by appropriately qualified and trained personnel with due care and diligence and to standards of quality that are customary in the industry; and (b) Keenan does not make or offer any warranties of any kind regarding the VP Program Services. It is recognized that the VP Program Services are developed and maintained by the Developer without the input of Keenan, and it is agreed that Keenan shall have no liability for any loss or damage sustained by Client as a result of its purchase, access to, or use of the VP Program Services, except to the extent that such loss or damage was the direct result of any action, inaction or willful misconduct of Keenan.

8.3 **DEVELOPER DISCLAIMER.** OTHER THAN AS EXPRESSLY SET FORTH HEREIN, KEENAN AN BEHALF OF ITSELF AND DEVELOPER DISCLAIMS ALL WARRANTIES OF ANY KIND EXPRESS OR IMPLIED OR STATUTORY WITH RESPECT TO THE VP PROGRAM SERVICES, THE MAX ACTIVITY TRACKING DEVICE, THE HEALTH STATIONS, AND/OR ANY PRODUCTS OR SERVICES RELATED TO ANY OF THE FOREGOING, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTY OF TITLE, MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, SYSTEM INTEGRATION OR DATA ACCURACY OR ANY WARRANTIES ARISING OUT OF A COURSE OF PERFORMANCE, DEALING OR TRADE USAGE AND THEIR EQUIVALENTS UNDER THE LAWS OF ANY JURISDICTION EXCEPT AS EXPRESSLY PROVIDED IN THIS AGREEMENT. OTHER THAN AS EXPRESSLY SET FORTH HEREIN, THE VP PROGRAM SERVICES, THE MAX ACTIVITY TRACKING DEVICE, THE HEALTH STATIONS, AND ANY PRODUCTS OR SERVICES RELATED TO ANY OF THE FOREGOING ARE MADE AVAILABLE TO KEENAN AND CLIENT ON AN "AS-IS" AND "WITH-ALL-FAULTS" BASIS. CLIENT AGREES THAT IT HAS NOT RELIED ON ANY REPRESENTATION THAT IS NOT EXPRESSLY SET OUT IN THIS AGREEMENT, AND NO ORAL OR WRITTEN ADVICE OR INFORMATION PROVIDED BY KEENAN OR DEVELOPER SHALL CREATE ANY WARRANTY.

8.4 **EXCLUSION OF REMEDIES; LIMITATION OF LIABILITY** IN NO EVENT WILL EITHER PARTY BE LIABLE TO THE OTHER PARTY FOR ANY INCIDENTAL, INDIRECT, SPECIAL, CONSEQUENTIAL OR PUNITIVE DAMAGES, REGARDLESS OF THE NATURE OF THE CLAIM, INCLUDING, WITHOUT LIMITATION, LOST PROFITS, COSTS OF DELAY, ANY FAILURE OF DELIVERY, BUSINESS INTERRUPTION, COSTS OF LOST OR DAMAGED DATA OR DOCUMENTATION, OR

LIABILITIES TO THIRD PARTIES ARISING FROM ANY SOURCE, EVEN IF A PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THIS LIMITATION UPON DAMAGES AND CLAIMS IS INTENDED TO APPLY WITHOUT REGARD TO WHETHER OTHER PROVISIONS OF THIS AGREEMENT HAVE BEEN BREACHED OR HAVE PROVEN INEFFECTIVE. IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER PARTY FOR ANY CLAIMS OR DAMAGES IN EXCESS OF THE AMOUNTS PAID BY CLIENT TO KEENAN PULSE HEREUNDER DURING THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO THE CLAIM.

9. **INDEMNIFICATION** Keenan shall defend, indemnify and hold harmless Client and its respective officers, directors, employees and agents against any and all Claims and indemnify and hold harmless Client from all Damages finally awarded or payable in settlement to such third party where such Claim arises as a result of Keenan's (a) failure to perform as required by this Agreement (b) breach of this Agreement; (c) negligence or other intentional misconduct relating to the subject matter of this Agreement; or (d) violation of any applicable law, regulation or order relating to the subject matter of this Agreement. Client shall promptly notify Keenan in writing of any Claim for which indemnification is sought hereunder, cooperate with Keenan, and allow Keenan sole authority to control the defense and settlement of such Claim.

10. MISCELLANEOUS

10.1 **Notices.** Any notices required to be given under this Agreement shall be deemed sufficiently given if mailed by certified U.S. mail, return receipt requested, or by overnight courier addressed to the Parties as follows:

If to Client:

To: Public Agency Coalition Enterprise
c/o Keenan & Associates
E. Peter McNamara
2355 Crenshaw Blvd., Ste. 200
Torrance, CA 90501

If to Keenan & Associates:

To: Keenan & Associates
Attn: Legal Department
2355 Crenshaw Blvd., Suite 200
Torrance, CA 90501

With a courtesy copy (not alone sufficient as notice pursuant to this section), mailed and emailed to:

Keenan & Associates
Attn: Danielle Keenan
2355 Crenshaw Blvd., Suite 200
Torrance, CA 90501
Email: dkeenan1@keenan.com

Either Party can change its address for notice with a notice given pursuant to this paragraph.

10.2 Entire Agreement; Amendment. This Agreement contains the entire written agreement of the Parties in connection with the subject matter hereof and supersedes all prior and contemporaneous oral and written agreements, understandings and negotiations. No representations, warranties, inducements, promises or agreements between the Parties not embodied herein shall be of any force or effect unless reduced to writing as an amendment to this Agreement. Any waiver of any rights or failure to act in a specific instance shall relate only to such instance and shall not be construed as an agreement to waive any rights or fail to act in any other instance, whether or not similar.

10.3 Relationship Between the Parties. Neither Party to this Agreement nor any of their respective agents, partners, employees, representatives, or independent contractors shall: (i) be considered an agent, employee, or representative of the other Party for any purpose whatsoever; (ii) have any authority to make any agreement or commitment for the other Party or to incur liability or obligation in the other Party's name or on its behalf; or (iii) represent to third parties that any of them has any right to so bind the other Party hereto. Nothing contained in this Agreement shall be construed or interpreted as creating an agency, partnership or joint venture relationship between the Parties.

10.4 Severability. In the event that any provision of this Agreement shall, for any reason, be held to be invalid or unenforceable in any respect, such invalidity or unenforceability shall not affect any other provision hereof, and this Agreement shall be construed as if such invalid or unenforceable provision had not been included herein. If any provision hereof shall, for any reason, be held by a court to be excessively broad as to duration, geographical scope, activity, or subject matter, it shall be construed by limiting and reducing it to make it enforceable to the extent compatible with applicable law as then in effect.

10.5 Force Majeure. Except for the obligation to make payments, nonperformance of either Party shall be excused to the extent that performance is rendered impossible by strike, fire, flood, governmental acts or orders or restrictions, failure of suppliers, or any other reason where failure to perform is beyond the reasonable control of the non-performing Party.

10.6 Headings. All headings in this Agreement are for convenience only and shall not affect the meaning of any provision hereof.

10.7 Assignments. Client shall not assign, delegate or transfer any or all of its rights and obligations under this Agreement without the express prior written consent of Keenan and the Developer.

10.8 Governing Law; Jurisdiction. This Agreement shall be governed by and construed in accordance with the laws of the State of California. All disputes arising out of this Agreement will be subject to the exclusive jurisdiction of the state and federal courts located in the State of California and each party hereby consents to the personal jurisdiction thereof and agrees to waive any personal jurisdiction defenses thereto.

IN WITNESS WHEREOF, the Parties have entered into this Agreement as of the Execution Date first written above and hereby represent and warrant that the individual signing this Agreement has been duly authorized to do so.

Public Agency Coalition Enterprise (PACE)

By: E. Peter McNamara

Name: E. Peter McNamara

Title: Executive Director

Date: 09/25/2024

Keenan & Associates

By: Jeffrey Mizokawa

Name: Jeffrey Mizokawa

Title: Vice President

Date: 12/5/2024

EXHIBIT A – CUSTOMER ORDER FORM

Keenan



CUSTOMER ORDER FORM

Virgin Pulse Program Services

Order Date:	9/25/24
Distributor:	Keenan
Customer Name:	Public Agency Coalition Enterprise (PACE)
Customer Address:	2355 Crenshaw Blvd., Ste. 200, Torrance, CA 90501
Customer Contact Name:	E. Peter McNamara/Melissa King
Customer Contact Email:	pmcnamara@keenana.com/mking@keenana.com
Customer Contact Phone:	510-508-2959/813-230-1869
Distributor Customer Support Contact Name:	Danielle Keenan / Mariah Caracoza
Distributor Support Contact Email:	dkeenana1@keenana.com / mcaracoza1@keenana.com
Distributor Support Contact Phone:	310-212-0363, ext 2661 / 310-212-0363, ext 3304
Customer Eligible Population:	Full-time employees & early retirees enrolled in PACE medical plans
Customer Initial Services Implementation Target Date:	1/1/25

Services and Fees						
Services	Start Date	Term of Services	Fee Per Unit	Billing Unit	Estimated Units	Estimated Annual Cost
Virgin Pulse Program Subscription:						
Engage	1/1/25	1 year	\$3.15	PEPM	2,656	\$100,397 ¹
Buy-Up Services:						
Total Pop Health Coaching	N/A	N/A	\$250	PPPY	106	\$26,500
Rewards Structure:						
Reward Currency: Rewards Cash – Gold Level (\$100 max/yr)	1/1/25	1 year	\$25/qtr	PPPQ	266 (10%)	\$26,600
Reward Currency: Rewards Cash – Platinum Level (\$100 max/yr)	1/1/25	1 year	\$25/qtr	PPPQ	266 (10%)	\$26,600
Total Estimated Annual Cost						\$180,097
PEPM = Per eligible per month, PP = Per participant, PPPQ = Per participant per quarter, PPPY = Per participant per year, PU = Per Unit, NC = No charge						

¹ **Virgin Pulse Program Subscription Fee:** The Virgin Pulse Program Subscription Fee will be invoiced annually in advance based on the number of Eligible Lives on record in Client's eligibility file at the time of invoice, due and payable to Keenan upon receipt of invoice but no later than thirty (30) days of the date of invoice. The annual fee will be reconciled within 30 days of the end of each contract year, based on the total Eligible Lives for that year, and any additional fee owed will be invoiced by Keenan, due and payable to Keenan upon receipt of invoice but no later than thirty (30) days of the date of invoice; and any excess fee collected by Keenan for the contract year will be refunded to Client within thirty (30) days of reconciliation.

² **Rewards Funding:** Funding for Virgin Pulse Cash rewards will be invoiced by Keenan in advance of each quarter of the contract year, based on projections of the rewards that will be earned by Members during that quarter, due and payable to Keenan upon receipt of invoice but no later than thirty (30) days of the date of invoice. Any balance of rewards funds remaining for each quarter will be applied toward rewards funding for the next quarter. If the rewards earned by Members during a quarter are in excess of the rewards funding collected by Keenan in advance for that quarter, Client will be invoiced by Keenan for the additional amount, due and payable to Keenan upon receipt of invoice but no later than thirty (30) days of the date of invoice. Any excess rewards funds remaining at the end of the contract year will be refunded to Client within sixty (60) days of the end of that contract year.

EXHIBIT B - VIRGIN PULSE PROGRAM SERVICES LIST

Virgin Pulse Wellness Program Services	Engage (Risk Reduction)
Awareness of Health Risk Status	
• Health Check (Health risk assessment) • My Care Checklist • Pulse Check (Recurring surveys of the state of individual's wellbeing)	✓
Digital Support for Building Healthy Routines	
• Wellness platform & mobile app • AI-driven guidance and goal-setting	✓
• 22 43 Journeys (digital educational modules, including tobacco cessation)	✓
• Nutrition Guide	✓
• Sleep Guide	✓
Social Connection	
• Invite up to 10 friends & family to join program • Social groups • Wellness Challenges • "Trophies"	✓
Member Engagement	
• Standard member communications • Announcements • Surveys • Event calendar	✓
Rewards to Motivate and Inspire Change	
• Points and levels rewards • Employer-sponsored rewards	✓
Administrative Features	
• Challenge admin • Survey admin • Reporting dashboard	✓

EXHIBIT C - REWARDS DESIGN

- The rewards design for the PACE Virgin Pulse Program will be a **quarterly** rewards structure, with eligible participants being able to earn a maximum of **\$50 in Rewards Cash per quarter**, with \$25 in Rewards Cash per quarter for reaching Gold Level (8,000 points) and an additional \$25 in Rewards Cash per quarter for reaching Platinum Level (15,000 points).
- The **total maximum annual reward** that can be earned by employee participants is **\$200** (a maximum of \$50 in Rewards Cash per quarter).
- **Rewards Cash** can be redeemed in the Virgin Pulse online store to purchase products or gift cards, or donate to charity organizations.
- A list of **points-earning opportunities** is provided in Exhibit D.

Virgin Pulse Rewards Design Total Maximum <i>Quarterly</i> Reward Per Employee: \$50 in Rewards Cash* Total Maximum <i>Annual</i> Reward Per Employee: \$200 in Rewards Cash*				
Quarterly Levels	Bronze	Silver	Gold	Platinum
Q1 Points Required	500	4,000	8,000	15,000
Reward Value / Message	Rewards Cash: No Reward Great Start!	Rewards Cash: No Reward Keep it Up!	Rewards Cash: \$25 Keep Going!	Rewards Cash: \$25 You Did It!
Q2 Points Required	500	4,000	8,000	15,000
Reward Value / Message	Rewards Cash: No Reward Great Start!	Rewards Cash: No Reward Keep it Up!	Rewards Cash: \$25 Keep Going!	Rewards Cash: \$25 You Did It!
Q3 Points Required	500	4,000	8,000	15,000
Reward Value / Message	Rewards Cash: No Reward Great Start!	Rewards Cash: No Reward Keep it Up!	Rewards Cash: \$25 Keep Going!	Rewards Cash: \$25 You Did It!
Q4 Points Required	500	4,000	8,000	15,000
Reward Value / Message	Rewards Cash: No Reward Great Start!	Rewards Cash: No Reward Keep it Up!	Rewards Cash: \$25 Keep Going!	Rewards Cash: \$25 You Did It!

* Funding for Rewards Cash rewards will be invoiced to PACE as an additional charge.

EXHIBIT D – POINTS EARNING OPPORTUNITIES

Category	Description	Frequency	Notes	Value	
Activity	Take 1,000 steps in a day	Once per day	Max daily earning potential for steps or active/workout minutes is 140 points. System automatically uses highest value (steps, active minutes, OR workout minutes)	10 points	
	Take 2,000 steps in a day			20 points	
	Take 3,000 steps in a day			30 points	
	Take 4,000 steps in a day			40 points	
	Take 5,000 steps in a day			50 points	
	Take 6,000 steps in a day			60 points	
	Take 7,000 steps in a day			70 points	
	Take 8,000 steps in a day			80 points	
	Take 9,000 steps in a day			90 points	
	Take 10,000 steps in a day			100 points	
	Take 11,000 steps in a day			110 points	
	Take 12,000 steps in a day			120 points	
	Take 13,000 steps in a day			130 points	
	Take 14,000 steps in a day			140 points	
	Workout for 15 minutes in a day	Once per day	*Steps, active, and workout minutes must be validated (i.e. from a device) unless reasonable alternative is turned on	70 points	
	Workout for 30 minutes in a day			100 points	
	Workout for 45 minutes in a day			140 points	
	15 Active Minutes in a Day	Once per day		70 points	
	30 Active Minutes in a Day			100 points	
	45 Active Minutes in a Day			140 points	
	Manual Workout Reward 30-59 minutes	Once per day		Entered via healthy habit tracker	30 points
	Manual Workout Reward 60-89 minutes				60 points
Manual Workout Reward >= 90 minutes	100 points				
20-Day Triple Tracker: 7,000 steps/15 active minutes/15 workout minutes	Once per month	Validated steps only unless manually entered steps turned on	400 points		
20-Day Triple Tracker: 10,000 steps/30 active minutes/30 workout minutes			500 points		
Connect first activity device	Once ever		200 points		
Cards	Do your daily cards	2x per day	40 points daily	20 points per card	
	Complete 10 daily cards in a month	Once per month		100 points	
	Complete 20 daily cards in a month			200 points	

Category	Description	Frequency	Notes	Value
Challenges	Creating a personal challenge	Once per month	Personal challenges	50 points
	Join personal challenge			100 points
	Join the Company Challenge		Corporate challenges	100 points
	Create a team in the company challenge and recruit enough players to fill it			50 points
	Post a chat comment at least once a week for all weeks of the challenge			50 points
	Reach final destination in the destination challenge			100 points
	Track steps at least once a week for all weeks of the challenge			100 points
	Unlock a destination in the destination challenge	1x per game		25 points
	Win the promoted healthy habit challenge	Once per month	Supported by Virgin Pulse	200 points
General	Complete a Journey step	Once per day	Journeys	20 points
	Complete a whole Journey	3x per calendar quarter		150 points
	Set Your Interests	Once per calendar quarter		100 points
	Complete Nicotine-Free Agreement	Once per program year		100 points
	Set a wellbeing goal			200 points
	Invite a colleague to join	5x per year	250 points total	50 per referral
Nutrition	Daily calorie tracking	Once per day	Done via MyFitnessPal	20 points
	Track calories 10 days in a month	Once per month	Done via MyFitnessPal	200 points
	Track calories 20 days in a month			300 points
	Connect calorie tracker	Once ever		100 points
Onetime	Add a Profile Picture	Once ever		100 points
	Complete Registration			500 points
	First login to mobile app			250 points
	Add 5 friends			250 points
	Add friend outside your company			100 points

Category	Description	Frequency	Notes	Value
Sleep	Track sleep nightly	Once per day	Validated sleep only (via device)	20 points
	Sleep >7 hours in a night			50 points
	Track sleep manually			10 points
	Track sleep 10 days in a month	Once per month	Validated sleep only (via a device)	100 points
	Track sleep 20 days in a month			200 points
	Sleep >7 hours 20 nights in a month			500 points
Tracking	Track Your Healthy Habits	3x per day	30 points daily	10 points per habit
	Track Healthy Habits 10 days in a month	Once per month		200 points
	Track Healthy Habits 20 days in a month			300 points
	First time tracking healthy habits 5 days in a month	Once ever		100 points
Survey	Complete Health Check Survey	Once per program year	Self-reported HRA survey	1,000 points
Biometric	Complete a Biometric Screening	One per program year	VP PCP Form	1,000 points
Measurements	Self-entered measurements	Once per month	Entered on platform on Stats page	50 points
	Ideal or improved blood pressure			50 points
	Ideal or improved body mass index			50 points
	Ideal or improved fasting glucose	Once per program year	VP PCP Form	50 points
	Ideal or improved non-fasting glucose			50 points
	Ideal or improved A1C			50 points
	Ideal or improved cholesterol (HDL)			50 points
	Ideal or improved cholesterol (LDL)			50 points
	Ideal or improved total cholesterol			50 points
	Ideal or improved body fat levels			50 points
	Ideal or improved triglycerides			50 points
	Ideal or improved waist circumference			50 points
	Certified tobacco free			50 points
My Care Checklist	Complete Annual Health Check-up	Once per program year	Self-reported in My Care Checklist platform tool	250 points
	Complete Flu Shot			250 points
	Complete a Vision Exam			250 points
	Complete Dental Check-up	2x per program year		250/500 points
Participation	Wellness Learning Event	Once per program year	Self-reported in platform via attestation form	250 points
	Community Wellness Event			250 points
	Tobacco Cessation Attestation			500 points
Media	Complete a video or audio experience from your library	4x per month	200 points per month max	50 points

EXHIBIT E – DEFINITION OF SERVICES

VIRGIN PULSE IGNITE

Virgin Pulse Ignite is a total wellbeing solution that supports organizations in building cultures of health. Ignite focuses on positive, sustainable engagement and social connectivity to improve wellbeing, strengthen corporate culture, increase employee engagement and enhance productivity. Ignite supports meaningful daily interactions and healthy habit building with a large library of tools and wellbeing content covering all lifestyle topic areas, and connects employees through individual or team-based challenges that drive collaboration and organizational alignment. Ignite is delivered through a web and mobile (iOS and Android) platform with success services for implementation, ongoing client success, member engagement and member support. The product description below may be updated from time to time to reflect feature changes.

STANDARD PRODUCT CAPABILITIES

Platform Design & Configurations	Branding Client can add its organization's branding to the Virgin Pulse website.
	Personalization Engine Targeted programming and content delivered in an automated fashion to members based on their interests, health risks, & demographics to ensure a personalized experience.
	Incentive Management Framework As members engage in healthy behaviors and participate in differing activities, they have the opportunity to earn Virgin Pulse cash rewards, which they can redeem at the Virgin Pulse online store.
	Integration Framework Ability to integrate specific benefits and programming made available to your population. Configuration of available programs determined by client. Integrate and promote benefits, tools, events, and information to drive awareness, usage and impact both on-platform via web & mobile and off-platform.
Habit Building & Behavior Change Tools	Language Options The platform and mobile app are available in the following languages: US English, UK English, Chinese (Simplified), Chinese (Traditional), French (European), French (Canadian), German, Italian, Japanese, Korean, Malay, Polish, Portuguese (Brazilian), Russian, Spanish (Latin American), Spanish (European), Swedish, Vietnamese, Dutch, Thai, and Hindi.
	Daily trackers, content and activities to help members adopt and maintain healthy daily routines. Healthy Habit Trackers Members self-track health and wellbeing behaviors in key areas: activity, nutrition, learning, sleep, community, relationships, stress, productivity, financial wellbeing, safety, sustainability, diversity,

	inclusion, effectiveness and health conditions. They support successful behavior change by triggering members to make small but daily changes in their lifestyle.
	Daily Health & Wellbeing Tips Members receive personalized daily tip cards based on their selected interests. The cards take a micro-learning and small steps approach to cue healthy actions. The tip cards encompass key areas: activity, nutrition, learning, sleep, community, relationships, stress, productivity, financial wellbeing, safety, sustainability, diversity, inclusion, effectiveness, and health conditions.
	Digital Coaching Virgin Pulse Journeys® are daily, self-guided courses that help employees successfully form and adopt new healthy habits. Each Journey breaks a key behavior or a larger goal into smaller achievable steps, helping people improve their health literacy and form new habits as they go. They cover a variety of lifestyle and health related topics including topics such as, nutrition, stress, finance, tobacco, and diabetes.
	Guides and Resources Personalized plans that provides practical guidance and a framework to adopt healthy habits with tracking tools, resources and tips, & reminders.
	Challenges Corporate and Peer competitions that drive step increases and/or healthy habit development. Also includes promotions and configuration options. Supported challenge types include: destination, staged, basic, charity, spotlight, and healthy habits.
	Social Connections Members can connect with colleagues, leverage a leaderboard to show activity among friends and join groups based on interests. Additionally, members can invite up to 10 Friends & Family to participate in a limited experience.
	Shoutouts An employee and peer recognition tool to facilitate a culture of recognition and appreciation and drive engagement with company values. Available with standard company values (e.g., curiosity, responsibility, teamwork, etc.).
Assessment & Measurement	Tools to help survey the member population as well as help members assess their health status and risks.
	Health Assessment – Health Check Flagship assessment that leverages NCQA-certified content to offer members a fresh look at their lifestyle choices and personal health.
	My Care Checklist Personalized reminders based on data and HEDIS measures to help members stay on top of condition-specific and preventive care actions throughout the year.
	Pulse Check

	Recurring surveys of the member's wellbeing status.
	Surveys Client-built custom surveys that can segmented and deployed through VP platform. Surveys include reporting to help clients take action on the insights provided by their population.

COMMUNICATIONS

Communications	Standard Member Communications Includes launch campaign options with emails, site pop-up, posters, digital displays, info sheets, and leadership kit to support enrollment. Additionally, on-going auto-generated comms are delivered to individuals based on their interactions with the platform via email and/or mobile app.
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MEMBER SERVICES SUPPORT

Online Support	Members may access a knowledgebase of helpful program information and problem resolutions via the Support section of the program site or they may submit questions via the Support form
Member Services	Provides member-level support after launch via phone (888-671-9395) and email (support@virginpulse.com) from 8am-9pm EST, Monday-Friday; and chat 2am-9pm EST, Monday-Friday.

ADMINISTRATIVE RESOURCES

Admin Portal	Web-based management tools are provided for the program administrator (i.e., Keenan Employee Health Management Consultant) to manage and segment components of Client's Virgin Pulse program, including calendar events, to promote events broadly or to specific locations. There is also the ability to configure wellbeing pillars and topics, and create daily cards and healthy habits for the program participants. Lastly, this tool may be used to deploy unlimited Destination, Basic and Healthy Habit challenges chosen from the Virgin Pulse Challenge Theme Library or own custom theme, and configure challenge settings (start/end dates, etc.)
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Program Reporting and Analytics	On-Demand Reporting The program administrator (i.e., Keenan Employee Health Management Consultant) will have 24/7 administrative access to on-demand, self-serve analytics dashboard to configure and access a range of reports, track member engagement, measure outcomes, and tailor content and programming in real-time. Refreshed daily, metrics may be filtered by
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organizational hierarchy, rewards segmentation, and many other attributes, providing all the information necessary to manage diverse populations. Reports can be explored as Excel, CSV, and PowerPoint files for easy viewing and additional analysis.

On-Demand Reporting Dashboards Include:

- Participation
 - o At-a-Glance Executive View
 - o Enrollment
 - o Engagement
- Population risk profile
 - o HRA
 - o Biometrics
- Utilization
 - o Levels and Incentives
 - o Corporate Challenges
 - o External Programs
 - o Topics

The Keenan Employee Health Management Consultant will provide reporting on these metrics to Client upon Client's request.

Self-Serve Data Extracts

Monthly member-level reporting is automatically provided to the program administrator (i.e., Keenan Employee Health Management Consultant) to support internal reporting needs, including:

- Eligibility Report
- Member Activation
- Billable Pulse Cash Earned Report
- Coaching Month End

The Keenan Employee Health Management Consultant will provide reporting on these metrics to Client upon Client's request.

Standard Data Extracts

Monthly member-level reporting available from Keenan Employee Health Management Consultant upon request. Delivered for current reported month and in standard file format only. Keenan Employee Health Management Consultant will work with Client to determine applicable reports and cadence.

- Challenge Activity
- Healthy Habit Tracking
- Levels & Points
- Activity Completed

- Aggregated Rewards Trigger
- Reward and Incentive
- Drawing File
- Billable Cash
- Tobacco Cessation

The Keenan Employee Health Management Consultant will provide reporting on these metrics to Client upon Client's request.

