amplifying the materials presented. However, respondents are cautioned that the City is not required to request clarification; therefore, all proposals should be complete and reflect the most favorable terms available from the broker.

VII. Final Selection

Following review of all qualified proposals, selection of a suitable Consultant, and preliminary contract negotiations, a recommendation will be made to the City Commission. Following approval, the City will complete contract negotiations. The selected Consultant should be prepared to commence working on the employee benefit package immediately following contract execution.

Note: The City of Danville reserves the right to accept the response that is determined to be in the best interest of the City and its employees. The City reserves the right to reject any and or all proposals.

PROPOSED RESOURCES

Lead Consultant: Mark Morgan

Project Team (list below)

Lisa Stamm - Primary Contact

Robin Curry - Self-Funding Division Expert

Mike Williams - Fully Insured Rep. for the Client

Joe Jones - Customer Service Director

RESOURCE SPECIALTY

Additional Information about Lead Consultant and Project Team (or include Attachments):

Please see Attachment 5 for additional information about Lead Consultant and Project Team

ACKNOWLEDGEMENTS

X We acknowledge that we take no exceptions to the specifications.

OR

_____ We acknowledge that we do take exceptions to the RFP requirements and specifications and an itemized list of exceptions is attached.

X We acknowledge that service will commence within City's required time frame.

COMPANY NAME: SHERRILL MORGAN

SIGNATURE: Mark T My

PRINTED NAME: Mark T. Morgan

TITLE: President DATE: 02-06-2020

# ADDITIONAL STAFF INFORMATION

The City of Danville will be working directly with their dedicated team on administrative issues, questions, and problem solving. The designated principal for the City will be Mark Morgan.

**PROPOSED TEAM**
**FOR THE CITY OF DANVILLE**



Mark Morgan,
President

*Designated Principal*

Office Location:
Covington, KY

Mark Morgan
markm@sherrillmorgan.com
Responsibilities:
Mark Morgan would be the company principal assigned to work with the City. SHERRILL MORGAN is unique in that our clients have direct access to the management of the company.

Qualifications:
In his 30 years at SHERRILL MORGAN, Mark has accumulated a wealth of experience in establishing and managing employee benefit plans. As the founder of SHERRILL MORGAN's group health division, he paved the way in developing a systematic approach to healthcare benefits for governmental clients. Understanding that an innovative approach is necessary to stay ahead in the healthcare industry, Mark has helped SHERRILL MORGAN to develop its partial self-funding division which allows employers (especially government agencies) to have a measure of control over their healthcare costs. Mark is a leading proponent for transparency in healthcare costs and is regularly invited to speak at human resources conventions on health benefits and healthcare reform.



Lisa Stamm, Esq.,
VP, Consulting Services

*Primary Contact*

Office Location:
Covington, KY

Lisa Stamm, Esq.
lisa@sherrillmorgan.com
Responsibilities:
Lisa Stamm is the VP of the consulting division. She and her team oversee all self-funded groups. She will also be the City's primary contact for regulation, compliance, and health care reform issues and questions. She has an outstanding track record in reducing and maintaining plan costs. Her vast experience makes her invaluable to our clients. She and her team are available on a daily basis.

Qualifications:
Lisa is a graduate of Northern Kentucky University and the University of Cincinnati College of Law. She has been with SHERRILL MORGAN since 2005, and manages health and welfare benefit plans, particularly in the self-funded arena. As a licensed attorney, she can consult clients regarding applicable state and federal laws regarding health plans. She is also available to answer questions regarding compliance with applicable laws, including federal health care reform, COBRA, ERISA, and HIPAA. Lisa is also an expert and featured speaker on regulatory issues, particularly as they relate to health care reform. She has been a member of the Kentucky Bar Association since 1992.



Robin Curry
robin@sherrillmorgan.com
Responsibilities:
Robin Curry will serve the City as a resource for self-funding and to help the City develop significant savings through alternate funding methods.

Qualifications:
Robin Curry works in the self-funded division with Lisa Stamm and has been at SHERRILL MORGAN for eight years. Having worked for Boone County Fiscal Court for over seventeen years, Robin has an

Robin Curry,
Self-Funding
Division Expert

Office Location:
Covington, KY

expert understanding of the unique requirements of government employers including procurement regulations, RFP processes, and non-ERISA plans. Robin is also available to meet with clients, present to boards and committees, and present any pertinent information at employee meetings. Robin is a US Army veteran and is an active member of the community. He has also served as a commissioner on the Boone/Florence Water Commission for over a decade. Robin holds a bachelor's degree from Thomas More College.



Mike Williams,
C.E.O., Licensed
Consultant

*Fully Insured Rep. for the Client*

Office Location:
Covington, KY

Mike Williams
mike@sherrillmorgan.com
Responsibilities:
Mike will oversee your fully insured lines of coverage. Mike has fifteen years' worth of experience at SHERRILL MORGAN and over two decades worth in the industry. He will work closely with your account management team.

Qualifications:
Mike joined SHERRILL MORGAN in 1998. A graduate of the University of Cincinnati, he has a diverse background in the health insurance industry as a marketing representative and service specialist. Mike also has experience as a billing representative, enrollment specialist, and as a divisional trainer and has held positions with Humana and United Healthcare. He has extensive health insurance knowledge of claims issues, state laws and guidelines, and customer service. Mike is responsible for preparing client renewals and new business quotes and is a primary consultant for SHERRILL MORGAN concerning any client service issues. Mike is a Consultant and licensed Agent. Mike has also served on several insurance company advisory boards and on state advisory panels, including the Insurance Coverage Affordability and Relief program in Kentucky.



Joe Jones,
Customer Service
Director

Office Location:
Covington, KY

Joe Jones
joe@sherrillmorgan.com
Responsibilities:
Joe and his customer service team are available to City administration and City employees. Joe heads the customer service team as our Customer Service Director. He is available to work through the enrollment process with the City's HR team. He can also assist in new hire enrollment. As the Customer Service Director, he can also assist in resolving claims issues with the City's selected carrier. His team is available on a daily basis.

Qualifications:
Joe joined SHERRILL MORGAN in 2012 and works as the liaison between carriers and providers and the employees. If there is a problem, Joe will find a solution. He works hard to ensure that all employees know about enrollment, how their plan works, and how any changes affect them. Joe takes some of the burden away from the employer by acting as the middle man.