



SUMMARY REPORT

Agenda Date: 5/12/2026

To: Board of Supervisors

Department or Agency Name(s): Human Resources Department

Staff Name and Phone Number: Janell Crane, 707-565-2885; Cheryl Thibault - Benefits Manager, 707-565-3033

Vote Requirement: Majority

Supervisory District(s): Countywide

Title:

Employee and Retiree Benefits Agreements

Recommended Action:

- A) Authorize the County Executive or designee to execute an agreement with Vision Service Plan (VSP) to provide fully insured vision coverage for County employees and their eligible dependents for a five-year term, from June 1, 2026, through May 31, 2031 at an estimated amount of \$3,693,000.
- B) Authorize the County Executive or designee to execute an agreement with CareCounsel, LLC to provide patient advocacy for County employees, retirees, and their eligible dependents for a five-year term, from August 1, 2026, through July 31, 2031 at an estimated amount of \$702,000.

Executive Summary:

The Human Resources Department (HR) Benefits Unit is responsible for management and administration of the County's health and welfare benefit programs provided to employees, retirees, and eligible dependents. The HR Benefits Unit contracts with fully insured providers and third-party administrators who provide services, specialized skills, and expertise to public and private employers nationally.

In August and September 2025, the Department released two separate Requests for Proposals (RFP) for (1) fully-insured vision coverage and (2) patient advocacy services. These RFPs were widely distributed, and each received several competitive proposals. For each of the RFPs, a diverse proposal evaluation panel was organized. The panel consisted of employee benefits professionals, representatives of Sonoma County

retirees, and labor organizations who rated the proposals and interviewed finalists to determine the most qualified and cost-effective vendors.

Discussion:

The Human Resources Department issued separate, widely circulated, Requests for Proposals (RFP) for two benefit programs: Vision and Patient Advocacy in August 2025 and September 2025. Each proposal was evaluated by a subcommittee of the Joint Labor Management Benefits Committee (JLMBC) with the assistance of the County's benefit consultant, Segal Consulting. Following an analysis of the data provided in the RFP proposals, finalist interviews were conducted, and for each program the Joint Labor Management Benefits Committee ultimately selected vendors based on the reasons described below and forwarded the recommendations to the Director of Human Resources for approval.

Vision

A total of three proposals were received for fully insured vision coverage which included VSP, MetLife, and EyeMed. VSP presented the most favorable response to meet the County's requirements and expectations, including enhanced benefits and a reduction to the current costs of services. Currently, the annual cost for VSP is approximately \$768,000. Under the proposed agreement, the County will realize a 4.0% premium rate reduction for a projected annual savings of \$30,720. The new rate is guaranteed for five years. Additionally, the agreement includes performance standards that, if not met, will result in a 1% maximum refund of premium to the County. The enhanced benefits include a full retail frame allowance of up to \$150 at Costco, Walmart and Sam's, reduced copays on polycarbonate lenses, and increased savings on lens enhancements. The contract will also include a \$25,000 communication credit over the 60-month contract term. The recommended action authorizes the County Executive or designee to execute the agreement with VSP from June 1, 2026, through May 31, 2031, for an estimated amount of \$3,693,000.

Patient Advocacy

A total of five proposals were received for patient advocacy services which included CareCounsel LLC, Quantum Health, Included Health, Transcarent, and Health Advocate Solutions. CareCounsel presented the most favorable response to meet the County's requirements and expectations. It utilizes a team of professionals, consisting of employees who hold academic degrees and/or are licensed Registered Nurses, and who have specialized knowledge and extensive experience in resolving health care issues for employees,

retirees, and their dependents. Services include assistance with comparing health plan options and understanding managed care benefits, resolving claims and billing disputes, physician selection, troubleshooting plan eligibility disputes, addressing quality of care concerns, supporting participants with doctor/patient communications issues, and providing health care education and related resources. Many of these issues are beyond the expertise and training of County staff. More importantly, the cases usually involve sensitive health information, to which, as an employer, we should not be privy. CareCounsel maintains a database of all issues they address and alerts the County when concerns arise in the areas of health plan coverage inconsistencies, regional network accessibility, systemic eligibility errors, and persistent claims adjudication problems. This information is used to address critical service deficiencies directly with vendors.

CareCounsel has been a strong partner with the County and is very active in coordinating benefit information during critical times, including Annual Enrollment and when implementing new benefit programs. Additionally, retirees consistently utilize CareCounsel, which for many is a trusted source for help and assistance beyond Human Resources staff.

The recommended action authorizes the County Executive or designee to execute the agreement with CareCounsel LLC from August 1, 2026, through July 31, 2031, for an estimated amount of \$702,000, which is a 2.7% increase from the previous contract. Additionally, the agreement includes performance standards that, if not met, will result in a 20% maximum refund of premium to the County.

There is no change to the level of benefits provided to employees, as negotiated and previously authorized by the Board and outlined in all memorandums of understanding with the employee organizations and the Salary Resolution.

Strategic Plan:

N/A

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

Prior Board Actions:

June 8, 1999: Board authorized new agreement with VSP Plan.

July 19, 2016 (item 11): Board authorized agreement with CareCounsel.

May 25, 2021 (item 9; [File Number 2021-0442](#)): Board authorized new agreement with VSP and renewal agreement with CareCounsel.

FISCAL SUMMARY

Expenditures	FY25-26 Adopted	FY26-27 Projected	FY27-28 Projected
Budgeted Expenses	\$61,400	\$865,500	\$877,200
Additional Appropriation Requested			
Total Expenditures	\$61,400	\$865,500	\$877,200
Funding Sources			
General Fund/WA GF		\$331,560	\$331,560
State/Federal		\$287,352	\$427,752
Fees/Other	\$61,400	\$246,588	\$117,888
Use of Fund Balance			
General Fund Contingencies			
Total Sources	\$61,400	\$865,500	\$877,200

Narrative Explanation of Fiscal Impacts:

Premium costs associated with the VSP agreement are funded by employer and employee contributions through payroll which are estimated to be \$3,693,000 in total during the term of the agreement, of which \$3,686,000 is estimated to be contributed by the employer and \$7,000 is estimated to be contributed by employees. The employer portion of contributions are appropriated in each department’s Fiscal Year (FY) 2025/26 salaries and benefits budget and will be included in the recommended FY 2026/27 and future fiscal year budgets. Values under the proposed agreements do not differ significantly from existing programmed rates.

Patient advocacy costs associated with the CareCounsel agreement are primarily funded through the OPEB and Benefits Administration rate charged to County departments and agencies. Sufficient appropriations are included in the FY 2025/26 budget and the proposed FY 2026/27 recommended budget.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)
N/A			

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Narrative Explanation of Staffing Impacts (If Required):

N/A

Attachments:

1. Service Agreement with Vision Service Plan - Employees
2. Service Agreement with Vision Service Plan - Retirees Savings Pass
3. Service Agreement with CareCounsel LLC

Related Items "On File" with the Clerk of the Board:

N/A