IMPLEMENTATION SERVICES

Program Implementation

Client will have a designated Keenan Employee Health Management Consultant and Virgin Pulse Implementation Project Manager who are responsible for facilitating and coordinating execution of program launch, including:

- Configuration and QA of Virgin Pulse platform and client's program design
- Setup of applicable reward redemption options and ecommerce store
- Coordination, setup, and testing of file integrations with client's 3rd party vendors
- Coordination of device fulfillment & logistics (if applicable)

OPTIONAL PROFESSIONAL SERVICES (ADDITIONAL FEES APPLY)

Biometric Screening Services	Biometric screening provided by VP's screening partner, including: • Height/Weight/Body Mass Index (BMI) • Blood pressure • Blood glucose • Total cholesterol • LDL cholesterol • HDL cholesterol These services will be provided by through a separate agreement between Client and the screening vendor.
Inbound Single Sign-On Connection	Identity Provider (IdP) initiated SAML 2.0 SSO implementation
Outbound Single Sign-On Connection	SAML 2.0 SSO implementation from Virgin Pulse platform to client's third-party partner for authentication purposes (passing unique member ID and company identifier in token).
Custom Data Integration	Development of data integrations with 3 rd parties as requested by client.

Mariana Torres Hernandez

From: Melissa King
Sent: Wednesday, December 4, 2024 10:03 AM
To: Everett McNamara; Teri Graf
Cc: Mariana Torres Hernandez
Subject: RE: PACE Anthem - CAA Gag Clause Reporting
Attachments: FI-ASO_gag clause_client email template.PDF

Mariana, just bumping this item to be included in correspondence.

Thank you!

Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Everett McNamara <pmcnamara@Keenan.com>
Sent: Thursday, November 7, 2024 11:49 AM
To: Melissa King <mking@keen.com>; Teri Graf <tgraf@keen.com>
Cc: Mariana Torres Hernandez <mhernandez@keen.com>
Subject: FW: PACE Anthem - CAA Gag Clause Reporting

All,

Let's include these responses from carriers in the correspondence for the December meeting.

Peter

[Click here](#) to book a meeting with me!

Keenan®



E Peter McNamara, MBA

Senior Vice President
CA License #0A94087
Municipalities - Accretive Stop Loss Solutions

o: 510-986-6761 ext: 8130 | c: 510-508-2959 | f: 510-986-0440
e: pmcnamara@keen.com

From: Reddick, Darren <Darren.Reddick@anthem.com>
Sent: Wednesday, November 6, 2024 3:25 PM
To: Melissa King <mking@keen.com>
Cc: Everett McNamara <pmcnamara@Keenan.com>; Teri Graf <tgraf@keen.com>
Subject: RE: PACE Anthem - CAA Gag Clause Reporting

Hi Melissa,

Group health plans and issuers must submit an attestation by December 31 each year to confirm compliance with the restriction on gag clauses.

For 2024 and future attestation submissions, an ASO opt-in survey will no longer be needed. Anthem will attest on behalf of its FI & ASO clients for the business and information that it administers and maintains.

Here's how we'll communicate the compliance requirements to our clients:

- **For ASO and Fully Insured groups (including Minimum Premium MEWA, ABF and FEHB),** we're filing the Gag Clause Prohibition Compliance Attestation on their behalf by the December 31, 2024, deadline. In our communication to ASO and FI clients, we will provide them with confirmation of compliance for the business and information that we administer and maintain.

External communications took place in June and will again in December

- **Broker/Consultant:** June 18 through Broker Hub, the Broker Plus app, Producer Toolbox, and Anthem Consultant Hub.
- **Local LG & SG employer:** June 20 through a marketing email.

When the gag clause attestation submission is complete, we'll publish an article in EmployerAccess Latest News to let clients know. We'll also let brokers/consultant know through the Broker Hub, the Broker Plus app, Producer Toolbox, and Anthem Consultant Hub channels.

Attached is a sample of the client email.

Thank you,



Darren Reddick
CA License #0B31077
Strategic Account Executive, Anthem Blue Cross
3080 Bristol Street, 2nd Floor, Costa Mesa, CA, 92626
Phone: 949-803-4621
darren.reddick@anthem.com

From: Melissa King <mking@keenan.com>
Sent: Wednesday, November 6, 2024, 3:03 PM
To: Reddick, Darren <Darren.Reddick@anthem.com>
Cc: Everett McNamara <pmcnamara@Keenan.com>; Teri Graf <tgraf@keenan.com>
Subject: {EXTERNAL} PACE Anthem - CAA Gag Clause Reporting

Hi Darren,

Last year Anthem completed the Gag Clause reporting on behalf of both fully-insured and self-funded PACE medical plans.

Is this something that Anthem can complete again this year for PACE? I'm not locating a notification or emails regarding requesting that Anthem complete earlier this year, as we received last year.

Appreciate the guidance!

Keenan®



Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176 | c: 813-230-1869 | f: 310-328-6793
e: mking@keenan.com

Keenan & Associates | CA License #0451271 | 2355 Crenshaw Blvd., Suite 200, Torrance, CA 90501

Exceptional customer service is a top priority at Keenan. If there is anything I can do to improve your experience or if you would like to provide feedback, please feel free to contact my Manager, Laurie Lofranco llofranco@keenan.com.

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Client Email Template – After June 18, National Accounts should copy/paste the email below and send to FI and ASO clients.

Note, this same message will be sent to Local LG and SG via marketing email on June 20.

Subject: CAA gag clause compliance requirements

Body Copy

The [Consolidated Appropriations Act \(CAA\) gag clause provision](#) prohibits group health plans and health insurance issuers offering group health insurance coverage from entering into an agreement between a plan or issuer and a healthcare provider, network or association of providers, third-party administrator, or another service provider offering access to a network of providers that would directly or indirectly restrict a plan or issuer from disclosing or accessing certain price and quality information.

Group health plans and issuers are required to submit an attestation each year to confirm compliance with the prohibition on gag clauses.

We're filing the Gag Clause Prohibition Compliance Attestation on your behalf by the annual deadline of December 31. For your reference, we are providing you with this confirmation of compliance for the business and information that we administer and maintain.

Anthem represents that the administrative services provided under its Administrative Services agreements are consistent with the requirements set forth in Section 201 of the Consolidated Appropriations Act, 2021.

There is no action required of you. However, if you receive an inquiry from CMS regarding the Gag Clause Prohibition Compliance Attestation, or have any questions, please contact your account management team.

Mariana Torres Hernandez

From: Melissa King
Sent: Wednesday, December 4, 2024 10:04 AM
To: Mariana Torres Hernandez
Cc: Teri Graf; Everett McNamara
Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Follow Up Flag: Follow up
Flag Status: Flagged

Hi Mariana,

Here is the Gag Clause confirmation details that we would like to include in correspondence from Kaiser.

Thank you!

Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Melissa King <mking@keenan.com>
Sent: Wednesday, November 6, 2024 6:17 PM
To: Andrea C Maciel <Andrea.Maciel@kp.org>; Deloris J Palmer <Deloris.J.Palmer@kp.org>
Cc: Teri Graf <tgraf@keenan.com>; Everett McNamara <pmcnamara@Keenan.com>
Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Thank you!

Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Andrea C Maciel <Andrea.Maciel@kp.org>
Sent: Wednesday, November 6, 2024 6:16 PM
To: Melissa King <mking@keenan.com>; Deloris J Palmer <Deloris.J.Palmer@kp.org>
Cc: Teri Graf <tgraf@keenan.com>; Everett McNamara <pmcnamara@Keenan.com>
Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Hello Melissa,

Please the most current update below.

Kaiser Foundation Health Plan, Inc. (KFHP) and Kaiser Permanente Insurance Company (KPIC) have amended their contracts, when necessary, to allow for the sharing of cost and quality information as well as de-identified claims and encounter information to the extent permitted by applicable law (and the sharing of such information with business associates).

All required submissions of the attestation confirming compliance with the Gag Clause Prohibition to the Centers for Medicare and Medicaid Services (CMS) for the period beginning December 27, 2020, through December 31, 2023, as required under section 201 of the Consolidated Appropriations Act (CAA), 2021 occurred on December 28, 2023. The attestations were made on behalf of all fully insured and self-funded employer groups with KFHP and KPIC health plan coverage during this period.

Kaiser Foundation Health Plan, Inc. (KFHP) and Kaiser Permanente Insurance Company (KPIC) will continue to submit annual attestations to CMS for 2024 and subsequent years.

Sincerely,

Andrea Maciel

Senior Account Manager
CA License #0E07891

Kaiser Permanente

Account Management
(669) 251-3078 (cell)

Based on law in each state we do business, the producer who is presenting the quote to the group and/or discussing KP rates and benefits, and/or placing the coverage must be licensed in each state for which KP is providing a quote. KP cannot pay commissions to any broker without a license and appointment. Please advise as soon as you are licensed and KP will work to make the appointment.

From: Melissa King <mking@keenan.com>

Sent: Wednesday, November 6, 2024 3:05 PM

To: Andrea C Maciel <Andrea.Maciel@kp.org>; Deloris J Palmer <Deloris.J.Palmer@kp.org>

Cc: Teri Graf <tgraf@keenan.com>; pmcnamara (keenan.com) <pmcnamara@keenan.com>

Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Hi Andrea,

Reaching out to confirm that Kaiser will be continuing to report on behalf of PACE.

Thanks!

Melissa King, MBA

Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Melissa King
Sent: Wednesday, October 4, 2023 3:21 PM
To: Andrea C Maciel <Andrea.Maciel@kp.org>; Deloris J. Palmer <Deloris.J.Palmer@kp.org>
Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Thanks Andrea!

Melissa King, MBA
Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Andrea C Maciel <Andrea.Maciel@kp.org>
Sent: Wednesday, October 4, 2023 3:04 PM
To: Melissa King <mking@keenan.com>; Deloris J. Palmer <Deloris.J.Palmer@kp.org>
Subject: RE: Gag Clause Attestation Due by December 31, 2023 - AP blog

Hello Melissa,

Kaiser Permanente plans to submit the required gag clause prohibition compliance attestation on behalf of fully insured and self-funded employer groups on or before the deadline of 12/31/2023.

At this time, employer groups do not need to provide any information or perform any action for Kaiser Permanente.

Let me know if you have any other questions.

Sincerely,

Andrea Maciel
Senior Account Manager
CA License #0E07891

Kaiser Permanente
Account Management
(669) 251-3078 (cell)



October 17th - [Educator Exclusive: How to prevent burnout](#)
October 18th - [Championing Women's Health at Work webinar](#)

From: Melissa King <mking@keenan.com>
Sent: Wednesday, October 4, 2023 11:42 AM

To: Andrea C Maciel <Andrea.Maciel@kp.org>; Deloris J. Palmer <Deloris.J.Palmer@kp.org>

Subject: FW: Gag Clause Attestation Due by December 31, 2023 - AP blog

Caution: This email came from outside Kaiser Permanente. Do not open attachments or click on links if you do not recognize the sender.

Hi Andrea and Deloris,

Just wanted to confirm if Kaiser is completing the Gag Clause Attestation for our PACE Kaiser plans?

Thanks!

Melissa King, MBA

Sales Executive

CA License #4218278

o: 310-212-0363 ext: 1176

c: 813-230-1869

From: AssuredPartners Employee Benefits <Employeebenefits@assuredpartners.com>

Sent: Wednesday, October 4, 2023 5:00 AM

To: Nancy Schott <nschott@Keenan.com>

Subject: Gag Clause Attestation Due by December 31, 2023



Gag Clause Attestation Due by December 31, 2023

10/3/2023

The deadline for group health plans to submit their first online [Gag Clause Prohibition Compliance Attestation](#) (GCPCA) form is quickly approaching. Employers should familiarize themselves with the gag clause requirement, understand what health benefits it applies to, know what actions they need to take, and submit a GCPCA by December 31, 2023 (if necessary).

The extent of an employer's responsibilities will largely depend on the willingness of their medical carrier or TPA to complete the attestation for the plan, and whether any medical benefits (like pharmacy or behavioral health) are administered by a vendor other than their medical carrier or TPA...



[Read the Full Blog](#)



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Orlando, FL 32801

www.assuredpartners.com

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Mariana Torres Hernandez

From: Jenny Irvine <jenny@wellsteps.com>
Sent: Monday, November 25, 2024 5:57 AM
To: Robin Rager1
Cc: Kim James
Subject: WellSteps Gag Clause Compliance-PACE -Response

Hello Robin,

WellSteps confirms that our wellness program complies with the Gag Clause Prohibition as outlined. Specifically, our program does not directly or indirectly restrict the plan from:

1. Providing provider-specific cost or quality of care information or data to plan sponsors, participants, beneficiaries, enrollees, or individuals eligible for plan enrollment through any means.
2. Electronically accessing de-identified claims and encounter information or data for participants, beneficiaries, or enrollees, including financial information, provider details, service codes, or other claim-related data, upon request and consistent with federal healthcare privacy regulations.
3. Sharing or directing the sharing of such information or data with a business associate in compliance with federal healthcare privacy regulations.

Our wellness program operates independently of these processes and does not interfere with the plan's ability to meet its obligations under the Gag Clause Prohibition.

Please let me know if you need any additional confirmation.



Jenny Irvine

Chief Executive Officer

Email: jenny@wellsteps.com

Phone: [385-325-0081](tel:385-325-0081)



[Download Brochure](#)

Mariana Torres Hernandez

From: Andrea C Maciel <Andrea.Maciel@kp.org>
Sent: Friday, November 1, 2024 10:55 AM
To: Melissa King
Cc: Deloris J Palmer; Everett McNamara
Subject: RE: Coverage changes for GLP-1 drugs and Anti-Obesity Medications for 2025
Attachments: GLP-1 Utilization Dashboard (1).pdf

Hi Melissa,

Yes, I'm happy to share more detailed reporting once available. In the meantime, I can send you the new GLP-1 dashboard we have available. There 6 GLP-1 scripts for the group but only 5 display in the report. Through August 2024, the total paid PMPM is \$8.20 and RX/1000 is 137.7. The report is for all PACE contracts combined, total of 1,525 members.

Note, the report does not indicate if the drug is for weight loss only, but this might be available in the future.

Sincerely,

Andrea Maciel

Senior Account Manager
CA License #0E07891

Kaiser Permanente

Account Management
(669) 251-3078 (cell)

Based on law in each state we do business, the producer who is presenting the quote to the group and/or discussing KP rates and benefits, and/or placing the coverage must be licensed in each state for which KP is providing a quote. KP cannot pay commissions to any broker without a license and appointment. Please advise as soon as you are licensed and KP will work to make the appointment.

From: Melissa King <mking@keenan.com>
Sent: Friday, November 1, 2024 7:57 AM
To: Andrea C Maciel <Andrea.Maciel@kp.org>
Cc: Deloris J Palmer <Deloris.J.Palmer@kp.org>; pmcnamara (keenan.com) <pmcnamara@keenan.com>
Subject: FW: Coverage changes for GLP-1 drugs and Anti-Obesity Medications for 2025

Hi Andrea,

Once member impact reporting is available for PACE on the GLP-1 Rx prescribing eligibility changes, would you be able to share?

Thank you!

Melissa King, MBA

Sales Executive
CA License #4218278

o: 310-212-0363 ext: 1176
c: 813-230-1869

From: Michelle R Dubois <Michelle.RG.Dubois@kp.org>
Sent: Wednesday, October 30, 2024 7:25 PM
To: Megan Gardner <mgardner@keenan.com>; Teri Graf <tgraf@keenan.com>; Paul Makowski <paul.makowski@lacity.org>
Cc: Chuong Tran <chuong.tran@lacity.org>; Daniel Powell <daniel.powell@lacity.org>; Andrew Torres <andrew.j.torres@lacity.org>; Bordan Darm <bdarm@keenan.com>; Melissa King <mking@keenan.com>; Erin Robinson <erobinson@Keenan.com>; Marcia Cardenas <Marcia.X.Cardenas@kp.org>; Jennifer Barroll <Jennifer.Barroll@kp.org>; Leslie C Salvador Orellana <Leslie.C.SalvadorOrellana@kp.org>; Jasmin T Esquivel <Jasmin.T.Esquivel@kp.org>; Tom Edwards <tedwards@Keenan.com>
Subject: RE: Coverage changes for GLP-1 drugs and Anti-Obesity Medications for 2025

Megan,

For clarity, the question is for weight loss only not for any underlying conditions?

If the question is for purely weight loss, there are still other factors that must come into play.

There may be instances when GLP-1 medications may be clinically appropriate to reach greater health outcomes in weight management. However, they are just one part of our comprehensive approach to weight management.

In supporting an individual's weight management journey, Kaiser Permanente takes an established healthy lifestyle approach in which the physician, care team, specialists, and the member are a team creating a personalized, integrated, and evidence-based treatment that connects their physical, mental, and social health. o Other providers rely on a fragmented care delivery system that requires point solutions to fully manage obesity. o For nearly 80 years, Kaiser Permanente has pioneered comprehensive whole-person care to support weight management.

Before considering prescribing GLP-1 medications, the physician will carefully review the member's medical history to understand how weight has impacted their health, what solutions have been explored before, and then engage the member to understand where they are in their weight-loss journey today.

Together, the physician and member create a sustainable treatment plan that overcomes barriers to a healthy lifestyle and addresses behavior changes, psychosocial support, and socioeconomic stressors. Plans may include healthy diet, increased exercise, surgery, psychological support, and at times, medications.

If a physician determines that a medication might help a member achieve a healthy lifestyle, before prescribing GLP-1 medications, they often start with the weight loss medications on which we have the most data. These weight loss medications are safe, and we have decades of data to support their effectiveness.

I am providing the information above because there are a lot of facets to the question of coverage. It would depend on the diagnosis, and the treatment plan. Especially, if there are other factors that are considered beyond just weight loss.

At any time, a KP member has the ability to view the KP formulary. The formulary is made available publicly on kp.org/formulary so that both members and interested parties can see what medications are included.

Currently, we provide a standard weight loss rider. Could the offering change, and provide options? We will have more information in the coming year.

Best Regards,

Michelle

Michelle Dubois
License #0B30240
Senior Executive Account Manager
Strategic Accounts – Public Sector South
Kaiser Permanente

Please note my email address has changed as of September 2, 2024: michelle.rg.dubois@kp.org

Emails forwarded from my previous email will discontinue as of January 1, 2025

Mobile: 747-333-7706
SR Client Service Manager Contact – Marcia Cardenas, marcia.x.cardenas@kp.org

Please note upcoming PTO:
December 12- 27, 2024

Holiday Schedule:
Labor Day: September 2, 2024
Thanksgiving: November 28, 2024
Christmas: December 25, 2024
New Year's Day: January 1, 2025

Based on law in each state we do business, the producer who is presenting the quote to the group and/or discussing KP rates and benefits, and/or placing the coverage must be licensed in each state for which KP is providing a quote. KP cannot pay commissions to any broker without a license and appointment. Please advise as soon as you are licensed and KP will work to make the appointment.

GLP-1 Utilization Dashboard

Data Posted Through : 08-31-2024

Rolling Period includes [Sep21-Aug22, Sep22-Aug23, Sep23-Aug24]
Enterprise includes [All]
Group includes [NC00600400 - PACE/TOWN OF DANVILLE, NC00600705 - PACE/SUPERIOR COURT OF CALIFORNIA - COUNTY OF EL D, NC00604244 - PACE/REGIONAL GOVERNMENT SERVICES, N...]

INFORMATION

Dashboard Information

Use this dashboard to illustrate year-over-year trends in GLP-1 drug utilization. The data in this dashboard can be used to identify:

- The three-year trend of GLP-1 drug cost and utilization.
- How the population compares to regional and industry benchmarks.
- The top 5 GLP-1 drugs for the population, including PMPMs and Prescriptions/1000.

The dashboard defaults to include the last 3 rolling (12-month) periods and metrics as described.

Dashboard Includes

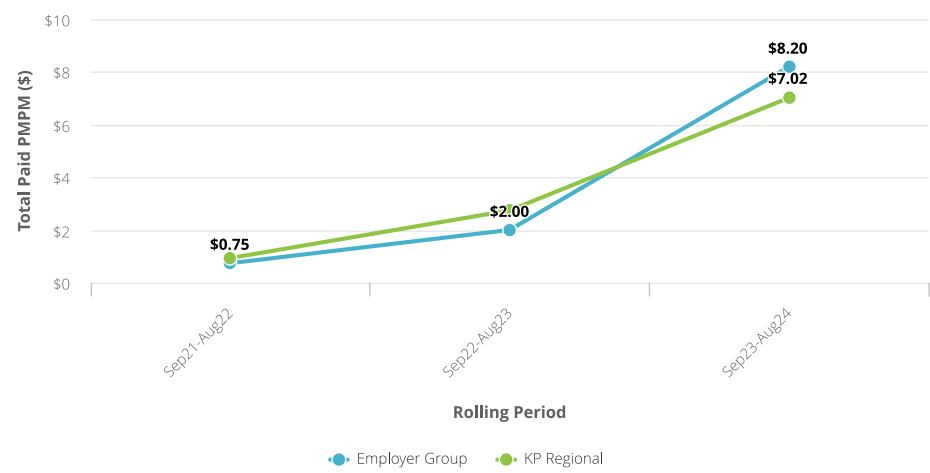
The data in this dashboard represents the list of GLP-1 drugs approved by the U.S. Food and Drug Administration (FDA) and available in the market. This list will be updated as new drugs are added and approved for use. The current list of GLP-1 drugs includes Mounjaro, Trulicity, Ozempic, Wegovy, Victoza, Rybelsus, Byetta, Bydureon, Xultophy, Saxdena, Soliqua, Adlyxin, and Zepbound. These drugs are prescribed and are intended for patients with diabetes, and instances when GLP-1 drugs may be clinically appropriate to reach greater health outcomes for weight loss, or other comorbidities.

Usage Notes

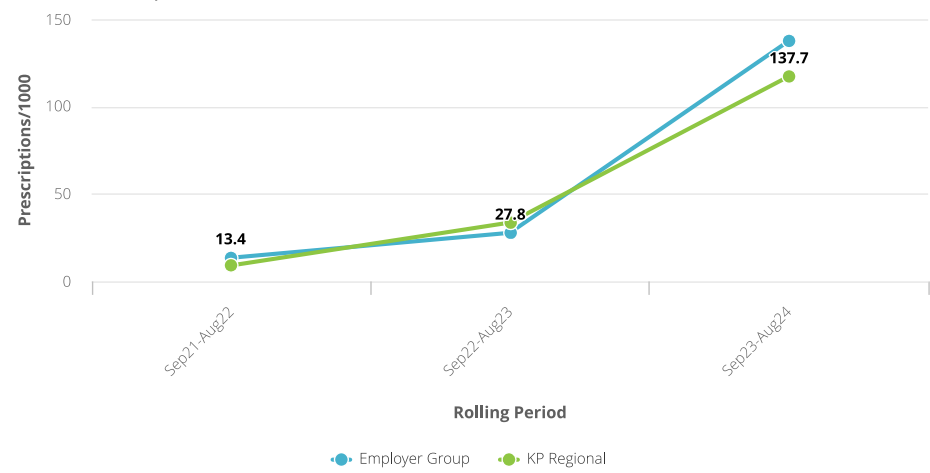
- The list of GLP-1 drugs is expected to change over time. There may be differences when comparing the data to prior results.
- Top drugs are sorted by highest Total Paid PMPM in the most recent period.
- Other metrics can be added or changed as appropriate to answer specific questions.
- The data in this dashboard should not be used alone, or in combination with other data to determine the clinical driver (e.g., diabetes, obesity, obesity with co-morbidities, or weight loss) of the prescription.

GLP-1 UTILIZATION DASHBOARD

GLP-1 Paid PMPM



GLP-1 Prescriptions/1000



Top 5 GLP-1 Drugs

	Sep21-Aug22		Sep22-Aug23		Sep23-Aug24	
Drug Name	Total Paid PMPM	Prescriptions/1000	Total Paid PMPM	Prescriptions/1000	Total Paid PMPM ↓	Prescriptions/1000
OZEMPIC 0.25 MG OR 0.5MG (2 MG/3 ML) PNIJ			\$0.71	11.8	\$4.04	67.3
OZEMPIC 1 MG/DOSE(4 MG/3 ML) PNIJ			\$0.40	4.3	\$2.28	37.8
OZEMPIC 2 MG/DOSE(8 MG/3 ML) PNIJ					\$1.53	25.7
VICTOZA 2-PAK 0.6 MG/0.1 ML(18 MG/3 ML) PNIJ	\$0.58	11.2	\$0.21	4.3	\$0.36	6.8
OZEMPIC 0.25 MG OR 0.5MG(2 MG/1.5 ML) PNIJ	\$0.07	1.1	\$0.68	7.5		
Total : Selected Filter(s)	\$0.66	12.3	\$2.00	27.8	\$8.20	137.7
Total : All	\$0.75	13.4	\$2.00	27.8	\$8.20	137.7

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Monthly Financial Report

ITEM #: 2024-021

Handout: Yes

Category: Financial

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

SETECH provides financial reporting services for PACE.

STATUS:

The Board will hear a review on the Monthly Financial Report as of October 31, 2023.

RECOMMENDATIONS:

For review, discussion, and action as necessary.



FINANCIAL REPORT

FOR THE TWO MONTHS ENDED OCTOBER 31, 2024

As mandated by Section 53646 of the California Government Code, Public Agency Coalition Enterprise (PACE) is able to meet its pool's expenditure requirements for the next six months. PACE does not hold six months of cash flow in reserve. However, monthly member contributions are adequate to meet the monthly cash flow requirements.

Officer

PACE pools the claims experience of all member districts in all health and welfare pools. Operating as a blind pool, individual district claims experience is not available.

Prepared by:



Innovative Solutions. Enduring Principles.

2355 Crenshaw Blvd., Suite 200
Torrance, CA 90501
(310) 212-3344 / (310) 212-0300 Fax
License No. 0451271



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This financial management information report (Report) prepared by Service Enhancement Technologies (SETECH), a Division of Keenan & Associates, is intended solely for internal use by the Authority's Officers, Board Members, Advisory Committee Members, and for internal decision making purposes only in regards to the Authority's insurance program.

SETECH makes no representations or warranties regarding the use of this Report for any other purpose other than for the Authority's insurance program. The official version of the Report is finalized only upon approval by the Authority's Board of Directors and/or Advisory Committee in accordance with the Authority's Agreement and Bylaws following presentation by SETECH or Keenan & Associates. We understand that members may wish to provide a copy of this Report to auditors and regulatory authorities on the conditions that:

- A) The official approved Report is used,
- B) The entire Report be distributed rather than any excerpts,
- C) All recipients be made aware that a SETECH staff member is available to answer any questions regarding the contents of the Report,
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SETECH may utilize actuarial projections as an integral component of this Report, as provided by the Authority's actuary and in the case of some Benefit Groups, by a staff member of the Keenan & Associates Technical Department. We may also rely upon financial data provided by the Authority's Treasurer, Accountant or County Office of Education. We have not audited this data and are not responsible for its accuracy. With any financial analysis, the accuracy and relevance of the conclusions as well as the reasonableness of the recommendations depend upon the accuracy and relevance of the underlying data. Financial information provided in this Report is subject to an annual independent financial audit.

SETECH strives to maintain the strictest confidentiality of any information for our clients. The pages of this Report indicate that the information contained in the Report is for "Client Confidential Use Only." This indicates that SETECH will only disclose information contained in these Reports to our intended clients, their members or their contracted parties.

Public Agency Coalition Enterprise
PACE
Financial Report
As of And For the Two Months Ended 10/31/2024

Cash Transactions					(1)	%
09/01/2024 - 10/31/2024	01/01/2024 - 08/31/2024	Accruals	Balance Year To Date		Final Budget 2024	of Budget
Audited, Total Net Position as of 12/31/2023:						
		Undesignated	8,103,094			
		Designated - Wellness Funds	8,700			
		Total Net Position	\$ 8,111,794			
Operating Revenue						
Member Contributions						
Kaiser	\$ 2,045,236	\$ 8,095,490	\$ 12,210	\$ 10,152,936	\$ 13,562,831	74.86 %
Anthem - HMO	947,453	3,657,577	--	4,605,030	5,611,364	82.07
Anthem - Self Funded	4,381,921	17,771,660	100,226	22,253,807	28,681,453	77.59
EmpiRx Rebates	--	128,568	257,568	386,136	--	--
Stop Loss Reimbursement	993,738	591,811	--	1,585,549	--	--
Total Operating Revenues	8,368,348	30,245,106	370,004	38,983,458	47,855,648	81.46
Operating Expenditure						
Premium						
Kaiser	1,016,680	8,066,705	1,033,406	10,116,791	13,312,803	75.99
Anthem - HMO	909,855	3,502,653	--	4,412,508	5,507,919	80.11
Claims						
Anthem	3,890,530	14,400,437	648,569	18,939,536	19,468,700	97.28
EmpiRx	742,106	2,292,649	277,053	3,311,808	3,939,279	84.07
Administration	324,935	1,105,876	155,976	1,586,787	1,830,903	86.67
Wellness Program	8,268	24,892	210	33,370	113,355	29.44
Stop Loss	571,611	2,449,440	(15,397)	3,005,654	3,677,689	81.73
Professional Development	--	1,900	--	1,900	5,000	38.00
Total Operating Expenditures	7,463,985	31,844,552	2,099,817	41,408,354	47,855,648	86.53
Other:						
Change in Claim Liabilities	--	--	625,550	625,550	--	--
Total Other	--	--	625,550	625,550	--	--
Total Operating Expenditures	7,463,985	31,844,552	2,725,367	42,033,904	47,855,648	87.83
Net Income/(Loss) from Operations	904,363	(1,599,446)	(2,355,363)	(3,050,446)	--	--
Non Operating Revenue/(Expenditure)						
Late Fees	--	3,979	17,211	21,190	--	--
Investment Income	83,377	421,105	22	504,504	577,952	87.29
Total Non Operating Revs/Exps	83,377	425,084	17,233	525,694	577,952	90.96 %
Net Increase/(Decrease)	\$ 987,740	\$ (1,174,362)	\$ (2,338,130)	(2,524,752)		
		Undesignated	5,578,342			
		Designated - Wellness Funds	58,700			
		Unaudited, Total Net Position, 10/31/2024	\$ 5,637,042			

(1) Budget as approved at the May 29, 2024 Executive Committee & Full Board Meetings.

Public Agency Coalition Enterprise
PACE
Statement of Net Position
As of 12/31/2023 and 10/31/2024

	Audited Balance 12/31/2023	Activity 01/01/2024 Through 10/31/2024	Unaudited Balance 10/31/2024
ASSETS:			
Current Assets			
U.S. Bank Checking	\$ 1,294,975	\$ 637,402	\$ 1,932,377
Local Agency Investment Fund (L.A.I.F)	5,293	302	5,595
California Asset Management Program (C.A.M.P)	10,025,494	(602,270)	9,423,224
Subtotal Cash and Cash Equivalents	<u>11,325,762</u>	<u>35,434</u>	<u>11,361,196</u>
Interest Receivable	117	(95)	22
Member Contribution Receivable	127,934	19,597	147,531
Rebate/Reimbursement Receivable	784,364	(461,399)	322,965
Prepaid Expenses	- -	5,302	5,302
Subtotal Current Assets	<u>912,415</u>	<u>(436,595)</u>	<u>475,820</u>
Total Assets	<u>12,238,177</u>	<u>(401,161)</u>	<u>11,837,016</u>
LIABILITIES:			
Current Liabilities			
Accounts Payable	891,666	1,271,440	2,163,106
Unearned Revenue	723,567	176,601	900,168
Subtotal	<u>1,615,233</u>	<u>1,448,041</u>	<u>3,063,274</u>
Claim Liabilities - Anthem	2,511,150	625,550	3,136,700 (1)
Subtotal	<u>2,511,150</u>	<u>625,550</u>	<u>3,136,700</u>
Total Liabilities	<u>4,126,383</u>	<u>2,073,591</u>	<u>6,199,974</u>
Net Position:			
Undesignated - Net Position	8,103,094	(2,491,382)	5,611,712
Designated - Wellness Funds	8,700	16,630	25,330
Total Net Position	<u>8,111,794</u>	<u>(2,474,752)</u>	<u>5,637,042</u>
Total Liabilities and Net Position	<u>\$ 12,238,177</u>	<u>\$ (401,161)</u>	<u>\$ 11,837,016</u>

(1) Claim Liabilities as of 10/31/2024.

Public Agency Coalition Enterprise
PACE
Summary of Cash Flow 2024
Actuals as of 10/31/2024 and Projected through 12/31/2024

	Actuals										Projected		Total	(1)			
											As of		As of	Final			
	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	10/31/2024	Nov-24	Dec-24	12/31/2024	Budget		
Beginning Cash Balance																	
As of 12/31/2023	\$ 11,325,762										\$ 11,325,762			\$ 11,325,762			
Monthly Cash Balance		\$ 13,131,270	\$ 13,344,942	\$ 13,052,237	\$ 12,801,342	\$ 11,973,823	\$ 11,430,791	\$ 11,614,635	\$ 10,057,351	\$ 9,830,289		\$ 11,361,196	\$ 9,254,202				
Inflow:																	
Member Contributions																	
Kaiser	\$ 963,432	\$ 949,328	\$ 971,009	\$ 1,074,085	\$ 1,037,896	\$ 1,028,095	\$ 1,034,832	\$ 1,036,813	\$ 951,590	\$ 1,093,646	\$ 10,140,726	\$ 1,014,073	\$ 1,014,073	\$ 12,168,872	\$ 13,562,831		
Anthem - HMO	421,456	417,537	453,948	465,615	473,870	482,391	469,655	473,105	481,780	465,673	4,605,030	460,503	460,503	5,526,036	5,611,364		
Anthem - Self Funded	2,204,321	2,193,402	2,127,981	2,359,421	2,242,645	2,187,988	2,157,480	2,298,422	2,032,615	2,349,306	22,153,581	2,215,358	2,215,358	26,584,297	28,681,453		
EmpiRx Rebates	--	--	--	--	--	--	--	128,568	--	--	128,568	128,864	--	257,432	--		
Stop Loss Reimbursement	--	--	--	202,055	44,048	99,634	126,434	119,640	679,361	314,377	1,585,549	50	--	1,585,599	--		
Unearned Revenue - 2023	(723,567)	--	--	--	--	--	--	--	--	--	(723,567)	--	--	(723,567)	--		
Unearned Revenue - 2024	680,865	(184,710)	615,133	(87,453)	200,327	(732,857)	330,461	(224,564)	89,652	213,314	900,168	(900,168)	--	--	--		
Late Fee	--	--	--	--	3,979	--	--	--	--	--	3,979	--	--	3,979	--		
Investment Income	52,064	55,148	57,860	52,900	55,651	50,209	51,515	45,757	41,570	41,807	504,481	50,448	50,448	605,377	577,952		
Prepaid Expense	--	(26,509)	2,651	2,651	2,651	2,651	2,651	2,651	2,651	2,650	(5,302)	2,651	2,651	--	--		
Interest Receivable	117	--	--	--	--	--	--	--	--	--	117	--	--	117	--		
Accounts Receivable	589,366	53,888	--	4,845	--	1,567	265,561	--	--	7,840	923,067	--	--	923,067	--		
Total Deposits and Credits	4,188,054	3,458,084	4,228,582	4,074,119	4,061,067	3,119,678	4,438,589	3,880,392	4,279,219	4,488,613	40,216,397	2,971,779	3,743,033	46,931,209	48,433,600		
Outflow:																	
Premium																	
Kaiser	--	(960,017)	(945,908)	(1,006,699)	(2,065,401)	(1,024,435)	(1,031,117)	(1,033,128)	(1,016,680)	--	(9,083,385)	(2,059,764)	(1,026,358)	(12,169,507)	(13,312,803)		
Anthem - HMO	(129,395)	(664,672)	(433,914)	(444,020)	(452,177)	(467,844)	(456,831)	(453,800)	(454,488)	(455,367)	(4,412,508)	(453,786)	(441,251)	(5,307,545)	(5,507,919)		
Anthem - Claims	(1,120,315)	(1,273,714)	(1,817,130)	(2,107,497)	(1,612,560)	(1,333,966)	(2,002,874)	(3,132,381)	(2,198,920)	(1,691,610)	(18,290,967)	(1,829,097)	(1,829,097)	(21,949,161)	(19,468,700)		
EmpiRx - Claims	(133,628)	(281,762)	(308,175)	(270,060)	(303,612)	(353,926)	(279,609)	(361,877)	(366,776)	(375,330)	(3,034,755)	(303,476)	(303,476)	(3,641,707)	(3,939,279)		
Administration	(2,962)	(7,572)	(281,790)	(187,671)	(147,700)	(169,487)	(162,963)	(145,729)	(157,585)	(167,352)	(1,430,811)	(143,081)	(143,081)	(1,716,973)	(1,830,903)		
Wellness Utilization	--	(6,402)	(2,651)	(2,651)	(2,651)	(5,235)	(2,651)	(2,741)	(5,527)	(33,160)	(33,160)	(2,861)	(3,316)	(39,337)	(113,355)		
Stop Loss	(306,898)	--	(613,239)	(305,856)	(304,292)	(304,183)	(306,862)	(308,110)	(309,091)	(262,520)	(3,021,051)	(286,708)	(302,105)	(3,609,864)	(3,677,689)		
Professional Development	--	(1,340)	--	(560)	--	--	--	--	--	--	(1,900)	--	--	(1,900)	(5,000)		
Accounts Payable	(689,348)	(48,933)	(118,480)	--	(193)	(6,218)	(9,254)	--	--	--	(872,426)	--	--	(872,426)	--		
Total Disbursements	(2,382,546)	(3,244,412)	(4,521,287)	(4,325,014)	(4,888,586)	(3,662,710)	(4,254,745)	(5,437,676)	(4,506,281)	(2,957,706)	(40,180,963)	(5,078,773)	(4,048,684)	(49,308,420)	\$ (47,855,648)		
Ending Cash Balance	\$ 13,131,270	\$ 13,344,942	\$ 13,052,237	\$ 12,801,342	\$ 11,973,823	\$ 11,430,791	\$ 11,614,635	\$ 10,057,351	\$ 9,830,289	\$ 11,361,196	\$ 11,361,196	\$ 9,254,202	\$ 8,948,551	\$ 8,948,551			
Summary:																	
Cash - U.S. Bank	\$ 1,376,029	\$ 1,378,650	\$ 1,830,165	\$ 1,209,040	\$ 1,701,849	\$ 1,398,254	\$ 1,501,894	\$ 1,448,102	\$ 1,676,267	\$ 1,932,377		\$ --	\$ --				
Local Agency Investment Fund	5,410	5,410	5,410	5,467	5,467	5,467	5,529	5,529	5,529	5,595		--	--				
C.A. Asset Management Fund	11,749,831	11,960,882	11,216,662	11,586,835	10,266,507	10,027,070	10,107,212	8,603,720	8,148,493	9,423,224		--	--				
Ending Cash Balance	\$ 13,131,270	\$ 13,344,942	\$ 13,052,237	\$ 12,801,342	\$ 11,973,823	\$ 11,430,791	\$ 11,614,635	\$ 10,057,351	\$ 9,830,289	\$ 11,361,196		\$ --	\$ --				

(1) Budget as approved at the May 30, 2024 Executive Committee & Full Board Meetings.

Public Agency Coalitions Enterprise
PACE
Check Reimbursements and Wire Transfers
Payment Order Number 2024 - 04
For the Period from 09/01/2024 through 10/31/2024

Ck Date	Check/WT #	Payee	Invoice #	Amount	Transaction Description
9/11/2024	WT091124A	Anthem Blue Cross EFT	542297786675	577,824.14	Claims 08/22-28/24
9/11/2024	WT091124A	Anthem Blue Cross EFT	542292224760	699,061.92	Claims 08/29-09/04/24
9/11/2024	WT091124B	Anthem Blue Cross	001795592H	454,488.40	HMO 09/24
9/11/2024	WT091124C	Anthem Blue Cross	0824	53,667.90	Admin 08/24
9/11/2024	WT091124D	EmpiRx Health EFT	INV24580	153,057.39	Claims 08/24
9/11/2024	WT091124D	EmpiRx Health EFT	INV24828	4,804.65	Admin 08/24
9/11/2024	WT091124D	EmpiRx Health EFT	INV24828-1	15,553.12	Cost Avoidance Fee 07/24
9/11/2024	WT091124E	Keenan & Associates	312212	2,553.60	KPPC 09/24
9/11/2024	WT091124F	Keenan & Associates	0824	74,730.54	Mgmt Fees 08/24
9/11/2024	WT091124G	Symetra Life Insurance Company	0924	309,091.65	Stop Loss 09/24
9/12/2024	10590	April R Allen	73717103	300.00	Claims Refund Reimbursement
9/12/2024	10591	Catilize Health ADM	PAC-20248A	325.00	Admin 08/24
9/12/2024	10592	Catilize Health CL	090324	1,708.46	Claims 09/03/24
9/12/2024	10593	Gallagher Benefit Services, Inc	0824	1,979.50	08/24
9/12/2024	10594	Winton, Ireland Strom & Green - PACE	0824	1,898.88	08/24
9/26/2024	WT092624A	Anthem Blue Cross EFT	542292049142	274,965.37	Claims 09/05-11/24
9/26/2024	WT092624A	Anthem Blue Cross EFT	542297993677	646,768.33	Claims 09/12-18/24
9/26/2024	WT092624B	EmpiRx Health EFT	INV24963	213,718.79	Claims 09/24
9/26/2024	WT092624C	Kaiser	0924	1,016,680.41	Premium 09/24
9/27/2024	10595	Catilize Health CL	091724	362.47	Claims 09/17/24
9/27/2024	10596	WellSteps	9374	90.00	Wellness Program 08/24
September				<u>4,503,630.52</u>	
10/4/2024	WT100424A	Anthem Blue Cross EFT	542292004294	316,368.02	Claims 09/19-25/24
10/4/2024	WT100424A	Anthem Blue Cross EFT	542291231702	389,704.39	Claims 09/26-10/02/24
10/4/2024	WT100424B	Anthem Blue Cross	001809176H	455,366.74	HMO 10/24
10/4/2024	WT100424C	EmpiRx Health EFT	INV25501	190,789.30	Claims 09/24
10/8/2024	10597	Catilize Health ADM	PAC-20249A	325.00	Admin 09/24
10/8/2024	10598	Catilize Health CL	100124	210.27	Claims 10/01/24
10/23/2024	10599	Catilize Health ADM	PAC-202409-S	11,891.44	Savings Calculation 3rd Qtr 2024
10/23/2024	10600	Catilize Health CL	101424	154.14	Claims 10/14/24
10/23/2024	10601	Gallagher Benefit Services, Inc	0924	1,961.00	09/24
10/23/2024	10602	Health Enhancement Systems	10-11033	2,605.80	Wellness Program - 2024 Walktober Challenge
10/23/2024	10603	WellSteps	9456	270.00	Wellness Program 09/24
10/23/2024	10604	Winton, Ireland Strom & Green	0924	1,870.10	09/24
10/23/2024	WT102324A	Anthem Blue Cross EFT	542296367075	283,891.20	Claims 10/03-09/24
10/23/2024	WT102324A	Anthem Blue Cross EFT	542299925311	408,122.95	Claims 10/10-16/24
10/23/2024	WT102324B	Anthem Blue Cross	0924	53,281.80	Admin 09/24
10/23/2024	WT102324C	EmpiRx Health EFT	INV25883	184,542.02	Claims 10/24
10/23/2024	WT102324C	EmpiRx Health EFT	INV25691	2,392.83	Admin 09/24
10/23/2024	WT102324C	EmpiRx Health EFT	INV25691-1	8,794.12	Cost Avoidance Fee 08/24
10/23/2024	WT102324D	Keenan & Associates - PACE KPPC	313308	2,544.15	KPPC 10/24
10/23/2024	WT102324E	Keenan & Associates	0924	76,278.00	Mgmt Fees 09/24
10/23/2024	WT102324E	Keenan & Associates	0324-0824	7,648.71	Mgmt Fees Adjustment 03/24-08/24
10/23/2024	WT102324F	Symetra Life Insurance Company	1024	308,764.47	Stop Loss 10/24
10/29/2024	WT102924	Anthem Blue Cross EFT	542299501584	293,524.18	Claims 10/17-23/24
October				<u>3,001,300.63</u>	
Report Total				<u>7,504,931.15</u>	



**FINANCIAL REPORT
FOR THE TWO MONTHS ENDED
OCTOBER 31, 2024**

**Presented by:
Sam Mel-Chan
December 11 & 12, 2024**



10 Months - 83.33%

Page 1

	10/31/2024 Actual	Final Budget	Variance	%
Operating Revenues	<u>\$ 38,983,458</u>	<u>\$ 47,855,648</u>	<u>\$ (8,872,190)</u>	<u>81.46 %</u>
Operating Expenditures	<u>\$ 42,033,904</u>	<u>\$ 47,855,648</u>	<u>\$ (5,821,744)</u>	<u>87.83 %</u>
Non Operating Rev/(Exp) Late Fees Investment Income \$ 525,694 21,190 504,504				
Non Operating Rev/Exp	<u>\$ 525,694</u>	<u>\$ 577,952</u>	<u>\$ (52,258)</u>	<u>90.96 %</u>

Revenues vs. Claims/Admin Paid	\$ (2,391,526)
Accounts Payable Activity	1,271,440
Unearned Revenue Activity	176,601
Wellness Program Activity	16,630
Late Fees	21,190
Investment Income	504,504

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	12/31/2023	Activity	10/31/2024	%
Total Assets	\$ 12,238,177	\$ (401,161)	\$ 11,837,016	(3.28)

Accounts Payable - Prior	\$ (891,666)
Accounts Payable - Current	2,163,106
Unearned Revenue - Prior	(723,567)
Unearned Revenue - Current	900,168
Increase in Claim Liabilities	625,550

Page 2

	12/31/2023	Activity	10/31/2024	%
Total Liabilities	\$ 4,126,383	\$ 2,073,591	\$ 6,199,974	50.25

Revenues vs. Claims/Admin Paid	\$ (2,391,526)
Late Fees	21,190
Investment Income	504,504
Wellness Program Activity	16,630
Increase in Claim Liabilities	(625,550)

Page 2

	12/31/2023	Activity	10/31/2024	%
Undesignated - Net Position	8,103,094	(2,491,382)	5,611,712	(30.75)
Designated - Wellness Funds	8,700	16,630	25,330	191.15
Total Net Position \$	<u>\$ 8,111,794</u>	<u>\$ (2,474,752)</u>	<u>\$ 5,637,042</u>	<u>(30.51)</u>

Cash Flow Analysis	Actuals as of 10/31/2024	Projected as of 12/31/2024
Beginning Cash Balance	<u>\$ 11,325,762</u>	<u>\$ 11,325,762</u>
Member Contributions		
Kaiser	10,140,726	12,168,872
Anthem - HMO	4,605,030	5,526,036
Anthem - Self Funded	22,153,581	26,584,297
EmpiRx Rebates	128,568	257,432
Stop Loss Reimbursement	1,585,549	1,585,599
Unearned Revenue	176,601	(723,567)
Late Fee	3,979	3,979
Investment Income	504,481	605,377
Prepaid Expense	(5,302)	- -
Interest Receivable	117	117
Accounts Receivable	<u>923,067</u>	<u>923,067</u>
Total Inflow	<u>\$ 40,216,397</u>	<u>\$ 46,931,209</u>
Premium		
Kaiser	(9,083,385)	(12,169,507)
Anthem - HMO	(4,412,508)	(5,307,545)
Anthem - Claims	(18,290,967)	(21,949,161)
EmpiRx - Claims	(3,034,755)	(3,641,707)
Administration	(1,430,811)	(1,716,973)
Wellness Utilization	(33,160)	(39,337)
Stop Loss	(3,021,051)	(3,609,864)
Professional Development	(1,900)	(1,900)
Accounts Payable	<u>(872,426)</u>	<u>(872,426)</u>
Total Outflow	<u>\$ (40,180,963)</u>	<u>\$ (49,308,420)</u>
Ending Cash Balance	<u>\$ 11,361,196</u>	<u>\$ 8,948,551</u>

Questions?

Thank you from your



Team



Account Statement - Transaction Summary

For the Month Ending **September 30, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

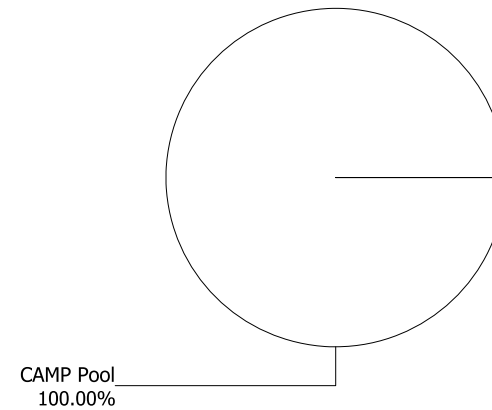
CAMP Pool

Opening Market Value	8,603,720.43
Purchases	1,445,772.64
Redemptions	(1,901,000.00)
Unsettled Trades	0.00
Change in Value	0.00
Closing Market Value	\$8,148,493.07
Cash Dividends and Income	38,772.64

Asset Summary

	September 30, 2024	August 31, 2024
CAMP Pool	8,148,493.07	8,603,720.43
Total	\$8,148,493.07	\$8,603,720.43

Asset Allocation





Account Statement

For the Month Ending **September 30, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
CAMP Pool					
Opening Balance					8,603,720.43
09/12/24	09/12/24	Purchase - Incoming Wires	1.00	319,000.00	8,922,720.43
09/20/24	09/20/24	Purchase - Incoming Wires	1.00	1,088,000.00	10,010,720.43
09/27/24	09/27/24	Redemption - Outgoing Wires	1.00	(1,901,000.00)	8,109,720.43
09/30/24	10/01/24	Accrual Income Div Reinvestment - Distributions	1.00	38,772.64	8,148,493.07
Closing Balance					8,148,493.07

	Month of September	Fiscal YTD July-September		
Opening Balance	8,603,720.43	10,027,070.43	Closing Balance	8,148,493.07
Purchases	1,445,772.64	2,747,422.64	Average Monthly Balance	8,952,512.85
Redemptions (Excl. Checks)	(1,901,000.00)	(4,626,000.00)	Monthly Distribution Yield	5.29%
Check Disbursements	0.00	0.00		
Closing Balance	8,148,493.07	8,148,493.07		
Cash Dividends and Income	38,772.64	129,422.64		



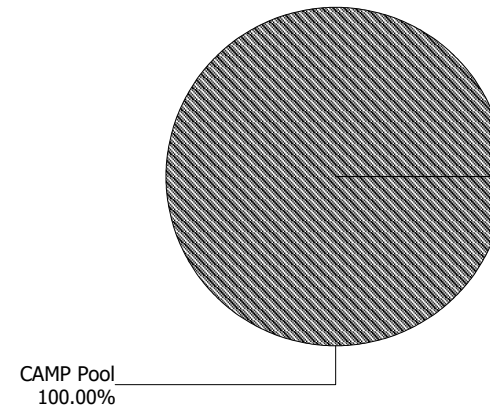
Account Statement - Transaction Summary

For the Month Ending **October 31, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

CAMP Pool	
Opening Market Value	8,148,493.07
Purchases	1,511,731.30
Redemptions	(237,000.00)
Unsettled Trades	0.00
Change in Value	0.00
Closing Market Value	\$9,423,224.37
Cash Dividends and Income	38,731.30

Asset Summary		
	October 31, 2024	September 30, 2024
CAMP Pool	9,423,224.37	8,148,493.07
Total	\$9,423,224.37	\$8,148,493.07
Asset Allocation		





Account Statement

For the Month Ending **October 31, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
CAMP Pool					
Opening Balance					8,148,493.07
10/07/24	10/07/24	Purchase - Incoming Wires	1.00	90,000.00	8,238,493.07
10/11/24	10/11/24	Purchase - Incoming Wires	1.00	1,383,000.00	9,621,493.07
10/23/24	10/23/24	Redemption - Outgoing Wires	1.00	(237,000.00)	9,384,493.07
10/31/24	11/01/24	Accrual Income Div Reinvestment - Distributions	1.00	38,731.30	9,423,224.37
Closing Balance					9,423,224.37

	Month of October	Fiscal YTD July-October		
Opening Balance	8,148,493.07	10,027,070.43	Closing Balance	9,423,224.37
Purchases	1,511,731.30	4,259,153.94	Average Monthly Balance	9,090,387.63
Redemptions (Excl. Checks)	(237,000.00)	(4,863,000.00)	Monthly Distribution Yield	5.03%
Check Disbursements	0.00	0.00		
Closing Balance	9,423,224.37	9,423,224.37		
Cash Dividends and Income	38,731.30	168,153.94		

California State Treasurer
Fiona Ma, CPA



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

October 02, 2024

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[PMIA Average Monthly Yields](#)

PUBLIC AGENCY COALITION ENTERPRISE
(PACE)
KEENAN & ASSOC/SETECH DEPT
P.O. BOX 4328
TORRANCE, CA 90510

[Tran Type Definitions](#)

Account Number: 40-19-075

September 2024 Statement

Account Summary

Total Deposit:	0.00	Beginning Balance:	5,529.28
Total Withdrawal:	0.00	Ending Balance:	5,529.28

California State Treasurer
Fiona Ma, CPA



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

November 07, 2024

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PUBLIC AGENCY COALITION ENTERPRISE
(PACE)
KEENAN & ASSOC/SETECH DEPT
P.O. BOX 4328
TORRANCE, CA 90510

[Tran Type Definitions](#)

Account Number: 40-19-075

October 2024 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
10/15/2024	10/14/2024	QRD	1761000	N/A	SYSTEM	65.57

Account Summary

Total Deposit:	65.57	Beginning Balance:	5,529.28
Total Withdrawal:	0.00	Ending Balance:	5,594.85

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Anthem Update

ITEM #: 2024-022

Enclosure: Yes

Category: Financial

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

PACE is in a standalone partnership with Anthem effective January 1, 2020.

STATUS:

The Board will hear and discuss a report from Anthem.

RECOMMENDATIONS:

For review, discussion, and action as necessary.



Financial and Utilization Dashboard (Paid Claims)

Medical Membership Summary

Period	Subscribers	Members	Contract Size	Contract Size Commercial Benchmark	Member Trend
Current	1,373	2,856	2.1	2.0	0.2%
Prior	1,347	2,850	2.1	2.0	7.4%

Medical and Pharmacy Paid Amount Summary

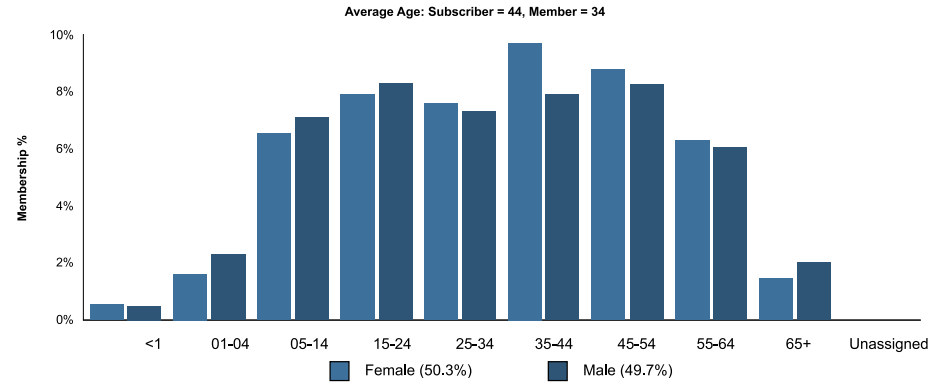
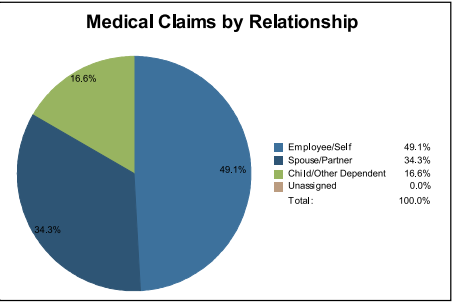
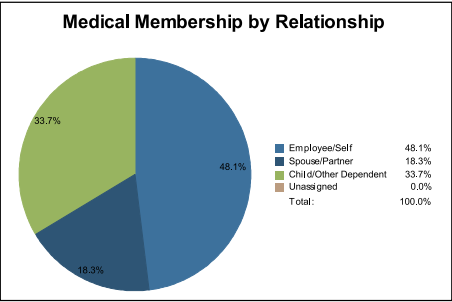
	Current	Prior	Trend	Prior Trend
Medical				
Paid Amount	\$21,317,082	\$13,934,766		
Paid PMPM	\$622.00	\$407.52	52.6%	0.8%
Paid PEPM	\$1,293.51	\$862.41	50.0%	-3.4%
Pharmacy				
Paid Amount	\$357,620	\$233,292		
Paid PMPM	\$66.04	\$51.07	29.3%	-16.7%
Paid PEPM	\$143.22	\$116.53	22.9%	-21.1%
Total				
Paid Amount	\$21,674,702	\$14,168,058		
Paid PMPM	\$632.43	\$414.34	52.6%	0.3%
Paid PEPM	\$1,315.21	\$876.84	50.0%	-4.0%
Paid Amount In Network	\$20,523,835	\$13,395,025		
Percent Paid Amount In Network	96.3%	96.1%		
Discount Amount	\$35,258,963	\$23,467,882		

High Cost Claimants with Paid Amounts > \$100,000

High Cost Claimant (HCC) Summary	Current	Prior	Trend	Commercial Benchmark	Percent Paid In Network
Total Paid Amount	\$21,674,702	\$14,168,058			96.3%
Total HCC Paid Amount Med	\$9,645,103	\$3,483,706			96.6%
Total HCC Paid Amount Rx	\$40,532	\$9,116			100.0%
HCC Paid Amount as % of Total Paid Amount	44.7%	24.7%	81.3%	33.4%	
Number of HCC Members > \$100K	34	17			
HCC Members as Percent of Total Members	1.2%	0.6%	99.5%	0.9%	
High Cost Claimant (HCC) Detail	Current	Prior	Trend	Commercial Benchmark	
HCC PMPM - Total	\$282.61	\$102.15	176.7%	\$166.54	
HCC PEPM - Total	\$587.72	\$216.17	171.9%	\$330.93	
Non-HCC PMPM - Total	\$349.82	\$312.20	12.1%	\$331.66	
Non-HCC PEPM - Total	\$727.49	\$660.68	10.1%	\$659.03	
HCC PMPM - Medical	\$281.43	\$101.88	176.2%	\$153.33	
HCC PEPM - Medical	\$585.26	\$215.60	171.5%	\$304.69	
Non-HCC PMPM - Medical	\$340.57	\$305.64	11.4%	\$296.48	
Non-HCC PEPM - Medical	\$708.25	\$646.80	9.5%	\$589.13	
HCC PMPM - Pharmacy	\$7.49	\$2.00	275.1%	\$44.85	
HCC PEPM - Pharmacy	\$16.23	\$4.55	256.5%	\$82.51	
Non-HCC PMPM - Pharmacy	\$58.56	\$49.08	19.3%	\$119.44	
Non-HCC PEPM - Pharmacy	\$126.99	\$111.98	13.4%	\$219.75	

Note: High Cost Claimants are defined as those claimants with more than \$100,000 in paid amount during the reporting period. Benchmark total doesn't equal Medical and Pharmacy combined because not all clients have Anthem pharmacy.

Medical Membership Summary by Age Band and Gender



NOTE: Anthem Book of Business Average Age is 35



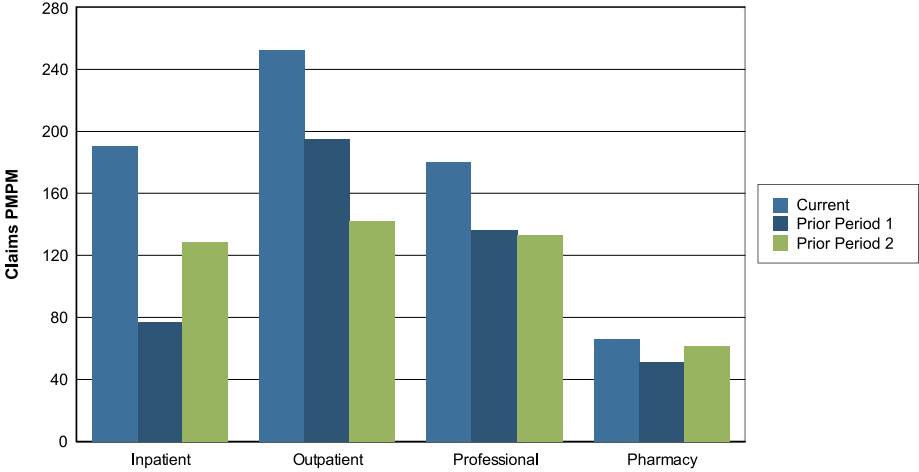
Current Period : Nov 2023 - Oct 2024
Prior Period 1 : Nov 2022 - Oct 2023
Prior Period 2 : Nov 2021 - Oct 2022

Financial and Utilization Dashboard (Paid Claims)

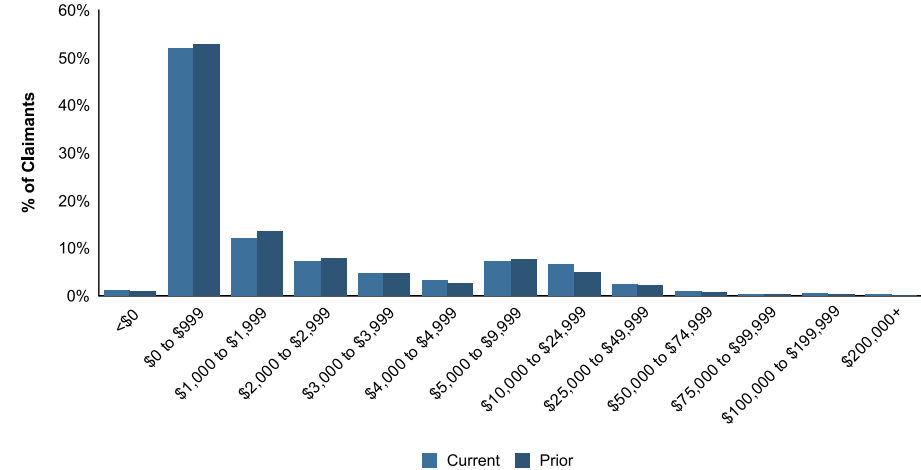
Utilization Breakdown

Metrics	Current Period	Prior Period 1	Prior Period 2	Trend Lines
Utilization				
IP Facility Acute Admissions per 1000	55.0	34.4	44.9	
IP Facility Acute Days per 1000	278.7	125.6	238.2	
IP Facility Acute Avg LOS	5.07	3.65	5.31	
OP Facility Visits per 1000	1,909.3	1,387.6	1,270.5	
Professional Services per 1000	20,046.6	18,371.3	18,306.2	
Paid Amount PMPM by Setting				
IP Facility Acute Admit	\$189.95	\$76.60	\$128.65	
OP Facility Visits	\$252.30	\$194.92	\$142.18	
Professional Service	\$179.74	\$136.00	\$133.45	

Paid Amount by Setting



Paid Claims Distribution



Note: Based on medical and pharmacy where applicable

In California Anthem Blue Cross is the trade name of Blue Cross of California, Inc. Also serving California: Anthem Blue Cross Life and Health Insurance Company. In 11 northeastern counties of New York Anthem Blue Cross is the trade name of Anthem HealthChoice Assurance, Inc., and Anthem HealthChoice HMO, Inc., and Anthem Blue Cross HP is the trade na Anthem HP, LLC. Independent licensees of the Blue Cross Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc.

This confidential information should not be distributed without prior written consent and should only be used to review health care utilization.

Disclaimer: Paid date is the date the claim was adjudicated in the claims system

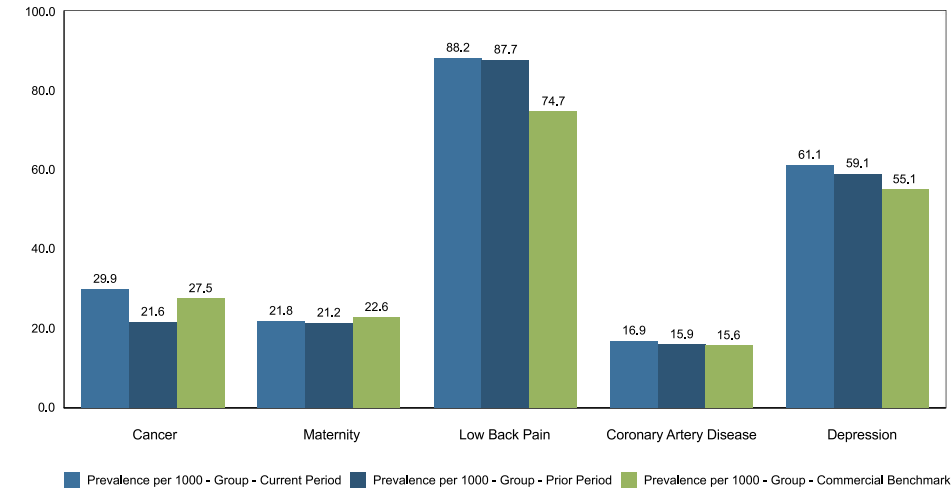
Pharmacy Highlights

Drug	Paid Amount	Scripts	Paid Per Script	Percent of Claims Paid
OZEMPIC	\$43,898	32	\$1,372	12.3%
ABIRATERONE ACETATE	\$34,653	10	\$3,465	9.7%
XIFAXAN	\$23,723	8	\$2,965	6.6%
JARDIANCE	\$23,039	26	\$886	6.4%
MOUNJARO	\$13,348	7	\$1,907	3.7%
XOLAIR	\$11,013	*	*	3.1%
FARXIGA	\$10,470	9	\$1,163	2.9%
PAXLOVID	\$9,729	7	\$1,390	2.7%
TRELEGY ELLIPTA	\$8,360	13	\$643	2.3%
TRESIBA FLEXTOUCH U-200	\$7,628	13	\$587	2.1%
Top Ten Subtotal	\$185,861	130	\$1,430	52.0%
All Other Drugs	\$171,759	2,990	\$57	48.0%
Total	\$357,620	3,120	\$115	100.0%

* This value not shown due to small numbers.
The data in any reports provided by Anthem may contain substance use disorder information subject to 42 CFR Part 2. 42 CFR Part 2 prohibits unauthorized disclosure of these records.

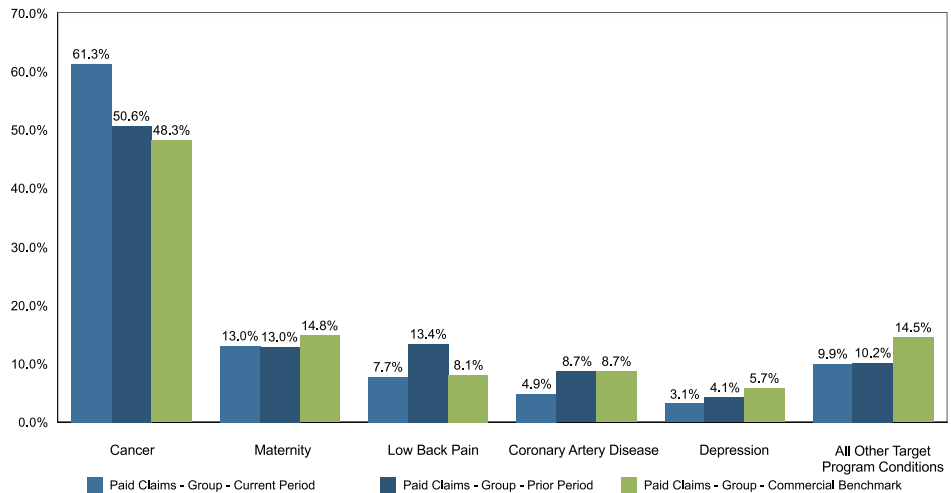
Top Five Target Program Conditions Compared to Benchmark (Based on Paid Amount)

Prevalence per 1000 for Target Program Conditions



Top Five Target Program Conditions Compared to Benchmark (Based on Paid Amount)

Percent of Paid Amount for Target Program Conditions

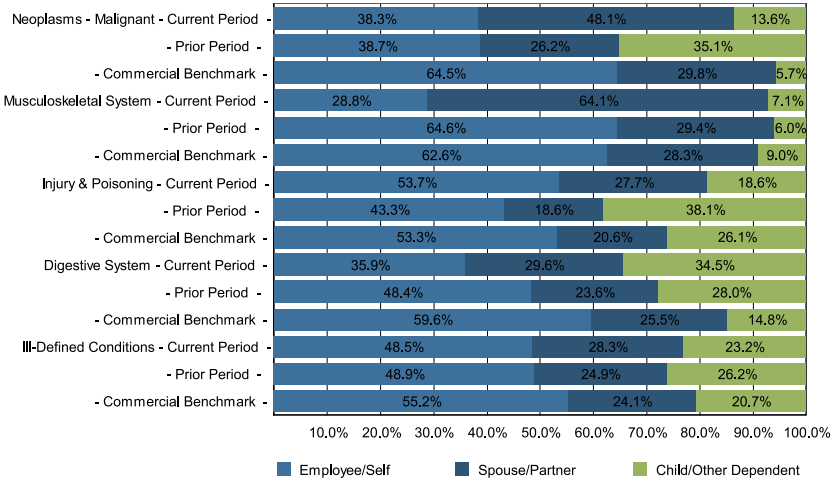


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Top Five Health Conditions by Paid Amount

Percentage of Claims Paid by Relationship



Health Risk Index

The Risk Index is based on Incurred and Paid Claims

	Current	Prior	Percent Change
Group	1.37	1.30	5.5%
Commercial Benchmark	1.00	1.00	0.0%
Variance to Commercial Benchmark	37.0%	29.9%	

The Health Risk Index is a diagnostic and age/sex adjusted projection of the population's likely level of risk for the period indicated. The Benchmark is presented for comparison. The comparison population reflects the healthcare experience of employees and dependents from a large national dataset. A score higher than 1.0 indicates a higher level of risk as compared to the national dataset.

What's impacting medical trend?



Per Member Per Month (PMPM)

PMPM ▲ 52.6% to \$622.00

- Paid amount ▲ 53.0%
 - Paid: \$21.3M
- Membership ▲ 0.2%
 - Members: 2,856

96.3% of medical claims were paid In-Network

Total PMPM (Med + Rx) ▲ 52.6% to \$632.43



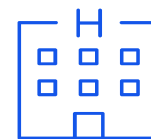
High-cost claims (claims >\$100K)

HCC represents 1.2% of members and 44.7% of spend

Benchmark HCC Spend: 33.4%

The number of High-cost claimants increased from 17 to 34

Total high cost paid amount increased from \$3.5M to \$9.6M



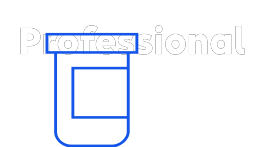
Place of Service

Outpatient care made up 40.6% of the total spend

- PMPM ▲ 29.4%
- Utilization ▲ 37.6%

Inpatient care made up 30.5% of the total spend

- PMPM ▲ 148.0%
- Utilization ▲ 59.9%



Pharmacy

Rx accounts for 1.3% of total spend.

- Rx paid amount: \$357,620
- Rx PMPM ▲ 29.3% to \$66.04

Ozempic was the top drug by spend representing 12.3% of paid claims

Abiraterone Acetate is the second top drug by spend at 9.7%; used in the treatment of prostate cancer.

What health conditions are impacting the population?



Cancer

The top condition by cost was Cancer.

- Spouses accounted for 48.1% of total Cancer spend
- In the prior year, Spouses accounted for 26.2%
- Benchmark: Spouses accounted for 29.8%

As a targeted condition, cancer prevalence and spend is above Benchmark



Musculoskeletal

Musculoskeletal was #2 health condition by cost.

- Spouses accounted for 64.1% of total MSK spend
- In the prior year, Spouses accounted for 29.4%
- Benchmark: Spouses accounted for 28.3%

Low Back Pain is the top targeted condition by prevalence and is above Benchmark.



Depression

Depression was the 2nd highest targeted condition by prevalence.

- Depression prevalence has remained similar to the prior period
- Depression prevalence is 10.9% higher than Benchmark

Although the prevalence of depression is higher than the benchmark, the percentage of spending on depression (3.1%) is lower than the benchmark (5.7%)

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Ancillary Updates – LiveHealth Online and EmpiRx

ITEM #: 2024-023

Enclosure: Yes

Category: Financial

Prepared by: Keenan & Associates & EmpiRx

Requested by: Executive Committee

BACKGROUND:

PACE offers the following value-add services to members:

- LiveHealth Online Medical - provides access to telehealth doctor visits 24/7/365.
- EmpiRx Health - administers PACE's prescription drug plan for the self-funded EPO and PPO plans.

STATUS:

The Board will hear a report on the LiveHealth Online and EmpiRx utilization reports.

RECOMMENDATIONS:

For review, discussion, and action as necessary.

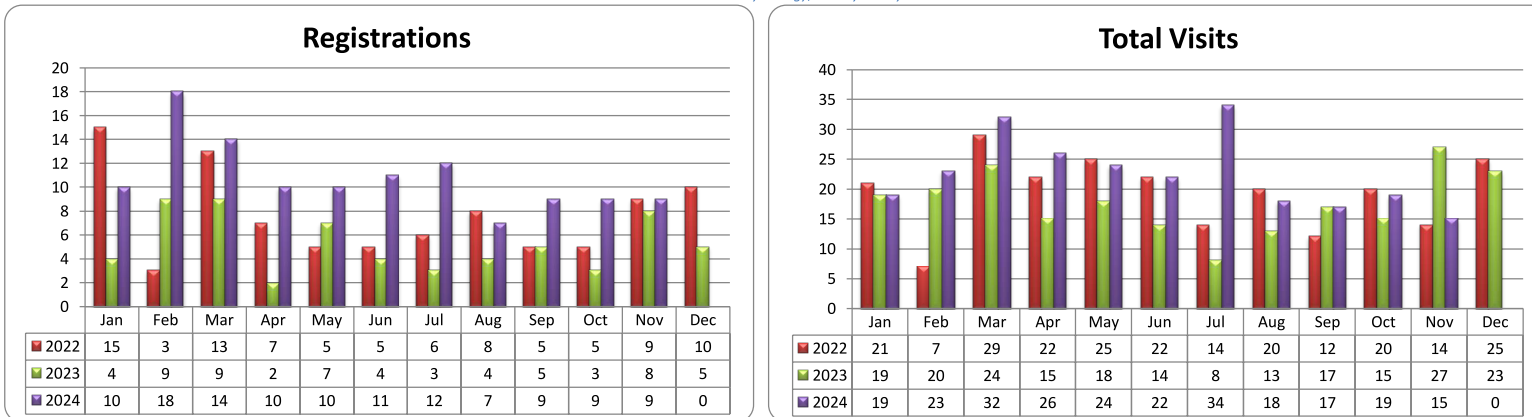
PACE
Registration & Utilization
1/1/13 thru 11/30/24
(282517)

Date Printed:12/2/24

Registrations		VISITS						UTILIZATION	
		Medical	VPC	BH	Breastfeeding	Dermatology	Grand Total	Medical	BH
Year	Count	Count	Count	Count	Count	Count	Count		
2024	119	193	24	32	0	0	249	0.37	0.06
2023	63	165	0	42	0	6	213	0.35	0.09
2022	91	194	0	32	1	0	227	0.48	0.08
all prior years	354	258	0	42	0	0	300	0.64	0.11
Total 1/1/13 thru 11/30/24	627	810	24	148	1	6	989	0.48	0.09

	Medical	VPC	BH	Breastfeeding	Dermatology
Nbr of Users	349	18	14	1	9
Avg Wait time (min:sec)	7:35	2:19	5:01	2:39	0
Avg Visit Duration (min:sec)	5:20	11:05	43:08 ¹ 13:30 ²	1:39	N/A
Avg Rating of LHO (Scale 1-5, 5=best)	4.9 (n=242)	5.0 (n=13)	4.9 (n=26)	0.0 (n=0)	0.0 (n=0)
Avg Rating of Provider (Scale 1-5, 5=best)	4.9 (n=245)	5.0 (n=13)	5.0 (n=27)	0.0 (n=0)	0.0 (n=0)

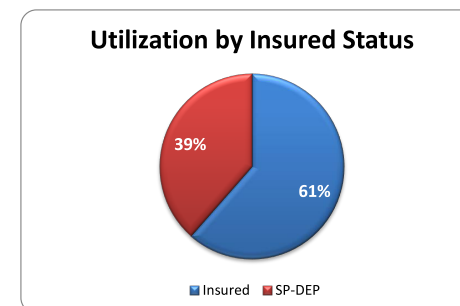
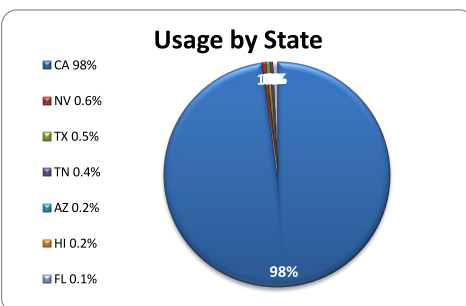
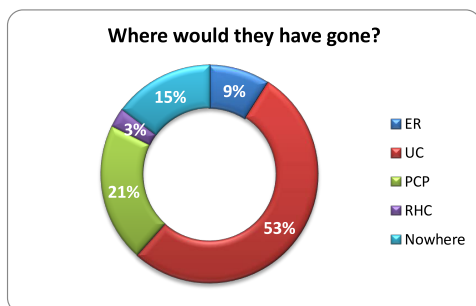
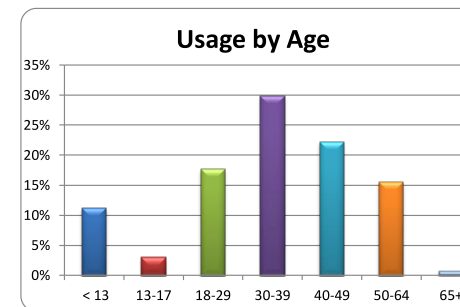
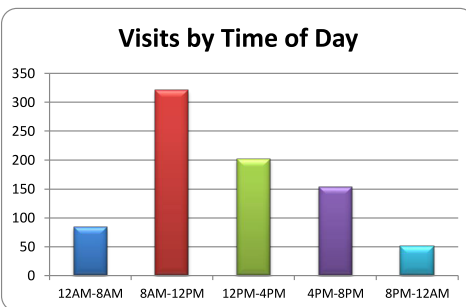
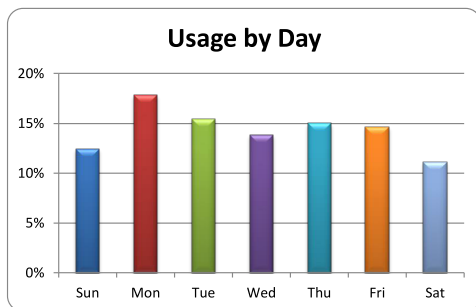
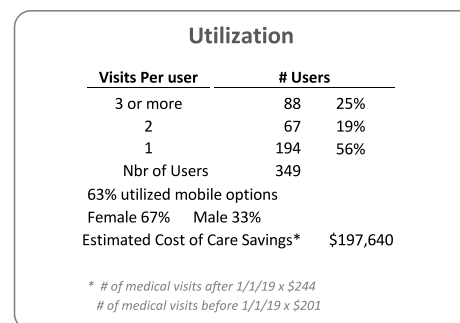
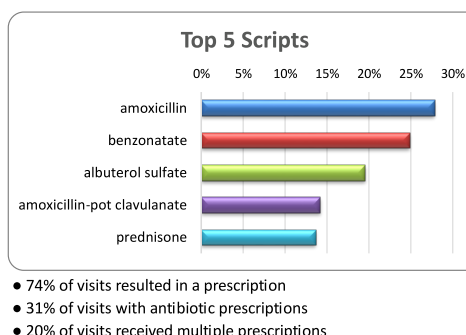
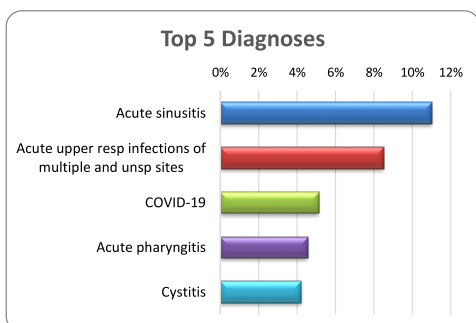
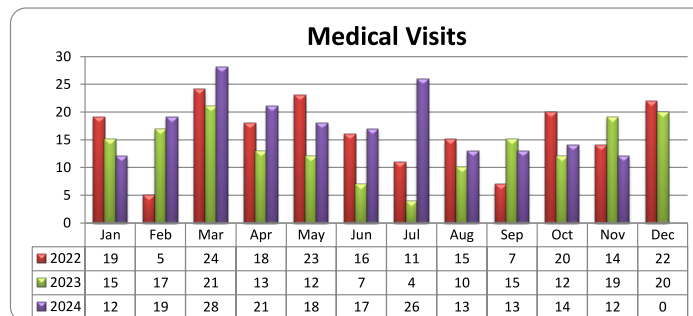
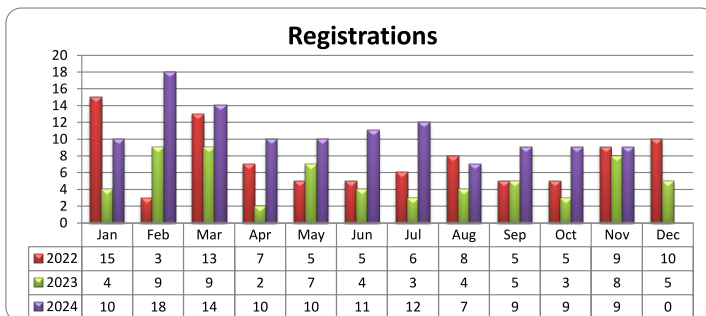
1 = Psychology, 2 = Psychiatry



Note: Registrations and Total Visits charts show only the most recent 3 years

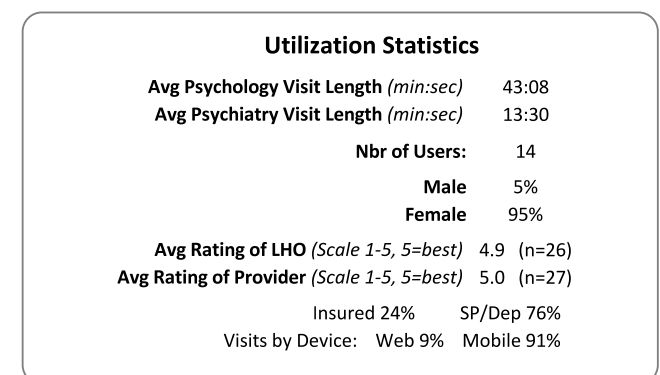
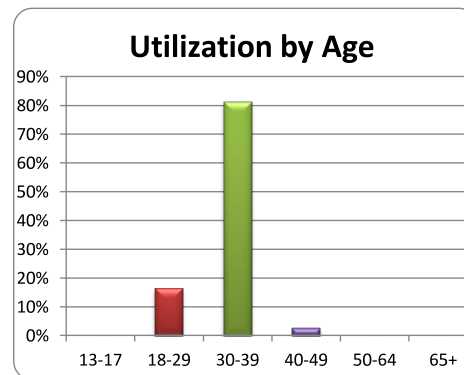
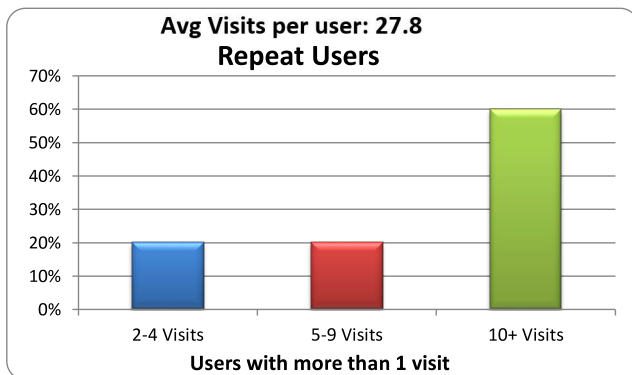
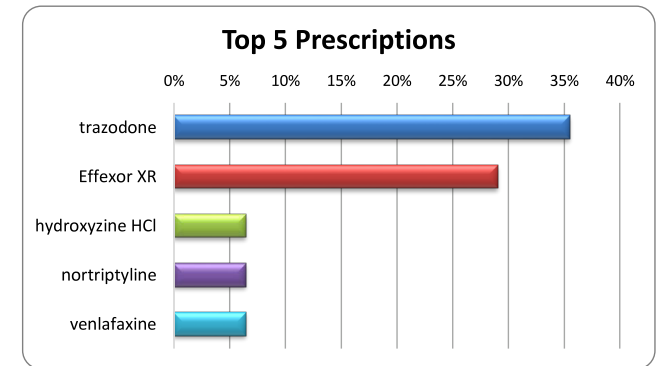
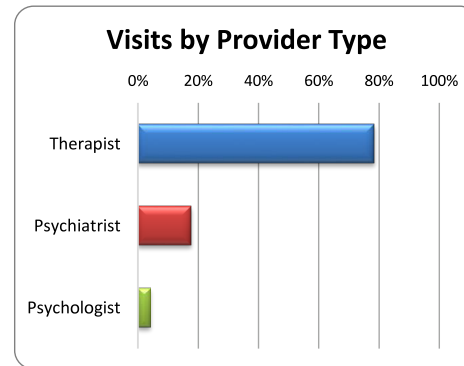
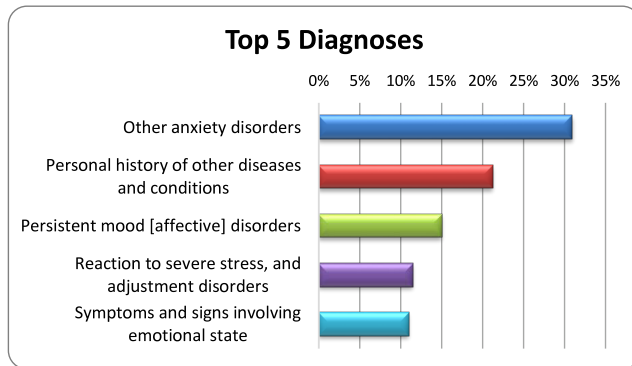
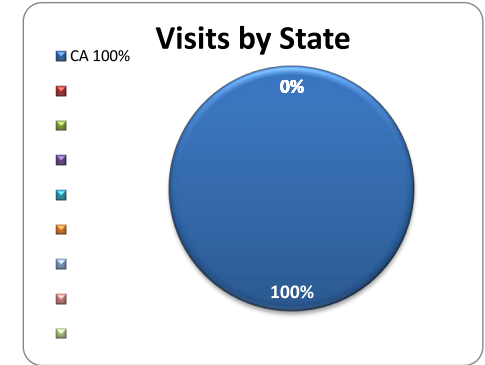
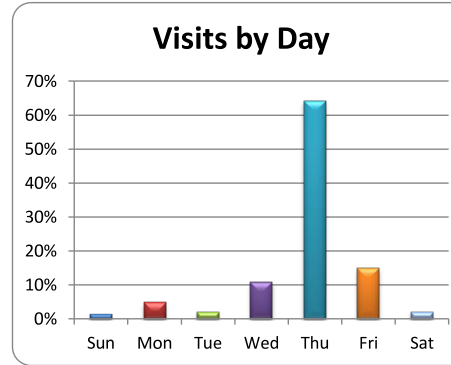
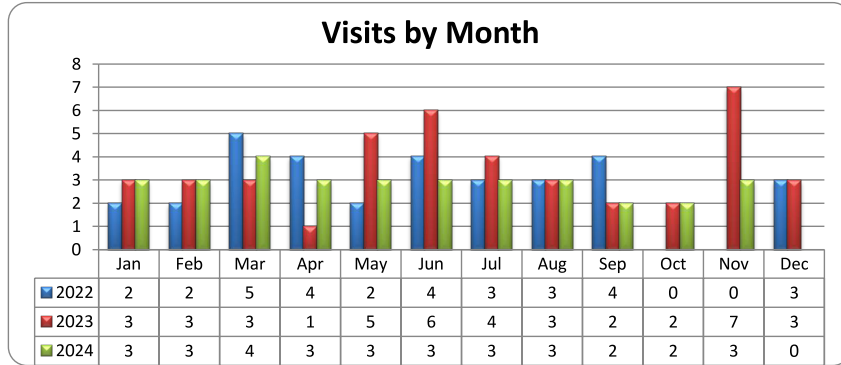
MEDICAL ACTIVITY

Note: Registrations and Medical Visits charts show only the most recent 3 years



BEHAVIORAL HEALTH ACTIVITY

Note: Visits by Month chart shows only the most recent 3 years



Semi-Annual Performance Review

October 23, 2024



Agenda.

- Your Population
- Executive Summary
- PMPM Deep Dive
- Drivers of Spend & Savings
- Member Care Advocacy
- Solutions
- Clinical Insights



PACE's Prescription for Pharmacist-Driven Savings Success

Population Health Management solution drove value & positive outcomes

Population Health Management Engine Identified:

Second-Line Therapy

Patient: 53-year-old male

Diagnosis: Type 2 Diabetes

Original Rx: Jardiance 10mg Tablet #30/30

Clinical Summary

Our Clinical Pharmacist called the prescribing physician to discuss whether the patient was following guideline therapies for Type 2 Diabetes.

New Therapy

The member was switched to an appropriate guideline-based, first-line therapy for Type 2 Diabetes, Metformin 500mg Tablets #60/30, resulting in reduced costs.

\$4,873

ANNUAL PLAN SAVINGS



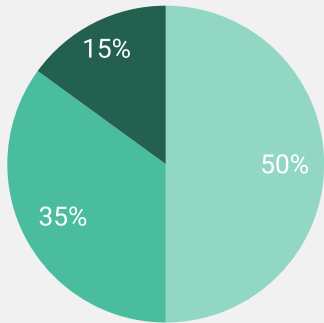
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Optimizing Outcomes: PACE's Population Health Summary

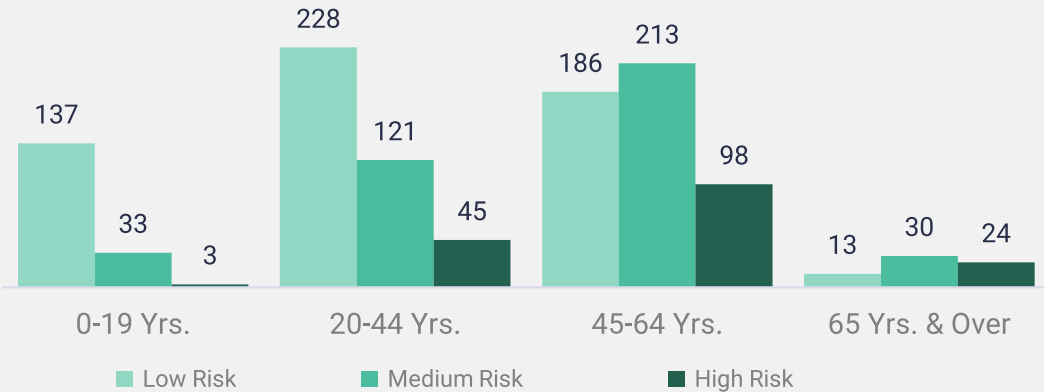
Q3 2024

Population Risk Stratification

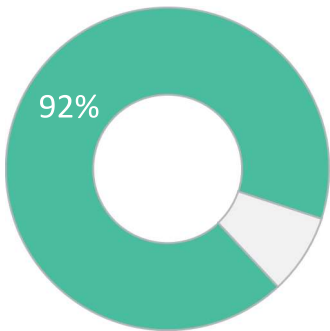
Total Utilizers 1,131



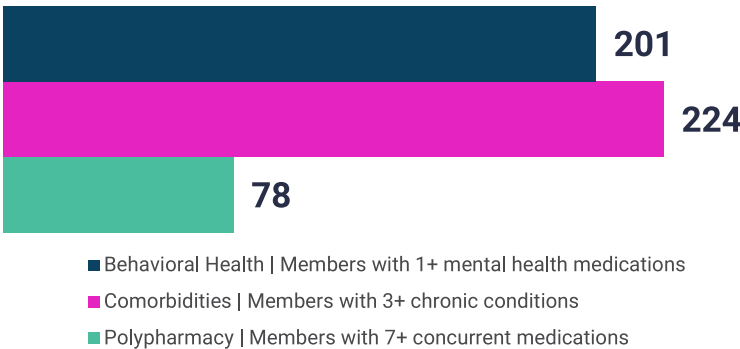
Risk Distribution by Age



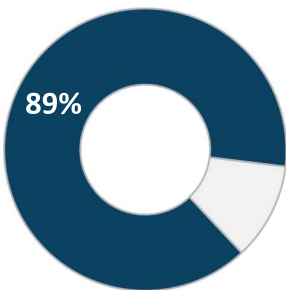
Medication Adherence



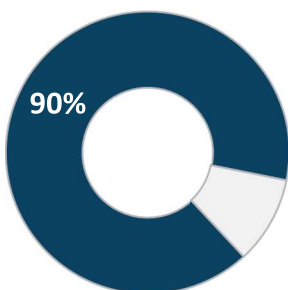
Known Complexities



Generic Dispensing Rate



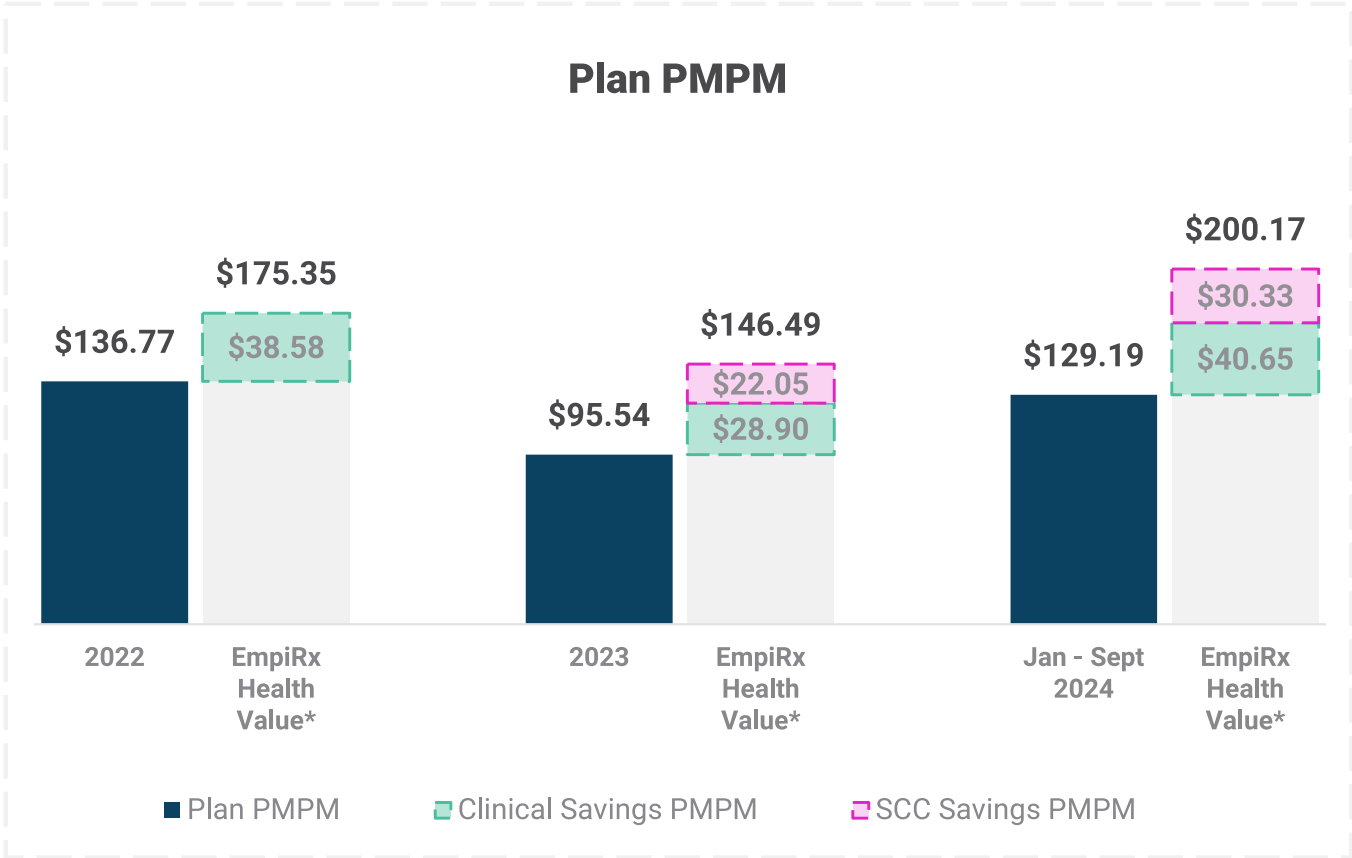
With Vaccines



Without Vaccines

Executive Summary

Jan 2022 – Sept 2024



*Clinical savings is based on ingredient cost

Clinical Savings
(Jan – Jun 2024)

\$589,141

Payer Matrix Savings
(Jan – Aug 2024)

\$586,213

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PMPM Deep Dive

FY 2023 vs. Jan-Sept 2024

PMPM Breakdown: Specialty & Non-Specialty

\$129.19



KEY HIGHLIGHTS

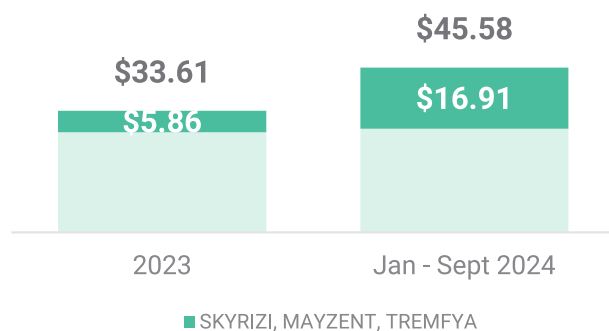
Drivers of Specialty PMPM

- **Skyrizi** (+\$5.35 PMPM) – 2 more utilizers and 3 more claims
- **Mayzent** (+\$2.94 PMPM) – 7 more claims
- **Tremfya** (+\$2.76 PMPM) – 4 more claims

Drivers of Non-Specialty PMPM

- **Wegovy** (+\$9.47 PMPM) – 33 more utilizers and 129 more claims
- **Mounjaro** (+\$3.64 PMPM) – 4 more utilizers and 62 more claims
- **Ozempic** (+\$3.46 PMPM) – 12 more claims
- **Zepbound** (+\$3.37 PMPM) – 21 new utilizers with 47 claims
- **Paxlovid** (+\$2.36 PMPM) – No longer funded by government in 2024

Drivers of Specialty PMPM



Drivers of Non-Specialty PMPM



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Drivers of Spend & Savings

TOP 5 DRIVERS OF PLAN PAID (Jan – Sept 2024)

Category	% of Plan Paid	Plan Paid	Top Drug	Total Claims	Total Utilizers
ANTIDIABETICS	21%	\$596,851	OZEMPIC	1,483	157
ADHD/ANTI-NARCOLEPSY/ANTI-OBESITY/ANOREXIANTS	16%	\$440,120	WEGOVY	566	125
DERMATOLOGICALS	15%	\$408,171	SKYRIZI PEN	585	261
ANALGESICS - ANTI-INFLAMMATORY	11%	\$307,587	RINVOQ	502	261
PSYCHOTHERAPEUTIC AND NEUROLOGICAL AGENTS - MISC.	4%	\$123,381	MAYZENT	26	6

TOP 5 DRIVERS OF SAVINGS (Jan – Jun 2024)

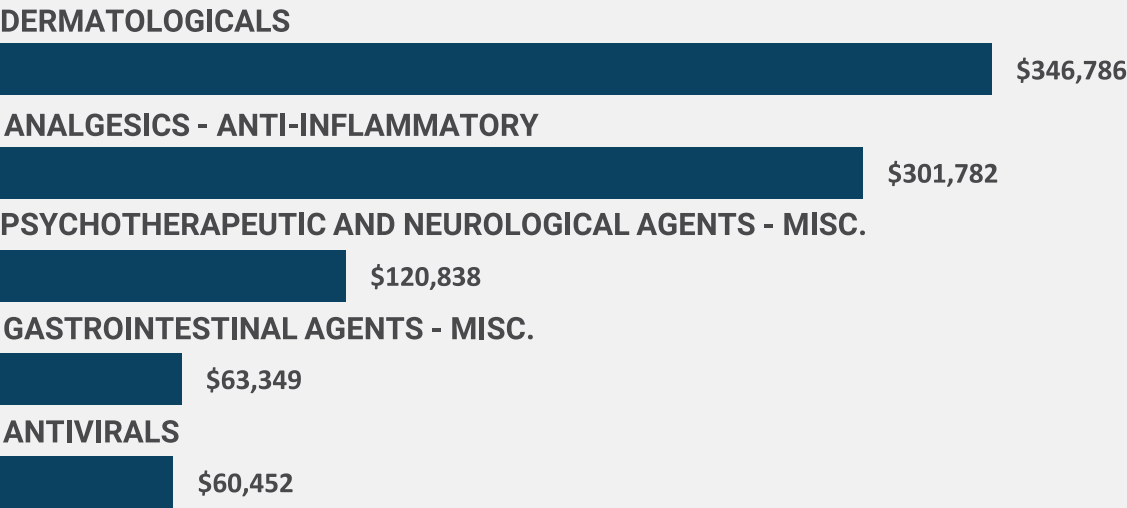
Category	% of Savings	Clinical Savings	Top Drug	Total Interventions	Savings Per Intervention
ANTINEOPLASTICS AND ADJUNCTIVE THERAPIES	29%	\$168,156	CABOMETYX	6	\$28,026
PSYCHOTHERAPEUTIC AND NEUROLOGICAL AGENTS - MISC.	14%	\$83,106	ZEPOSIA	1	\$83,106
ANTIDIABETICS	13%	\$78,524	OZEMPIC	22	\$3,569
MIGRAINE PRODUCTS	13%	\$75,984	UBRELVY	12	\$6,332
ADHD/ANTI-NARCOLEPSY/ANTI-OBESITY/ANOREXIANTS	7%	\$40,776	WEGOVY	25	\$1,631

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Specialty Deep Dive

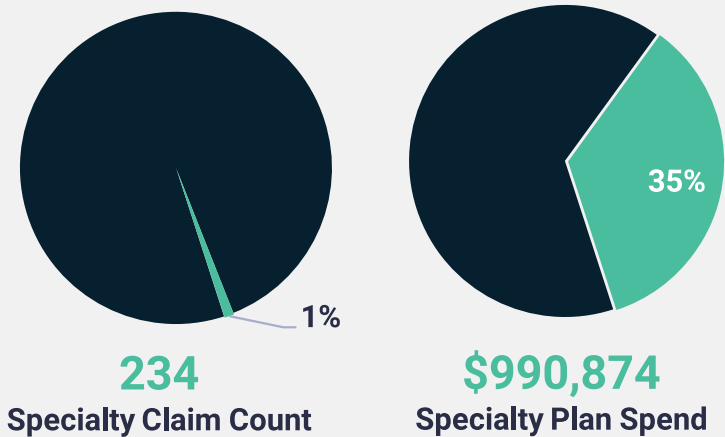
Jan – Sept 2024

Top 5 Specialty Categories



Drug Name	Specialty Spend	Utilizers	% of Specialty Spend
SKYRIZI PEN	\$209,507	4	21%
RINVOQ	\$123,332	4	12%
HUMIRA PEN	\$81,438	3	8%
TREMFYA	\$69,336	1	7%
MAYZENT	\$67,578	1	7%
Top 5 Specialty Medications Drive 55% of Specialty Spend			

1% of claims drove 35% of total spend



Payer Matrix Savings

(Jan – Aug 2024)

\$586,213

Specialty Clinical Savings

(Jan – June 2024)

\$297,339

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Compassionate Care for Every Population

*Complex Care Management (CCM) and Member Care Advocacy (MCA) identify members with intricate needs and assist them clinically to live **happier** and **healthier** lives.*



IDENTIFYING MEMBERS

- 2.6% of the EmpiRx Health population use 48% of our services.
- Complex Care Management model uses AI to identify members with those at high risk.
- Produces substantial savings for members and plan sponsors.



CARE MODEL IN ACTION

- Member Care Advocate is available to the member on a dedicated, direct line.
- Serves as care coordinator, working with the member's pharmacy and physician.
- Proactive check-ins between the member care advocate and their member.



CLINICALLY-DRIVEN RESULTS

- Gaps in care are reduced and members' quality of life are improved.
- Member dashboard delivers key, lean data insights on care needs and outcomes.
- Ensures proper evaluation, tracking, and the highest level of care possible.

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Premier care model for patients with complex needs

During a welcome call, our member mentioned that she was out of her Levothyroxine thyroid medication and was unsure why her insurance was rejecting the prescription at the pharmacy. After reviewing her claim, our Member Care Advocate (MCA) discovered that the Levothyroxine capsules had been denied because she needed to try the tablets first for 30 days.

To help her, the MCA promptly reached out to her prescriber's office and submitted an urgent request for the tablets. The very next day, we received a paid claim, and the MCA called the member to share the good news.

The member expressed much gratitude for our assistance. Our MCA team will continue to check in with her each month to ensure everything goes smoothly with the medication moving forward.

"The member expressed much gratitude for our assistance. Our MCA team will continue to check in with her each month to ensure everything goes smoothly."

MCA Statistics & Case Study

Q3 2024

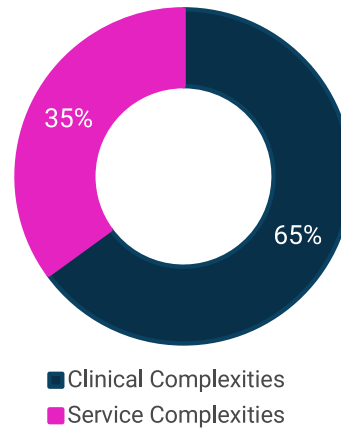
91 of PACE's patients were identified as having care complexities

Total Member Calls
32

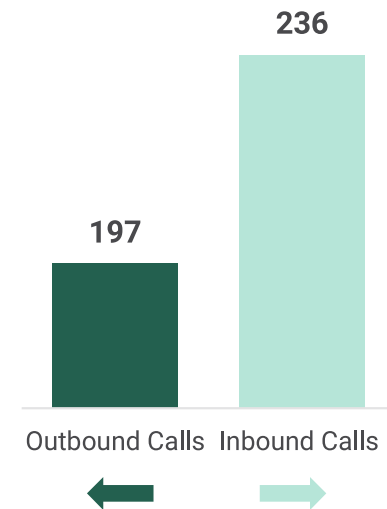
Total Prescriber Calls
117

Total Pharmacy Calls
20

Member Complexities
91 Total Enrollees



Inbound/Outbound Calls



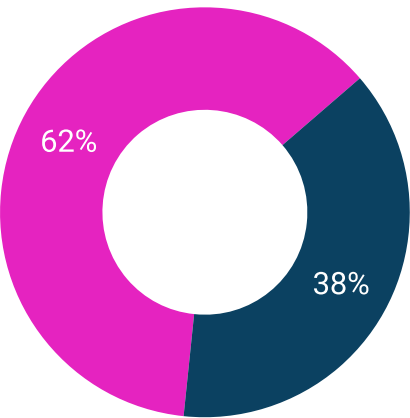
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Your Service Experience Dashboard

Jan – Jun 2024

Benefit Utilizers

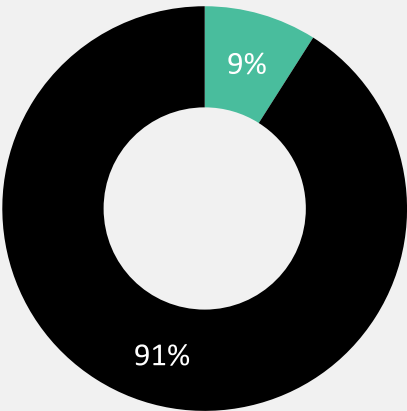
Utilizers (1,519), Non-Utilizers (897)



- Utilizers
- Non Utilizers

Customer Service Utilizers

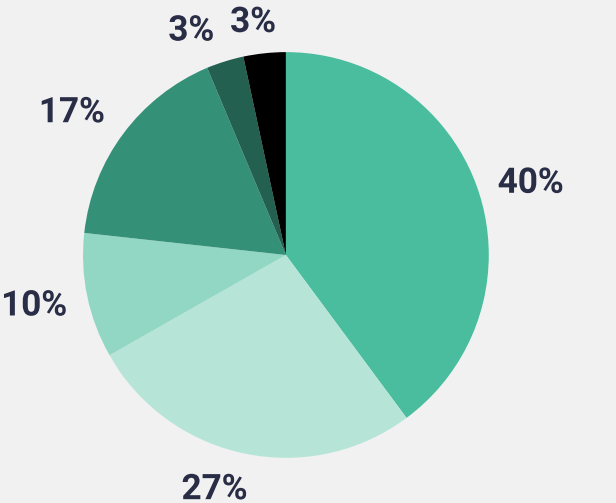
Total Callers: 215



- Calls Received
- No Calls

Call Stratification

Total Calls: 563



- Order Inquiries
- Claim Inquiries
- Account Inquiries
- Benefits Inquiries
- Member Materials
- Other

Solutions

Specialty Cost Containment

Deep specialty savings wrapped with a layer of clinical appropriateness and health safety.



Specialty Cost Containment

EmpiRx Health & Payer Matrix drive a seamless experience

- Payer Matrix receives patient information from EmpiRx Health
- Member is handheld through the application process
- Funding application submitted
- Alternate funding approved
- Dedicated Member Care Advocate – clinical concierge for members with complex care needs

**Specialty Cost
Containment Plan
Savings Achieved**
(Jan 2023 – Aug 2024)

\$1,249,628

SCC Utilizers
32

SCC Claims
207

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Clinical Insights

29% of plan spend attributed to GLP-1 receptor agonists

Diabetes		
Utilizers	Claims	Plan Paid
61	387	\$391,116

Weight Loss		
Utilizers	Claims	Plan Paid
84	338	\$410,208

GLP-1 Clinical Savings: \$43,027

Clinical Insights

Jan – Sept 2024

GLP-1 & Weight Loss Phase III Clinical Trials

Generic Name	Route	Mechanism of Action	Indication	Brand Company
Cagrilintide & Semaglutide	Subcutaneous	Amylin analog & GLP-1 agonist	Weight Loss & Type 2 Diabetes	Novo Nordisk
Efpeglenatide	Subcutaneous	GLP-1 agonist	Type 2 Diabetes	Hanmi Pharmaceutical
Insulin Icodec & Semaglutide	Subcutaneous	Insulin & GLP-1 agonist	Type 2 Diabetes	Novo Nordisk
Orforglipron	Oral	GLP-1 agonist	Type 2 Diabetes & Weight Loss	Eli Lilly; Chugai
Retatrutide	Subcutaneous	Glucagon receptor agonist & GLP-1 agonist & GIP receptor agonist	Weight Loss & Type 2 Diabetes	Eli Lilly
Semaglutide	Oral	GLP-1 agonist	Weight Loss	Novo Nordisk
Survodutide	Subcutaneous	Glucagon receptor agonist & GLP-1 agonist	Weight Loss & Type 2 Diabetes	Boehringer Ingelheim; Zealand Pharma

Biosimilars

Low-Cost Biosimilar Strategy

Non-specialty Products (2021)

Lantus, Semglee, Rezvoglar

Launched 5%-65% discount

Specialty Physician- Administered (2015)

Neupogen, Remicade, Rituxan, Avastin, Herceptin

Launched 15%-40% discount

Specialty Self- Administered (2023)

Humira

Launched 5%-86% discount

Specialty Pipeline

- Stelara (multiple indications) 2025
- Prolia (Osteoporosis) 2025
- Tysabri (Multiple Sclerosis) TBD
- Enbrel (multiple indications) 2029

Key Considerations

- Clinical Attribute (interchangeability, concentration, bio-betters)
- Supply Chain
- Patient Copay Assistance
- Cost
- Administration
- Pharmacy Network

Pipeline/Market Events

Pipeline monitoring tailored to your population identifies activity that impacts plan spend

Top New to Market Brands

Brand (generic)	Indication	Launch Date	Projected Utilizers	Projected Annual Impact
Zegalogue (Dasiglucagon)	Congenital hyperinsulinism (CHI)	12/30/2023	4	\$131

Top New Drug Indications

Brand (generic)	Indication	Launch Date	Projected Utilizers	Projected Annual Impact
Imcivree (Setmelanotide Acetate)	Obesity*	12/26/2024	26	\$9,770,904
Lumakras (Sotorasib)	Colorectal cancer*	10/17/2024	1	\$256,912
Vectibix (Panitumumab)	Colorectal cancer*	10/17/2024	1	\$242,243

Top New to Market Generics

Brand (generic)	Indication	Launch Date	Projected Utilizers	Projected Annual Impact
Brilinta 90-mg Tablets (ticagrelor)	Reduce risk of myocardial infarction, stroke	5/1/2025	2	(\$17,918)
Brilinta 60-mg Tablets (ticagrelor)	Reduce risk of myocardial infarction, stroke	5/1/2025	1	(\$8,307)
Xarelto (rivaroxaban) (rivaroxaban)	Deep vein thrombosis or acute pulmonary embolism	3/1/2025	4	(\$3,909)

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Thank you.

 **EMPIRX HEALTH**
Customer-First Pharmacy Care.

Key Stats

DESCRIPTION	FY 2022	FY 2023	TREND % (2022 vs. 2023)	Jan – Sept 2024
Average Members	2,372	2,507	5.7%	2,416
Utilizers	1,612	1,662	3.1%	1,519
Total Claims	24,119	26,385	9.4%	21,056
Total Paid (Gross Cost)	\$4,179,962	\$3,255,896	-22.1%	\$3,136,234
Plan Paid	\$3,893,341	\$2,874,222	-26.2%	\$2,808,752
Plan Paid PMPM	\$136.77	\$95.54	-30.1%	\$129.19
Non-specialty PMPM	\$48.03	\$61.93	28.9%	\$83.61
Specialty PMPM	\$88.74	\$33.61	-62.1%	\$45.58
Specialty Claim Count	377	266	-29.4%	234
Specialty as a % of Total Plan Paid	64.9%	35.2%	-45.8%	35.3%
Generic Dispensing Rate	88.9%	89.7%	0.9%	88.1%
Mail Order Penetration Rate	5.8%	5.7%	-1.7%	5.1%

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EmpiRx Health

Monthly Reporting Package

PACE

January 2024 - October 2024

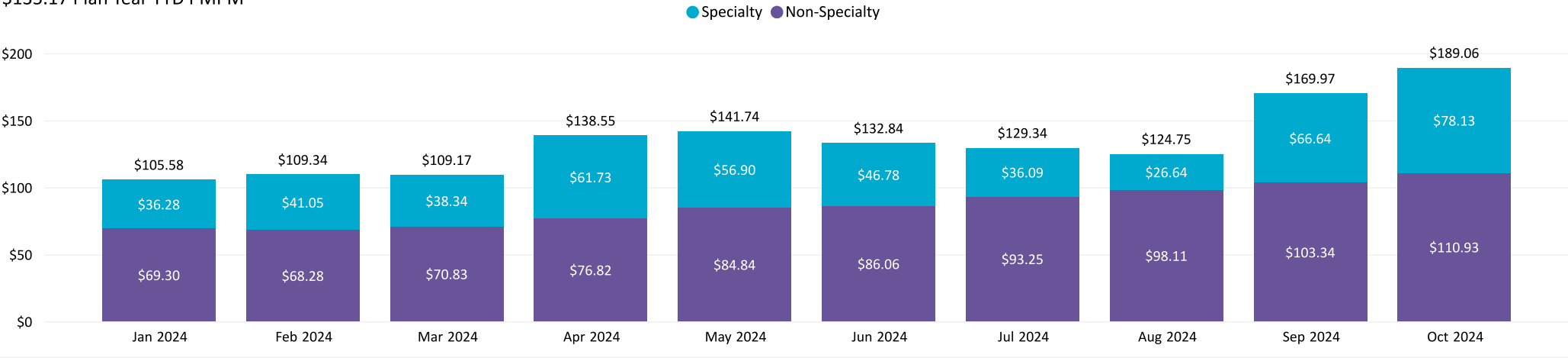
THIS REPORT REPRESENTS THE FIGURES AT THE TIME THE REPORT WAS GENERATED AND IS SUBJECT TO CHANGE.

Plan Paid

January 2024 - October 2024

Plan Paid Per Member Per Month (PMPM)

\$135.17 Plan Year YTD PMPM



Plan Paid by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Total YTD
Plan Paid	\$255,391	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$415,416	\$463,194	\$3,269,883
Specialty Plan Paid	\$87,758	\$98,240	\$91,719	\$147,959	\$136,727	\$112,232	\$87,868	\$65,512	\$162,858	\$191,417	\$1,182,291
Non-Specialty Plan Paid	\$167,633	\$163,400	\$169,420	\$184,148	\$203,868	\$206,462	\$227,070	\$241,257	\$252,558	\$271,776	\$2,087,592
Retail Plan Paid	\$154,159	\$156,781	\$165,522	\$180,392	\$207,764	\$200,244	\$233,629	\$237,682	\$242,128	\$273,605	\$2,051,906
Mail Plan Paid	\$101,233	\$104,859	\$95,617	\$151,715	\$132,831	\$118,450	\$81,309	\$69,086	\$173,288	\$189,588	\$1,217,977

Specialty Utilization

January 2024 - October 2024

1.1%

of Total Claims

36.2%

of Plan Paid YTD

49

Unique Utilizers YTD

Specialty Metrics by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Total or Average YTD
Specialty as % of Total Claims	1.0%	1.1%	1.3%	1.3%	1.4%	1.2%	0.9%	0.7%	1.1%	1.2%	1.1%
Total Claims	2,456	2,204	2,196	2,365	2,477	2,245	2,393	2,361	2,350	2,363	23,410
Specialty Claims	25	24	29	31	34	26	22	17	26	29	263
Specialty as % of Total Plan Paid	34.4%	37.5%	35.1%	44.6%	40.1%	35.2%	27.9%	21.4%	39.2%	41.3%	36.2%
Total Plan Paid	\$255,391	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$415,416	\$463,194	\$3,269,883
Specialty Plan Paid	\$87,758	\$98,240	\$91,719	\$147,959	\$136,727	\$112,232	\$87,868	\$65,512	\$162,858	\$191,417	\$1,182,291
Total Utilizers	830	788	768	796	808	795	788	801	796	822	799
Specialty Utilizers	24	24	24	27	28	23	19	17	23	29	24

Specialty Cost Containment Metrics

January 2024 - October 2024

Specialty Cost Containment powered by Payer Matrix

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Total YTD
Alternate Funding	\$110,653	\$116,177	\$40,869	\$147,377	\$44,693	\$33,406	\$74,304	\$74,351	\$43,065	\$684,896
SCC Claims	13	10	9	15	4	5	10	10	6	82
Plan Savings	\$88,522	\$92,942	\$32,696	\$117,902	\$35,754	\$26,725	\$59,443	\$59,481	\$34,452	\$547,917
SCC Utilizers	12	9	9	11	4	5	8	10	5	27

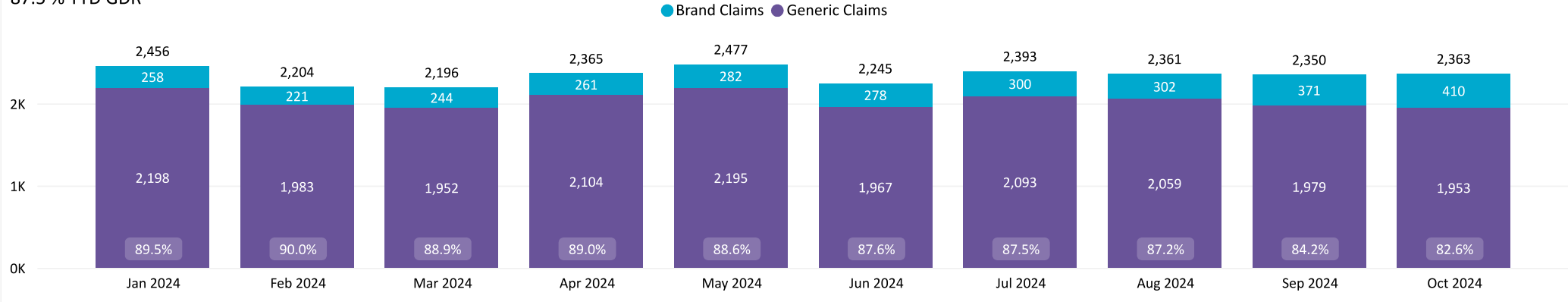
- Notes:**
- 1. Patient Assistance Programs (PAPs) dramatically reduce specialty spend using manufacturer-driven funding mechanisms
 - 2. Figures above represent data at the time that the report was generated and are subject to change
 - 3. Prior month data may not be visible due to reporting lag times

Utilization by Drug Type

January 2024 - October 2024

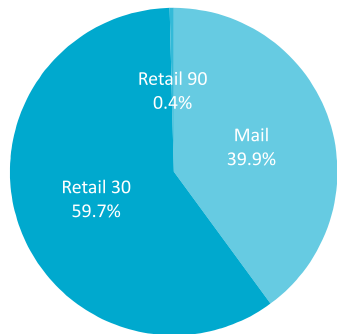
Brand and Generic Dispensing Rate (GDR) by Month

87.5 % YTD GDR



Brand Plan Paid by Channel

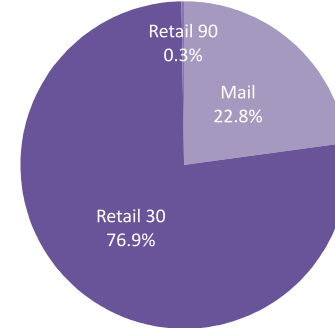
\$2,759,310 Brand Plan Paid YTD



● Mail ● Retail 30 ● Retail 90

Generic Plan Paid by Channel

\$510,573 Generic Plan Paid YTD



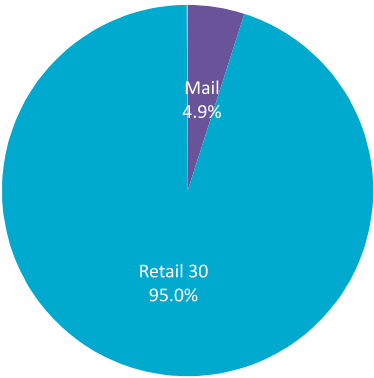
● Mail ● Retail 30 ● Retail 90

Utilization by Channel

January 2024 - October 2024

All Claims by Channel

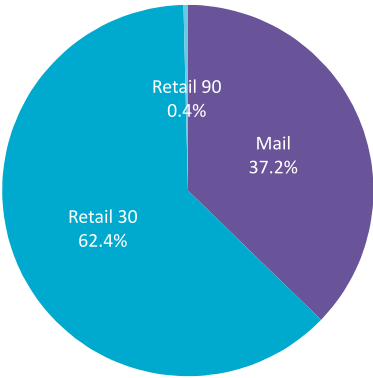
23,410 Total Claims YTD



● Mail ● Retail 30 ● Retail 90

Plan Paid by Channel

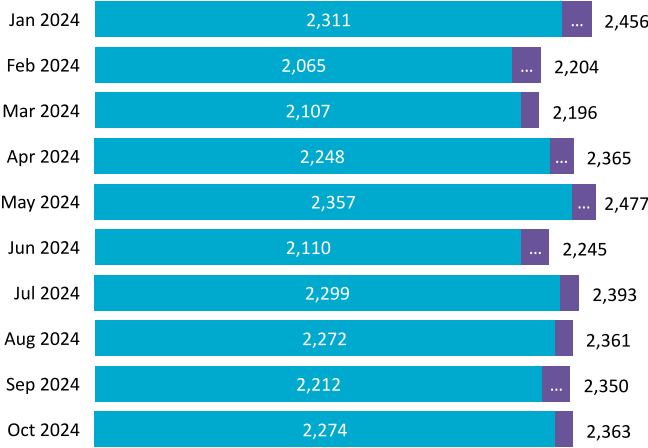
\$3,269,883 Total Plan Paid YTD



● Mail ● Retail 30 ● Retail 90

Retail and Mail Claims by Month

4.9 % Mail Order Penetration Rate



● Retail ● Mail

Plan Paid by Channel by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Total YTD
Retail 30 Plan Paid	\$151,399	\$156,598	\$165,188	\$177,633	\$207,581	\$200,093	\$230,687	\$237,499	\$242,052	\$270,794	\$2,039,522
Retail 90 Plan Paid	\$2,759	\$183	\$335	\$2,759	\$183	\$152	\$2,943	\$183	\$76	\$2,812	\$12,384
Mail Plan Paid	\$101,233	\$104,859	\$95,617	\$151,715	\$132,831	\$118,450	\$81,309	\$69,086	\$173,288	\$189,588	\$1,217,977
Total Plan Paid	\$255,391	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$415,416	\$463,194	\$3,269,883

Members and Utilizers

January 2024 - October 2024

2,419

Average Monthly Members

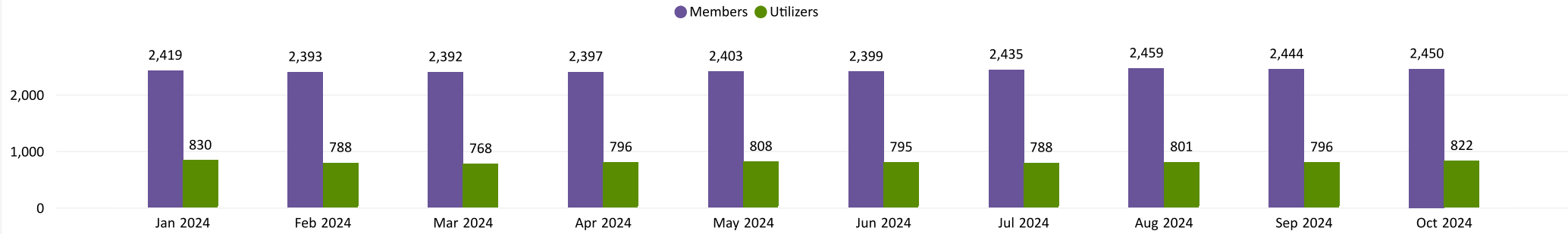
1,588

Unique Utilizers YTD

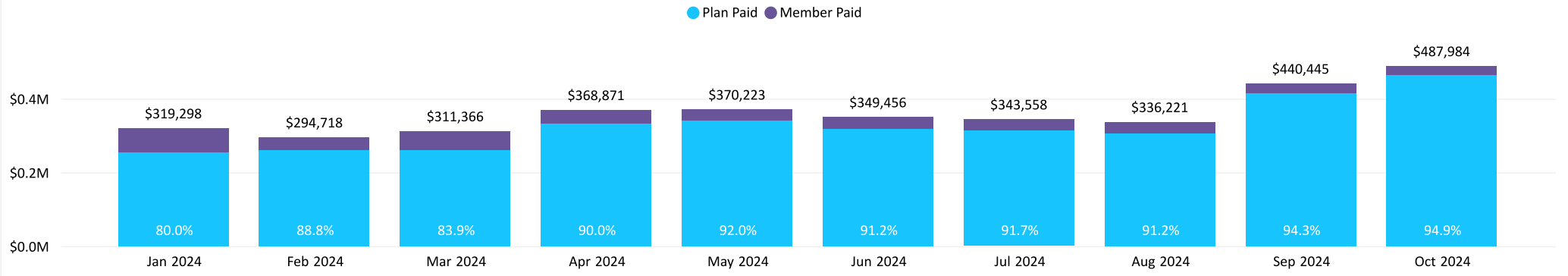
9.7%

Member Cost Share YTD

Members and Utilizers by Month



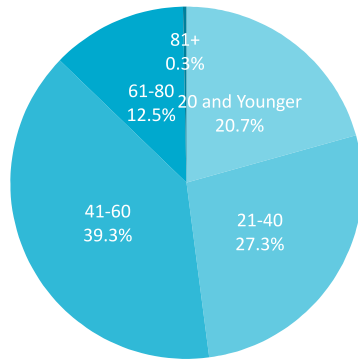
Plan Paid and Member Paid by Month



Demographics

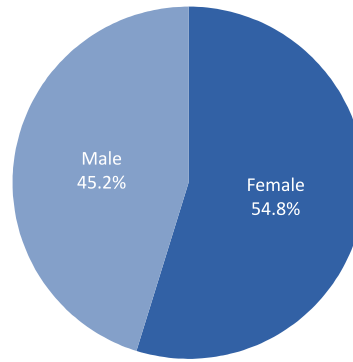
January 2024 - October 2024

All Utilizers by Age Group



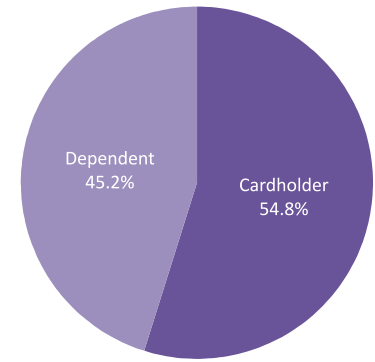
20 and Younger 21-40 41-60 61-80 81+

All Utilizers by Gender



Female Male

All Utilizers by Member Type



Cardholder Dependent

Specialty and Non-Specialty Utilizers by Age Group

Age Group	Non-Specialty Utilizers	Specialty Utilizers
20 and Younger	328	4
21-40	431	10
41-60	623	28
61-80	198	6
81+	5	1
Total	1,585	49

Specialty and Non-Specialty Utilizers by Gender

Gender	Non-Specialty Utilizers	Specialty Utilizers
Female	868	27
Male	717	22
Total	1,585	49

Specialty and Non-Specialty Utilizers by Member Type

Member Type	Non-Specialty Utilizers	Specialty Utilizers
Cardholder	869	33
Dependent	716	16
Total	1,585	49

Top Members by Plan Paid

January 2024 - October 2024

Top 20 Members by Plan Paid YTD

Member Rank	Top Utilized Drug Name	Top Drug Brand / Generic	Top Drug Specialty / Non-Specialty	Top Drug Claim Count	Top Drug Plan Paid	All Other Claim Count	All Other Plan Paid	Total Plan Paid	Total Plan Paid as % of Total YTD
1	TREMFYA	Brand	Specialty	6	\$83,170	7	\$9,220	\$92,389	2.8%
2	MAYZENT	Brand	Specialty	9	\$74,596	4	\$619	\$75,215	2.3%
3	SKYRIZI PEN	Brand	Specialty	3	\$62,661	6	\$9,358	\$72,019	2.2%
4	SKYRIZI PEN	Brand	Specialty	3	\$63,359	18	\$2,133	\$65,492	2.0%
5	SKYRIZI PEN	Brand	Specialty	3	\$62,602	3	\$38	\$62,640	1.9%
6	KESIMPTA	Brand	Specialty	9	\$61,915	4	\$243	\$62,158	1.9%
7	HUMIRA PEN	Brand	Specialty	6	\$40,636	3	\$20,893	\$61,528	1.9%
8	ENBREL SURECLICK	Brand	Specialty	9	\$54,656	11	\$485	\$55,141	1.7%
9	TALTZ	Brand	Specialty	8	\$51,264	1	\$9	\$51,273	1.6%
10	RINVOQ	Brand	Specialty	4	\$47,803	7	\$1,662	\$49,466	1.5%
11	CIMZIA	Brand	Specialty	5	\$25,950	9	\$21,988	\$47,938	1.5%
12	HUMIRA PEN	Brand	Specialty	4	\$27,146	11	\$20,126	\$47,272	1.4%
13	LEDIPASVIR-SOFOSBUVIR	Generic	Specialty	2	\$23,040	16	\$19,920	\$42,960	1.3%
14	SKYRIZI PEN	Brand	Specialty	2	\$42,071	2	\$732	\$42,803	1.3%
15	BENLYSTA	Brand	Specialty	9	\$40,553	5	\$148	\$40,701	1.2%
16	RINVOQ	Brand	Specialty	4	\$25,481	15	\$14,243	\$39,723	1.2%
17	RINVOQ	Brand	Specialty	6	\$37,687	12	\$467	\$38,154	1.2%
18	RINVOQ	Brand	Specialty	5	\$31,659	19	\$1,985	\$33,644	1.0%
19	SKYRIZI PEN	Brand	Specialty	1	\$21,036	8	\$11,885	\$32,921	1.0%
20	COSENTYX SENSOREADY PEN	Brand	Specialty	4	\$23,650	13	\$7,306	\$30,956	0.9%

Top Rx by Plan Paid

October 2024

Top 20 Rx by Plan Paid Prior Month

Rank	Drug Name	Drug Class	Brand / Generic	Specialty / Non-Specialty	Claim Count	Plan Paid	Member Paid	Total Paid Per Claim	Total Paid
1	WEGOVY	Anti-Obesity Agents	Brand	Non-Specialty	52	\$65,839	\$2,535	\$1,315	\$68,374
2	SKYRIZI	Antipsoriatics	Brand	Specialty	3	\$63,257	\$0	\$21,086	\$63,257
3	ZEPBOUND	Anti-Obesity Agents	Brand	Non-Specialty	29	\$28,887	\$1,280	\$1,040	\$30,167
4	RINVOQ	Antirheumatic - Enzyme Inhibitors	Brand	Specialty	3	\$19,298	\$0	\$6,433	\$19,298
5	ENBREL	Soluble Tumor Necrosis Factor Receptor Agents	Brand	Specialty	2	\$15,220	\$150	\$7,685	\$15,370
6	MOUNJARO	Incretin Mimetic Agents	Brand	Non-Specialty	12	\$14,127	\$340	\$1,206	\$14,467
7	TREMFYA	Antipsoriatics	Brand	Specialty	1	\$13,834	\$150	\$13,984	\$13,984
8	HUMIRA	Anti-TNF-alpha - Monoclonal Antibodies	Brand	Specialty	2	\$13,656	\$0	\$6,828	\$13,656
9	PAXLOVID	Antiviral Combinations	Brand	Non-Specialty	9	\$12,605	\$224	\$1,425	\$12,829
10	LEDIPASVIR-SOFOSBUVIR	Hepatitis Agents	Generic	Specialty	1	\$11,520	\$0	\$11,520	\$11,520
11	OZEMPIC	Incretin Mimetic Agents	Brand	Non-Specialty	12	\$11,097	\$310	\$951	\$11,407
12	KESIMPTA	Multiple Sclerosis Agents	Brand	Specialty	1	\$8,655	\$150	\$8,805	\$8,805
13	JARDIANCE	Sodium-Glucose Co-Transporter 2 (SGLT2) Inhibitors	Brand	Non-Specialty	13	\$7,490	\$310	\$600	\$7,800
14	DIMETHYL	Multiple Sclerosis Agents	Generic	Specialty	1	\$7,329	\$0	\$7,329	\$7,329
15	OZEMPIC	Incretin Mimetic Agents	Brand	Non-Specialty	4	\$7,230	\$110	\$1,835	\$7,340
16	MAYZENT	Multiple Sclerosis Agents	Brand	Specialty	1	\$7,018	\$3,008	\$10,026	\$10,026
17	TALTZ	Antipsoriatics	Brand	Specialty	1	\$6,971	\$0	\$6,971	\$6,971
18	OZEMPIC	Incretin Mimetic Agents	Brand	Non-Specialty	7	\$6,474	\$180	\$951	\$6,654
19	ELIQUIS	Direct Factor Xa Inhibitors	Brand	Non-Specialty	10	\$5,726	\$110	\$584	\$5,836
20	CIMZIA	Inflammatory Bowel Agents	Brand	Specialty	1	\$5,615	\$0	\$5,615	\$5,615

Top Rx by Claim Count

October 2024

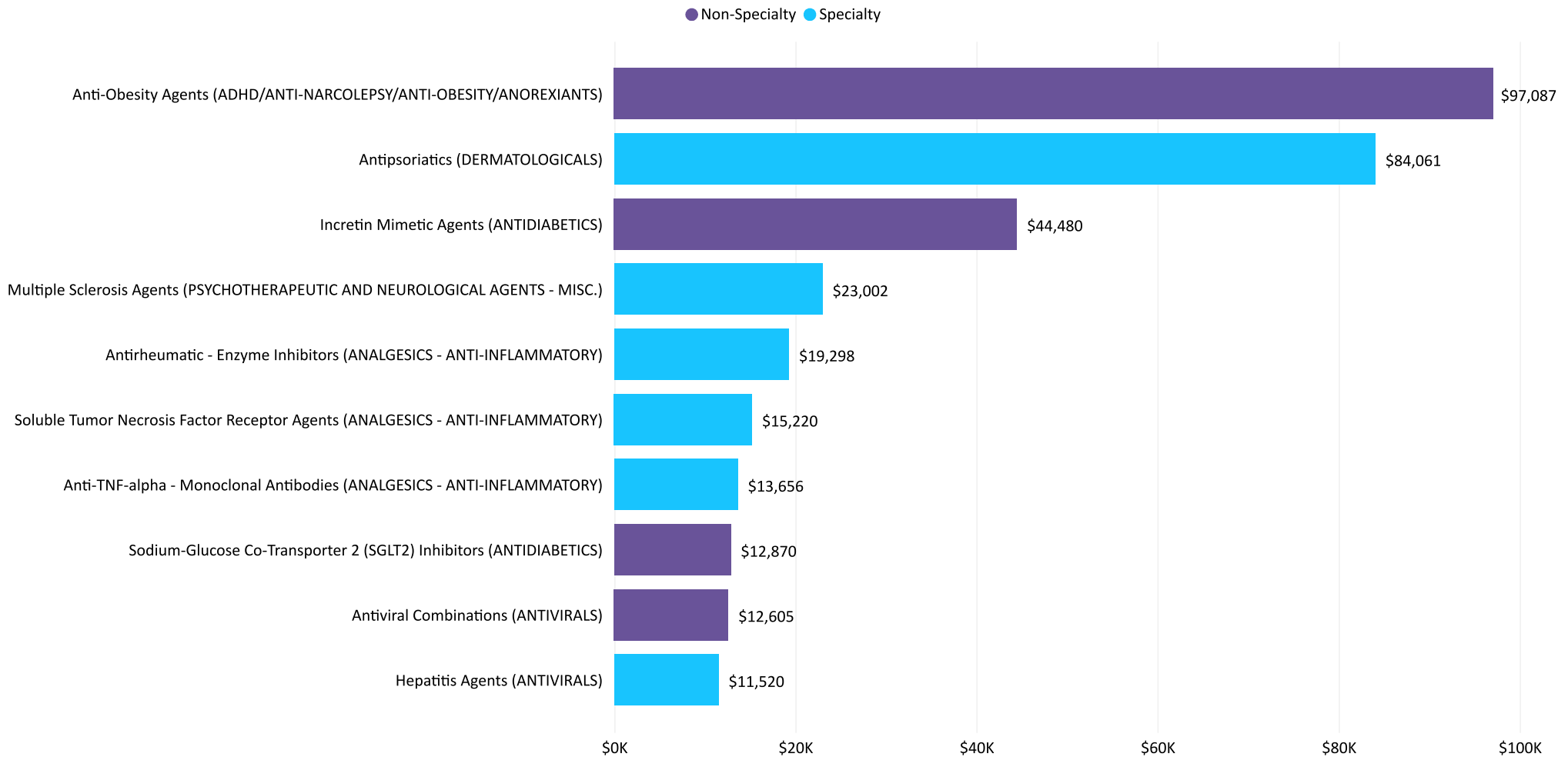
Top 20 Rx by Claim Count Prior Month

Rank	Drug Name	Drug Class	Brand / Generic	Specialty / Non-Specialty	Claim Count	Plan Paid	Member Paid	Total Paid Per Claim	Total Paid
1	ATORVASTATIN	HMG CoA Reductase Inhibitors	Generic	Non-Specialty	77	\$439	\$42	\$6	\$481
2	LEVOTHYROXINE	Thyroid Hormones	Generic	Non-Specialty	71	\$336	\$588	\$13	\$924
3	LISINOPRIL	ACE Inhibitors	Generic	Non-Specialty	69	\$128	\$348	\$7	\$476
4	LOSARTAN	Angiotensin II Receptor Antagonists	Generic	Non-Specialty	53	\$45	\$318	\$7	\$362
5	WEGOVY	Anti-Obesity Agents	Brand	Non-Specialty	52	\$65,839	\$2,535	\$1,315	\$68,374
6	AMLODIPINE	Calcium Channel Blockers	Generic	Non-Specialty	50	\$8	\$124	\$3	\$132
7	ROSUVASTATIN	HMG CoA Reductase Inhibitors	Generic	Non-Specialty	44	\$407	\$8	\$9	\$415
8	METFORMIN	Biguanides	Generic	Non-Specialty	44	\$28	\$185	\$5	\$213
9	OMEPRAZOLE	Proton Pump Inhibitors	Generic	Non-Specialty	40	\$29	\$156	\$5	\$185
10	ESCITALOPRAM	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	39	\$25	\$171	\$5	\$196
11	METOPROLOL	Beta Blockers Cardio-Selective	Generic	Non-Specialty	34	\$362	\$293	\$19	\$655
12	IBUPROFEN	Nonsteroidal Anti-inflammatory Agents (NSAIDs)	Generic	Non-Specialty	34	\$32	\$165	\$6	\$197
13	ALBUTEROL	Sympathomimetics	Generic	Non-Specialty	31	\$1,121	\$306	\$46	\$1,427
14	ZEPBOUND	Anti-Obesity Agents	Brand	Non-Specialty	29	\$28,887	\$1,280	\$1,040	\$30,167
15	SERTRALINE	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	26	\$9	\$102	\$4	\$111
16	ESTRADIOL	Estrogens	Generic	Non-Specialty	25	\$1,353	\$234	\$63	\$1,587
17	MONTELUKAST	Leukotriene Modulators	Generic	Non-Specialty	25	\$78	\$196	\$11	\$275
18	FLUOXETINE	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	24	\$249	\$131	\$16	\$380
19	HYDROCHLOROTHIAZIDE	Thiazides and Thiazide-Like Diuretics	Generic	Non-Specialty	23	\$31	\$66	\$4	\$96
20	BUPROPION	Antidepressants - Misc.	Generic	Non-Specialty	22	\$579	\$180	\$35	\$760

Top Therapeutic Classes

October 2024

Top 10 Therapeutic Classes by Plan Paid Prior Month



**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Wellness Updates

ITEM #: 2024-024

Enclosure: Yes

Category: Financial

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

In partnership with the PACE health plans, KeenanWell Health Management consultants help agencies in the PACE JPA design and implement programs that create, support, and maintain wellness cultures specifically tailored to each organization's unique needs, and provide coordination and alignment of wellness components to assure program integrity. Participation in Wellness (Health Management) is a condition of membership in PACE.

STATUS:

The Full Board will hear and discuss a report on the 2024 Health Management program and the upcoming 2025 Health Management program Launch.

RECOMMENDATIONS:

For review, discussion, and action as necessary.

Wellness Update

PACE Full Board Meeting 12/12/24

- **2024 PACE Wellness Program – February 1 – November 15, 2024**
 - Participation Updates:
 - 3,786 total PACE Members currently on eligibility file.
 - **203 participants (5%) registered for the 2024 PACE Wellness Program.**
 - Status:
 - Employees – 190
 - Spouses – 13
 - Carriers:
 - Anthem –155
 - Kaiser – 34
 - Default – 14 (need to add carrier information)
 - Rewards Update:
 - 108 participants reached rewards status!
 - Bronze (\$50 reward) – 600-899 points – 8 participants
 - Silver (\$100 reward) – 900-1,199 points – 15 participants
 - Gold (\$125 reward) – 1,200-1,699 points – 25 participants
 - Platinum (\$175 reward) – 1,700+ points – 60 participants
 - 28 of the 34 agencies (82%) have PACE members participating in the program.
 - See page 3 for breakdown by agency.

For reference: Wellness Program Participation 2020-2024

Year	Number on Eligibility File	Registered (% eligible)	Earned Rewards (% registered; % eligible)
2024	3,786	203 (5%)	108 (53%; 3%)
2023	2,795	182 (7%)	56 (30%; 2%)
2022	2,629	188 (7%)	55 (29%; 2%)
2021	1,884	198 (11%)	59 (30%; 3%)
2020	1,514	152 (10%)	108 (71%; 7%)*

* In 2020, we had 152 registered and 108 earned rewards (points were transferred over from MCSIG's program and the biometric screening was not a required activity in 2020).

- **Rewards**
 - E-gift card rewards will be emailed to participants by mid-December.
 - Mariah will provide the benefits representatives with list of names for taxation purposes after e-gift cards have been emailed out.

- **Follow-Up: Fourth and FINAL Campaign – Walktober Challenge**

- Dates: October 1-31, 2024
- Registration closed on October 11.
- Participation:
 - 206 total registrants (183 employees, 23 household members)
 - 184 registrants used the Walktober App.
 - 28 official teams of 4-5 members.
 - 133 participants (65%) reached the challenge goal.
- Goal was to walk 6,000 steps or more per day to earn points (or fall leaves).
- Prizes were sent out in early November to all drawing winners.
- Top 3 Agencies that had the highest participation:
 - Redwood Coast Energy Authority – 28 participants
 - Superior Court of California, Sutter County – 23 participants
 - Truckee Donner Rec & Park – 21 participants



- **Follow-Up: Wellness Advisory Committee Meeting on Wednesday, December 4, 2024:**

- Representatives from 8 agencies attended.

- **Personify Health Wellness Program (formally Virgin Pulse) – Launches January 1, 2025**

- Communications
 - PACE 2025 Personify Health Enrollment Teaser Flyer
 - PACE 2025 Personify Health 'It's Live' Email
 - PACE 2025 Personify Health Enrollment Program Guide Flyer
- To earn rewards each quarter:
 - 1,000 points = \$0 reward
 - 5,000 points = \$0 reward
 - 12,000 points = \$25 reward
 - 20,000 points = \$25 reward
 - Reward Cash annual max: \$50 x 4 quarters = \$200

- **Items to show:**

- 2024 Annual Report from WellSteps
- Walktober Challenge – End of Program Report

- **Next Wellness Advisory Committee Meeting on Wednesday, February 5, 2025 – 3-4pm PT.**

2024 PACE Wellness Program Registration Numbers (as of 12/4/2024)		
Location	Carrier	Count
3050-HASLO	ANTHEM	8
CARMEL AREA WASTEWATER DISTRICT	ANTHEM	2
CARMEL AREA WASTEWATER DISTRICT	default	1
CITY OF AVENAL	ANTHEM	2
CITY OF CLAREMONT	ANTHEM	1
CITY OF CLAREMONT	KAISER	4
City of Corcoran	ANTHEM	2
CITY OF DESERT HOT SPRINGS	ANTHEM	12
CITY OF DOS PALOS	ANTHEM	1
CITY OF FOWLER	ANTHEM	7
City of Gustine	ANTHEM	4
City of Lemoore	ANTHEM	2
City of Lemoore	KAISER	1
CITY OF LINDSAY	ANTHEM	7
CITY OF LIVINGSTON	ANTHEM	8
City of Newman	ANTHEM	4
City of Newman	KAISER	2
CITY OF SANGER	ANTHEM	6
CITY OF SANGER	KAISER	4
City of Upland	ANTHEM	11
Compass Charter Schools	ANTHEM	1
Compass Charter Schools	default	7
EL DORADO SUPERIOR COURTS	ANTHEM	5
EL DORADO SUPERIOR COURTS	KAISER	3
HASLO	ANTHEM	5
HUMBOLDT BAY FIRE	ANTHEM	5
MODOC COUNTY	ANTHEM	3
REDWOOD COAST ENERGY AUTHORITY	ANTHEM	9
REGIONAL GOVERNMENT SERVICES	ANTHEM	6
REGIONAL GOVERNMENT SERVICES	default	3
Regional Government Services	KAISER	7
SAN BERNARDINO COUNTY EMPLOYEES RETIREMENT ASSOCIA	ANTHEM	11
SAN BERNARDINO COUNTY EMPLOYEES RETIREMENT ASSOCIA	KAISER	5
SUPERIOR COURT OF CALIFORNIA - COUNTY OF KINGS	ANTHEM	1
SUPERIOR COURT OF CALIFORNIA - SUTTER COUNTY	ANTHEM	1
SUPERIOR COURT OF CALIFORNIA COUNTY OF KINGS	ANTHEM	8
SUPERIOR COURT OF CALIFORNIA SUTTER COUNTY	ANTHEM	11
SUPERIOR COURT OF CALIFORNIA SUTTER COUNTY	KAISER	8
Superior Court of Mendocino County	ANTHEM	2
TOWN OF DANVILLE	KAISER	1
TOTAL		203

Program Results



Overall Stats

Logging: **October 1 - October 31, 2024**

Registered participants: **206**

Evaluations submitted: **78**

Evaluation submission percentage: **38%**

Participants on a team: **104**

Participants with 1 or more Friends: **96**

Mobile app downloads: **157**

**Leaves Earned:
4200**

Organization Leaf Goal: 2678



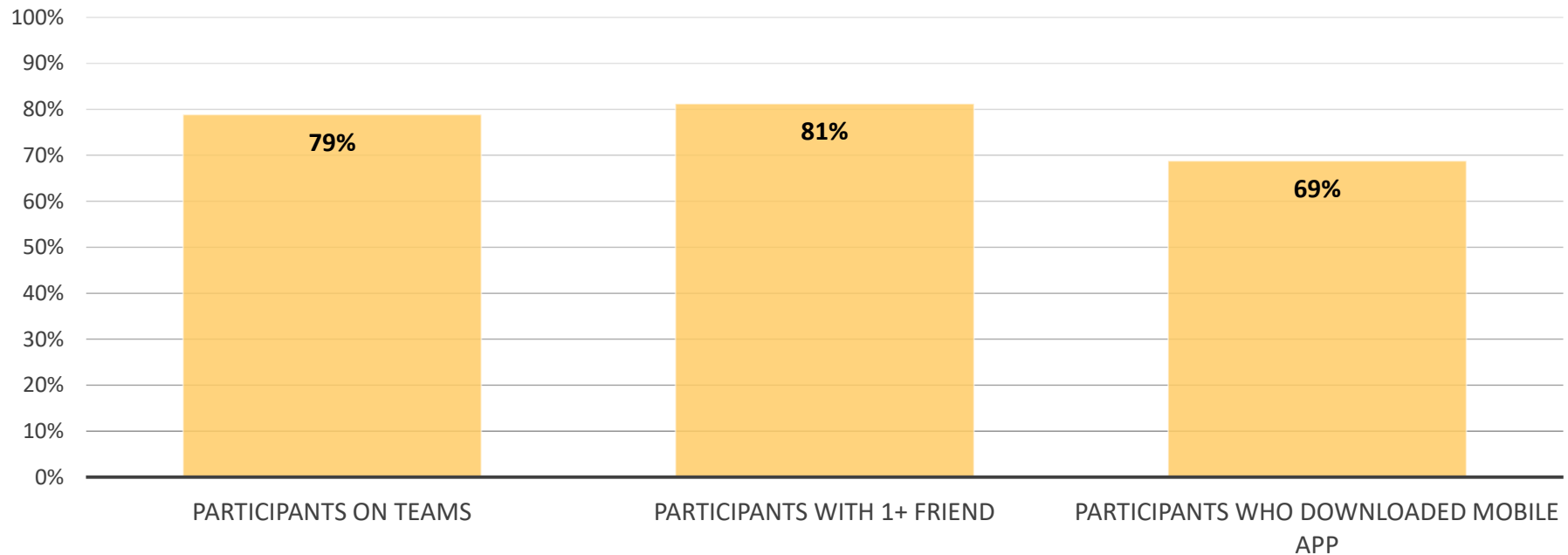
Program Goal and Achievement Rates

Goal is to earn 20 leaves by recording physical activity.

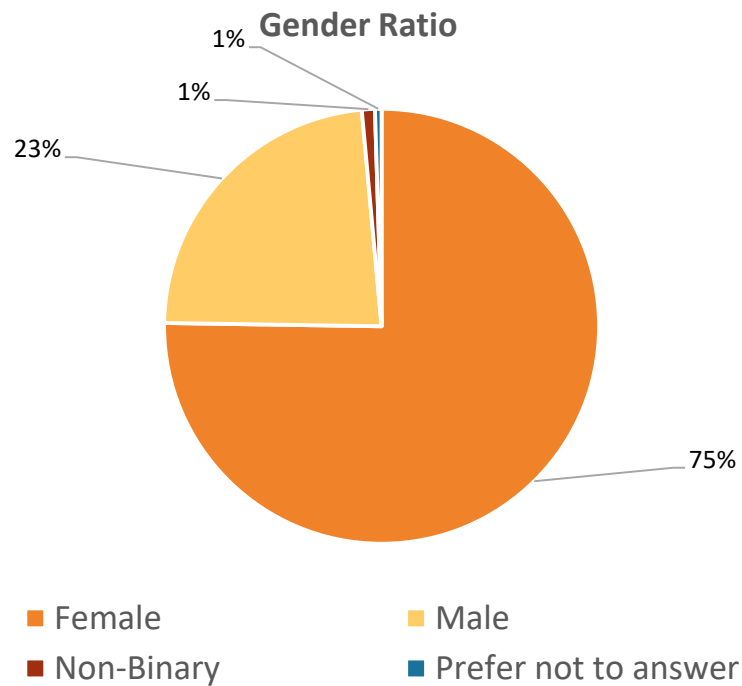
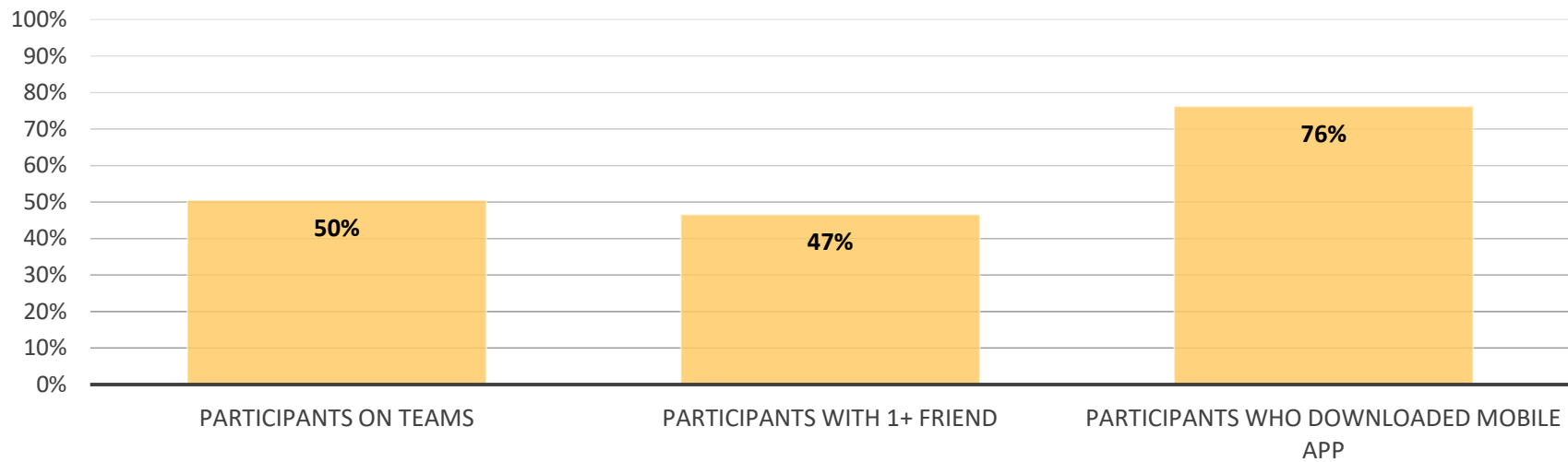
Achievement rates show the percentage of participants who met the program goal. The group with the most success meeting the goal is participants with +1 Friends.

Achievement Rates

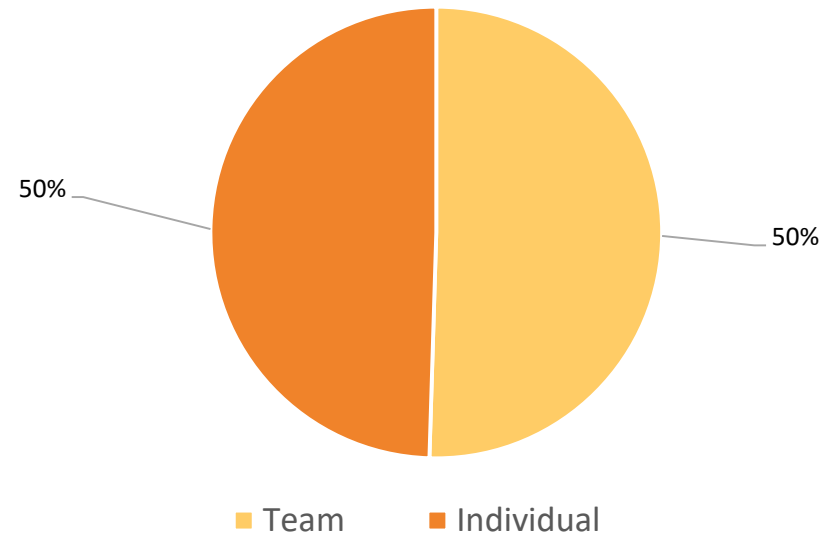
Overall achievement rate - 65%



Feature Utilization

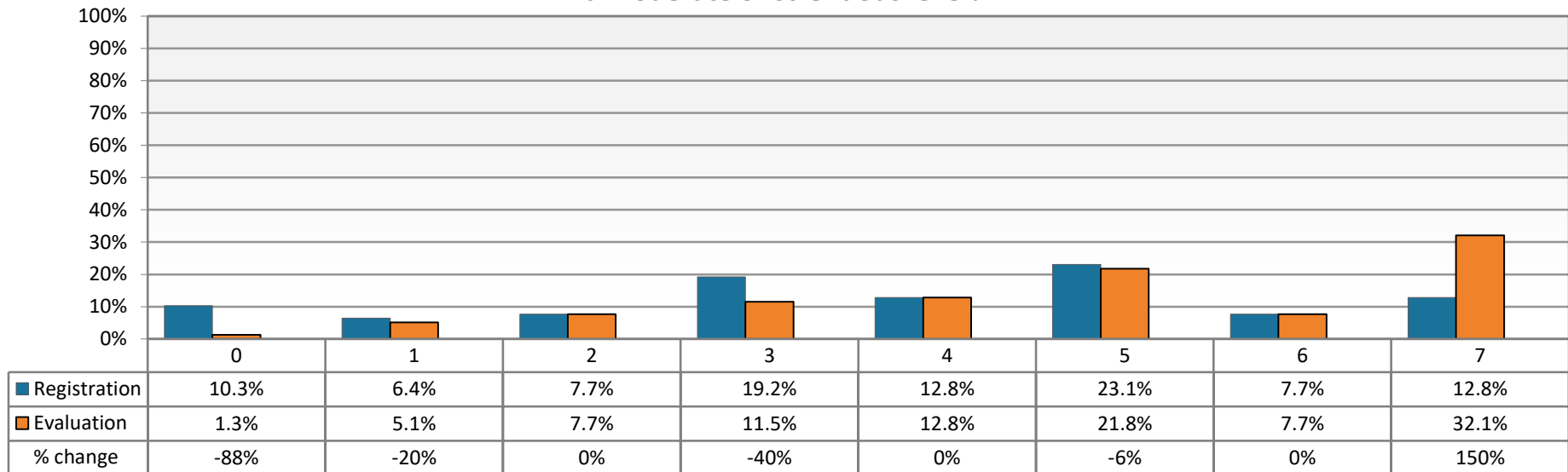


Team/Individual Participation

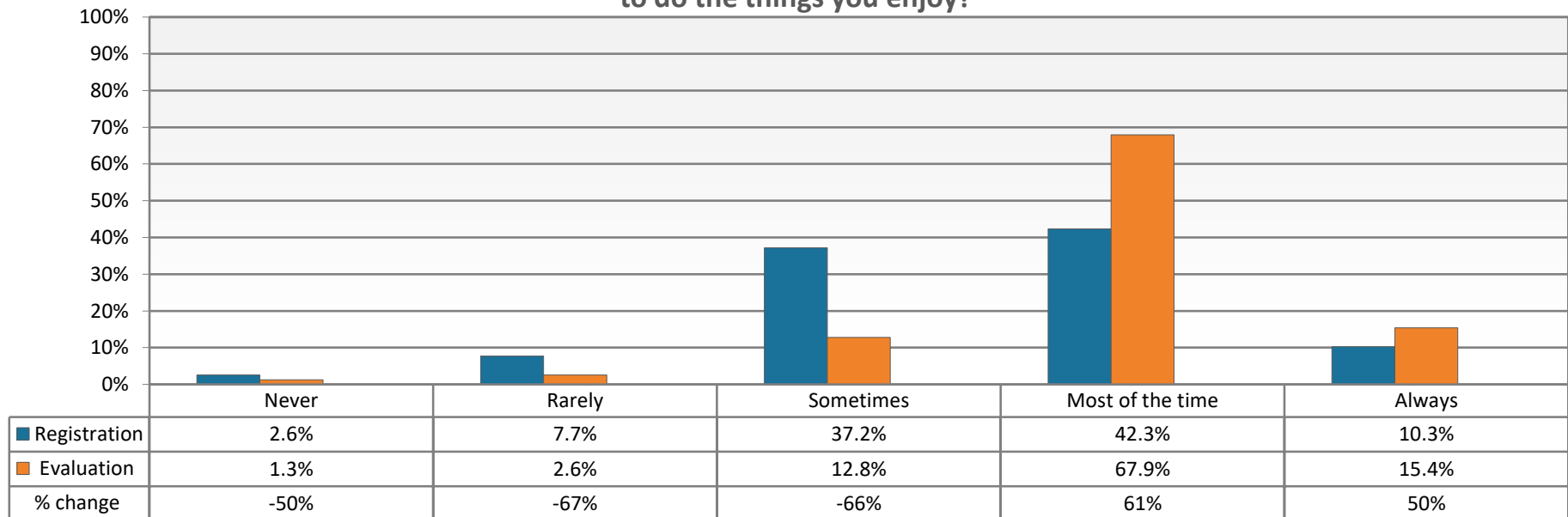


The following data is based on participants who completed the *Walktober* End of Program evaluation.

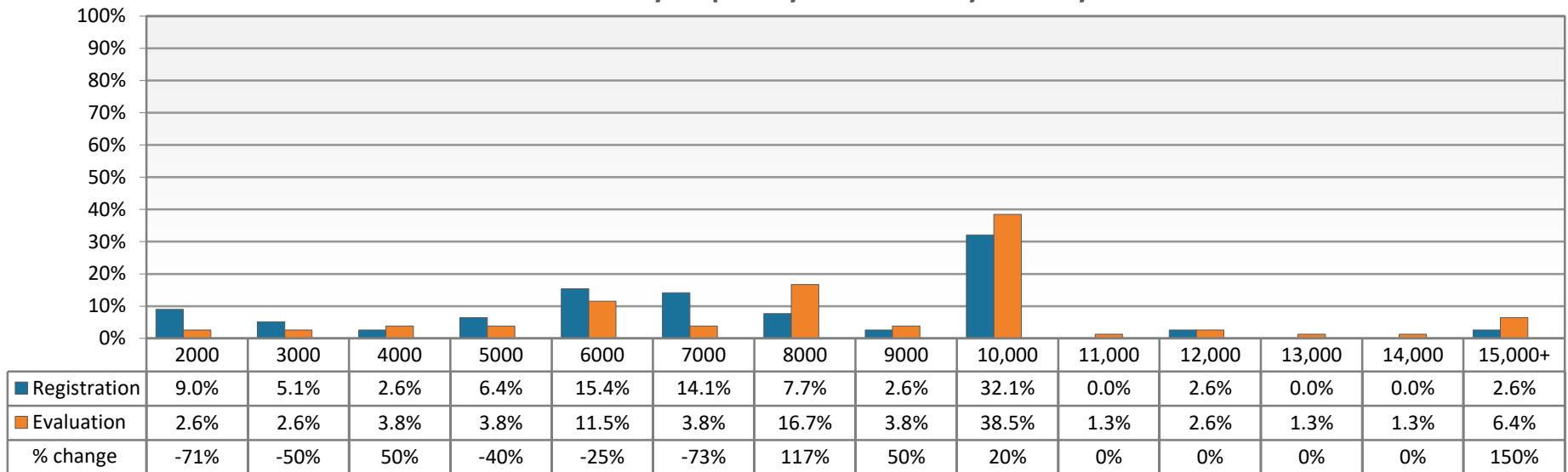
How many days each week do you exercise for at least 30 minutes at a moderate or strenuous level?



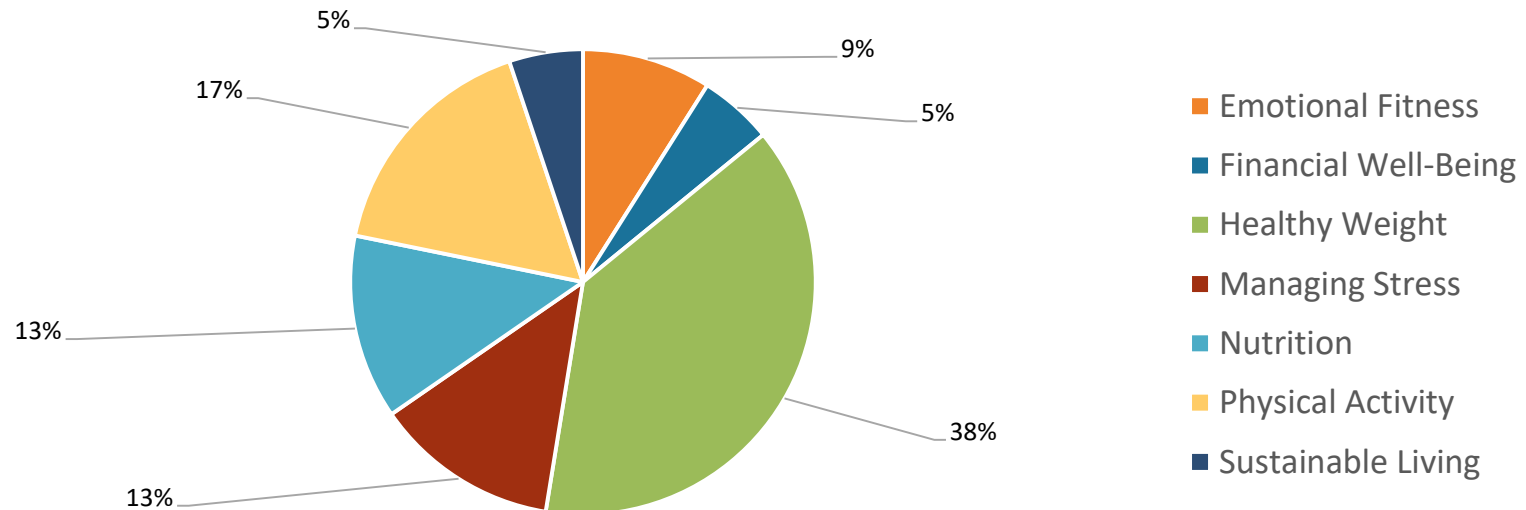
In the last month, how often did you have enough energy to do the things you enjoy?



How many steps do you need a day to feel your best?



Future Challenge Topics



Check out **HES Challenges at a Glance** for your next challenge ideas!

What participants liked most:

"The app and the recipes. I also love adding leaves to my tree. The visual is very motivating!"

"All of it!"

"I never really paid much attention to how much movement I made during the day and this experience made me a little more conscious or aware that I could do more and it was rejuvenating to see progress or to see how many steps I could get in a day."

"Variety of activities and realistic goals."

"It was fun working in teams, we motivated each other everyday."

"Sharing with coworkers and the community."

"It made walking fun, the challenge aspect really got everyone involved."

"Held me accountable!"



Success Story:

"I participated in *Walktober* and several PACE challenges last year, and they really helped me focus on my health. Thanks to these challenges, I lost a significant amount of weight and developed a habit of daily movement. Walktober, in particular, made me excited to get outside every day and stay active. This year, I joined the challenge again, even though I was seven months pregnant! I couldn't get as many steps in as I did last year, but it was incredibly motivating to keep moving every day. I loved knowing that my body is still capable of staying active, and I credit the motivation and mindset I developed last year for making that possible. This challenge has become a powerful reminder to prioritize movement, no matter what stage of life I'm in!" *Hosanna Wendt*

"Lost 5 pounds." *David Hruby*

"My story began in June when I set a challenge for myself to walk 3 miles every day for one year so that would equal 1095 miles. This was because I struggled with some mental health stuff and weight, but once I began my journey of walking every single day on day 95. I realize that this challenge wasn't about weight loss. It was more about finding freedom in my struggle. Today marks day 137 since I started walking I've hit over 400 miles. I've lost 10 pounds and no longer flagged for being pre-diabetic." *Stacey Palmer*



**NEW Wellness
Program Launching
January 2025!**



Exciting News Regarding the 2025 PACE Wellness Program!

PACE is pleased to announce that the 2025 Wellness Program is getting an upgrade! Beginning in January, the Wellness Program will move to **a new vendor – Personify Health**. The Personify Health wellness program can help you achieve your health goals with a fun and engaging experience that delivers powerful resources right to your fingertips. And, you will be able to invite up to 10 friends and family members to join you in the program!

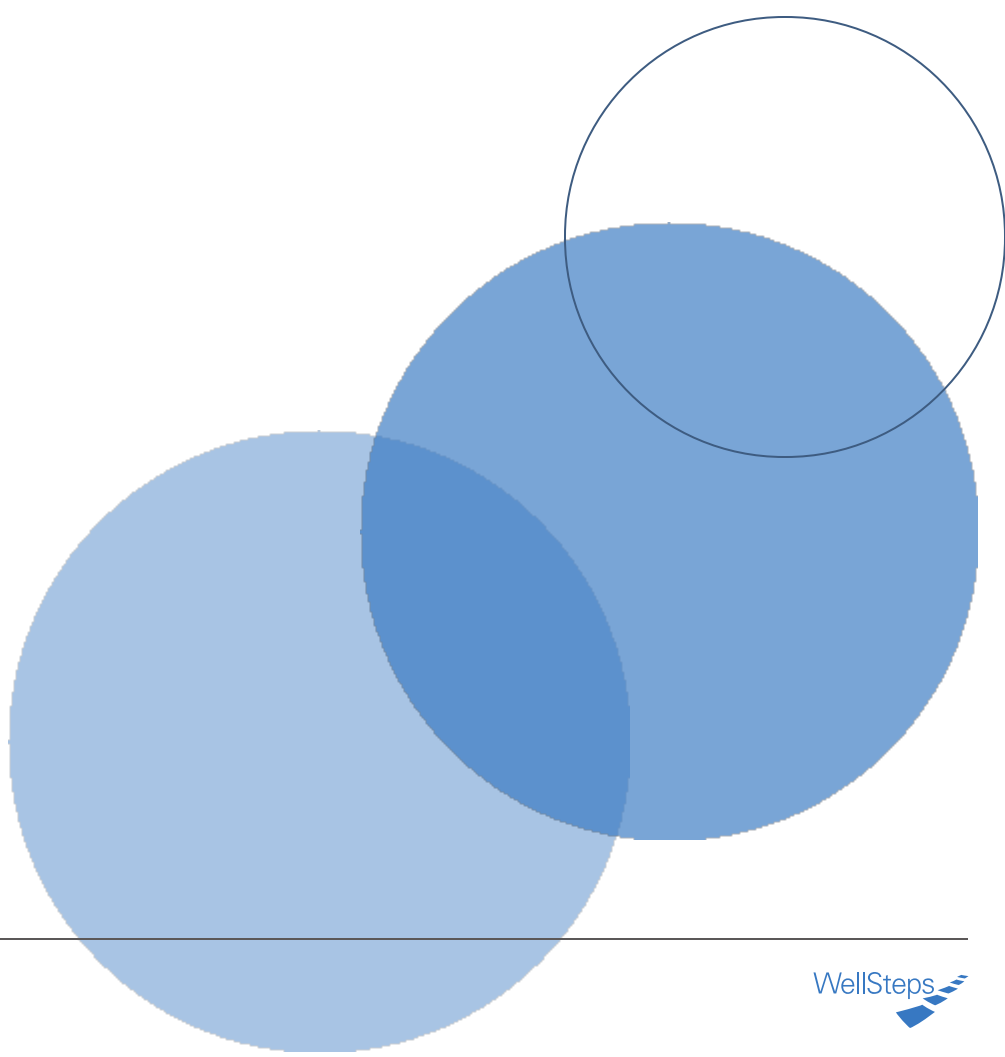
WATCH FOR MORE DETAILS COMING SOON!

We will be sending more information on the new Personify Health program soon, including portal log-in instructions and the requirements for earning 2025 wellness rewards.

Who's eligible: All employees and early retirees enrolled in PACE medical plans are eligible to participate in the Personify Health wellness program and can invite up to 10 friends and family to join them, but only employees and early retirees are eligible to earn \$50 quarterly rewards, \$200 annually.

2024 ANNUAL WELLNESS REPORT

PACE



WHAT THIS REPORT CONTAINS

This Annual Wellness Report contains all the corporate wellness data for PACE for the year 2024 through its partnership with WellSteps. The purpose of providing this data is to help your company understand where you’re succeeding and where to improve.

PERSONAL HEALTH ASSESSMENT

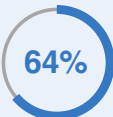
The Personal Health Assessment is completed by employees annually. Participants receive a health grade, actionable tips in a feedback section, and the opportunity to immediately set a behavior change goal.

PARTICIPATION



BEHAVIOR CHANGE CAMPAIGNS

WellSteps campaigns are designed to improve lifestyle behaviors through physical activity, healthy eating, stress management, and more. The table below shows your completed campaigns this year, including those who engaged in the campaign, those who completed the campaign, those who learned at least one thing, and those who changed at least one health behavior during the campaign.

	ENGAGED	COMPLETED	LEARNED	CHANGED
Posture Perfect				
Stress Free				
Intuitive Eating				
AVERAGE				

HIGHLIGHTS

I liked the focus on small and achievable behavior changes that don't take a lot of time and can be achieved while at my desk.

I loved the reminder that random acts of kindness really lift your spirits, makes you feel accomplished and happy.

This campaign helped me looked at food with a different perspective. Having a healthy relationship with food and not guilt myself.

REWARDS PROGRAM

WellSteps Rewards is a wellness activity tracker that allows employees to earn points. The table below shows self-reported employee health outcomes as a result of your rewards program, and overall prize level achievements.

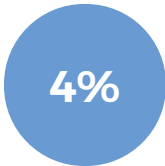
EMPLOYEE OUTCOMES		 REWARDS PROGRAM ACHIEVEMENTS
Improved a health behavior		BRONZE84% of registered users
Improved a health measure		SILVER157% of registered users
Reminded to get a screening		GOLD2511% of registered users
Motivated to achieve a health goal		PLATINUM6026% of registered users
Increased productivity at work		

POSTURE PERFECT



WellSteps campaigns are designed to improve lifestyle behaviors. There are campaigns on several topics including physical activity, healthy eating, stress, and more.

PARTICIPATION

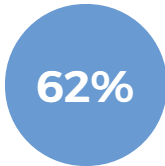


PERCENT
REGISTERED

149
REGISTERED

3,787
ELIGIBLE

ENGAGEMENT

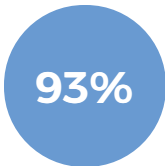


PERCENT
ENGAGED

92
ENGAGED

149
REGISTERED

COMPLETION



PERCENT
COMPLETED

86
COMPLETED

92
ENGAGED

EFFECTIVENESS



PARTICIPANTS
WHO LEARNED
SOMETHING NEW



PARTICIPANTS
WHO CHANGED
ONE BEHAVIOR

HIGHLIGHTS

I liked the focus on small and achievable behavior changes that don't take a lot of time and can be achieved while at my desk.

The campaign shows it doesn't take a lot of time to correct posture. It just takes knowledge and attention while it becomes a habit.

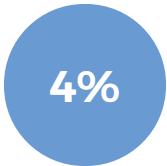
A proper sleeping posture helped me have less back pain, and the tips for sitting posture and taking "micro-breaks" helps to avoid stiffness between repetitive tasks

STRESS FREE



WellSteps campaigns are designed to improve lifestyle behaviors. There are campaigns on several topics including physical activity, healthy eating, stress, and more.

PARTICIPATION



PERCENT
REGISTERED

170
REGISTERED

3,787
ELIGIBLE

ENGAGEMENT

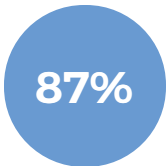


PERCENT
ENGAGED

104
ENGAGED

170
REGISTERED

COMPLETION



PERCENT
COMPLETED

90
COMPLETED

104
ENGAGED

EFFECTIVENESS



PARTICIPANTS
WHO LEARNED
SOMETHING NEW



PARTICIPANTS
WHO CHANGED
ONE BEHAVIOR

HIGHLIGHTS

I loved the reminder that random acts of kindness really lift your spirits, makes you feel accomplished and happy.

The campaign reminded me to think of myself, at times we get wrapped into life and it's easy to forget oneself.

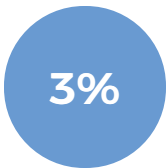
I really like to focus on what's important what would make my life easier. I really did like the sticky notes section one.

INTUITIVE EATING



WellSteps campaigns are designed to improve lifestyle behaviors. There are campaigns on several topics including physical activity, healthy eating, stress, and more.

PARTICIPATION



PERCENT
REGISTERED

120
REGISTERED

3,787
ELIGIBLE

ENGAGEMENT



PERCENT
ENGAGED

82
ENGAGED

120
REGISTERED

COMPLETION



PERCENT
COMPLETED

74
COMPLETED

82
ENGAGED

EFFECTIVENESS



PARTICIPANTS
WHO LEARNED
SOMETHING NEW



PARTICIPANTS
WHO CHANGED
ONE BEHAVIOR

HIGHLIGHTS

This campaign helped me look at food with a different perspective. Having a healthy relationship with food and not guilt myself.

Easy to follow, great tips and helpful reminders of a healthy relationship with food.

The entire campaign helped me think of ways to help my body feel stronger and healthier.

REWARDS REPORT

PACE

REWARDS PROGRAM



WellSteps Rewards is a wellness activity tracker that allows employees to earn points. This page shows a detailed participation summary, including self-reported employee evaluation of your rewards program and overall prize level achievements.

PARTICIPATION



PERCENT
REGISTERED
OUT OF # ELIGIBLE



PERCENT
ENGAGED
OUT OF # REGISTERED

ACHIEVEMENTS

BRONZE 8 4% of registered users

SILVER 15 7% of registered users

GOLD 25 11% of registered users

PLATINUM 60 26% of registered users

LOGIN FREQUENCY	At least once monthly 79%	Once every 2 months 5%	Once every 3 months 3%	Very infrequently 5%	Never 0%
EMPLOYEE OUTCOMES	Improved a health behavior 55%	Improved a health measure 29%	Reminded to get screening 33%	Motivated to achieve a goal 61%	Increased productivity 34%
EASE OF USE	Very easy 56%	Somewhat easy 33%	Not very easy 3%		
FUTURE ACTIVITIES REQUESTED	Exercise 60%	Nutrition 52%	Stress management 50%	Community involvement 20%	Financial 24%

**Data displayed in the table are based on WellSteps aggregate data*

HIGHLIGHTS

WellSteps has changed my life. I am eating better, exercising more, and I've never felt better!

The program re-instilled my confidence to keep taking care of myself physically and mentally, and not give up. Thank you!

Being involved in the wellness program has helped motivate to live a healthier life. Thank you WellSteps!

CHALLENGES REPORT

PACE

300 TOTAL NUMBER OF
COMPLETED CHALLENGES

81 UNIQUE USERS

NUMBER OF TIMES EACH CHALLENGE WAS USED

TOP CHALLENGES



Daily 30

44



Go For H2O

42



Breakfast Boost

26



Eat Your Vegetables

25



Sweet Dreams

23



Take Care of You

22



Washing Works

21



Stress Down

20



1,000 Reps

18



Bring It On

17



Get Organized

16



Financial Wellness

13



Step It Up

7



Maintain Don't Gain

6

INDIVIDUAL HEALTH EFFORTS

PACE

MY TRACKER TOTALS



2,565
WEEKS TRACKED
ACROSS ENTIRE COMPANY

134
DEVICES SYNCED
WITH MY TRACKER

111

number of
EXERCISE
trackers set

exercise done
across entire company:
90,504,074 STEPS
81,802 MINUTES
260 MILES

32

number of
EATING
trackers set

number of servings eaten
across entire company:
23 FRUITS
0 VEGETABLES
0 WHOLE GRAINS

18

number of
“MY OWN THING”
trackers set

number of personal goals set
across entire company:
0 HOURS
99 MINUTES
0 POUNDS

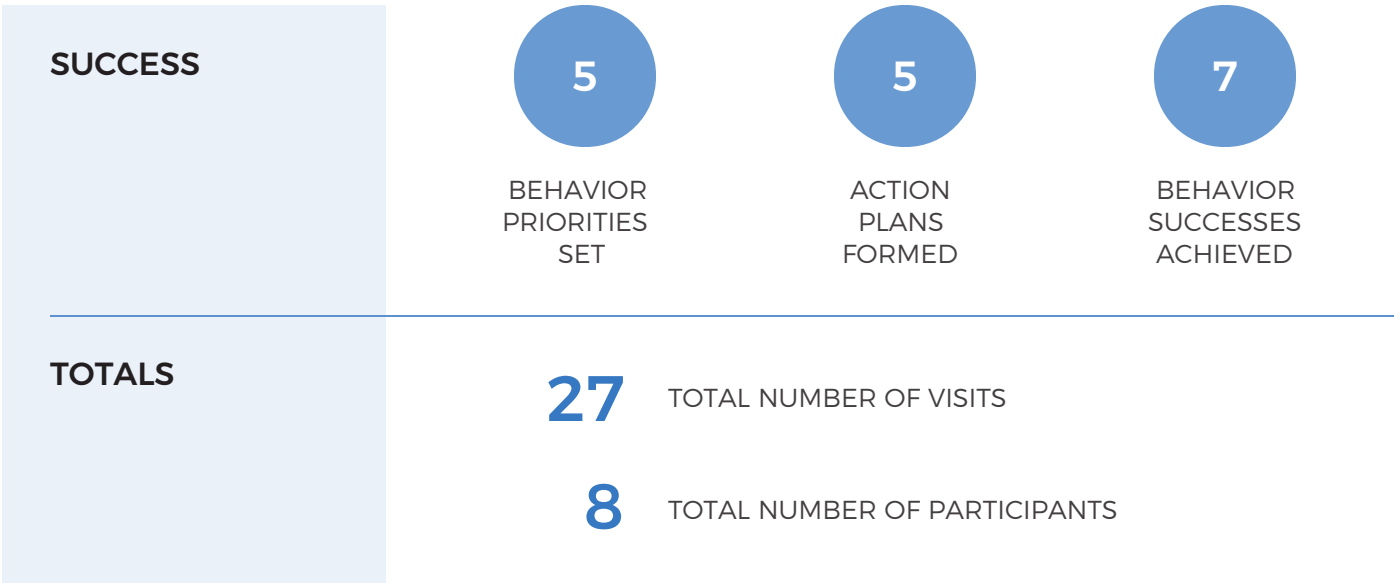
GRAND TOTAL
NUMBER OF TRACKERS SET

161

MY STORY

0 number of stories
submitted

WellSteps integrative health coaching, goal setting, and motivational interviewing methodologies help individuals adopt and sustain healthy lifestyle behaviors. The results show significant improvements in one or more behaviors, such as nutrition, physical activity, weight management, tobacco cessation, stress management and more.



**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
PACE New Member Activity

ITEM #: 2024-025

Enclosure: No

Category: Administration

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

New agencies can join PACE any time during the year.

STATUS:

PACE Management will update the Board on the current marketing activity and any potential PACE JPA member agencies.

RECOMMENDATIONS:

For review, discussion and action as necessary.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Election of President and Secretary/ Treasurer for the January
1, 2025 – December 31, 2026 term

ITEM #: 2024-026
Enclosure: No

Category: Administration

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Elections are held for the PACE President and Secretary/Treasurer in even numbered years.
Elections are held for the PACE Vice President and two Non-Officer Executive Committee
Members in odd numbered years.

STATUS:

The Board will discuss and elect a President and Secretary Treasurer Executive Committee Member
positions for the January 1, 2025 – December 31, 2026, term.

RECOMMENDATIONS:

For review, discussion, and action as necessary.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Board of Directors

DATE: December 12, 2024

SUBJECT:
Election of one non-officer executive committee member
to complete the January 1, 2024 – December 31, 2025,
term

ITEM #: 2024-027

Enclosure: Yes

Category: Administration

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Elections are held for the PACE President and Secretary/Treasurer in even numbered years.
Elections are held for the PACE Vice President and two Non-Officer Executive Committee
Members in odd numbered years.

STATUS:

The Board will discuss and elect a Non-Officer Executive Committee Member position for the
January 1, 2024 – December 31, 2025, term.

RECOMMENDATIONS:

For review, discussion, and action as necessary.

Brent Jones, City of Desert Hot Springs

The City of Desert Hot Springs joined PACE in 2017. The City of Desert Hot Springs is a city in Riverside County and within the Coachella Valley region. The City has experienced rapid growth over the last several decades and that growth is only continuing. The City is responsible for providing development, health, business, transportation, recreation and public safety services via the City of Desert Hot Springs Police Department, to name a few, for the City of Desert Hot Springs. Brent Jones joined the human resources team at the City of Desert Hot Springs in July 2022 as an analyst. Since that time, Brent has been the direct liaison for the administration of the City's employee benefits and serves as a PACE Board Member for the City of Desert Hot Springs. Brent's professional experience includes roles as an experienced director, manager, analyst, and generalist in the field of human resources in both the public and private sector and nonprofit mental health field both in and out of the State of California. Brent's professional experience is supported by a master's degree in human resource management and personnel administration from Lindenwood University and a bachelor's degree in project management from ITT. Brent's breadth of experience in public, private and non-profit arenas is useful in bringing varied perspective and input to the table when it comes to the overall management and administration of employee benefits. Brent's energy, willingness to seize opportunity and most importantly diversify and evolve his expertise in benefits is what makes him both invested and interested in serving in the role as a PACE non-officer executive committee member.