

**AUGUST 16, 2023 CITY COUNCIL BUDGET BRIEFING AGENDA
CERTIFICATION**

This certification is given pursuant to Chapter XI, Section 9 of the City Charter for the City Council Briefing Agenda dated August 16, 2023. We hereby certify, as to those contracts, agreements, or other obligations on this Agenda authorized by the City Council for which expenditures of money by the City are required, that all of the money required for those contracts, agreements, and other obligations is in the City treasury to the credit of the fund or funds from which the money is to be drawn, as required and permitted by the City Charter, and that the money is not appropriated for any other purpose.



T. C. Broadnax
City Manager

08/11/2023

Date



Jack Ireland
Chief Financial Officer

08/11/2023

Date

RECEIVED

2023 AUG 11 PM 7:25

**CITY SECRETARY
DALLAS, TEXAS**

City of Dallas

*1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201*

Public Notice

230702

POSTED CITY SECRETARY
DALLAS, TX



COUNCIL BRIEFING AGENDA

REVISED

August 16, 2023

9:00 AM

BUDGET WORKSHOP

(For General Information and Rules of Courtesy, Please See Opposite Side.)

(La Información General Y Reglas De Cortesía Que Deben Observarse

Durante Las Asambleas Del Consejo Municipal Aparecen En El Lado Opuesto, Favor De Leerlas.)

General Information

The Dallas City Council regularly meets on Wednesdays beginning at 9:00 a.m. in the Council Chambers, 6th floor, City Hall, 1500 Marilla. Council agenda meetings are broadcast live on bit.ly/cityofdallastv and on Time Warner City Cable Channel 16. Briefing meetings are held the first and third Wednesdays of each month. Council agenda (voting) meetings are held on the second and fourth Wednesdays. Anyone wishing to speak at a meeting should sign up with the City Secretary's Office by calling (214) 670-3738 by 5:00 p.m. of the last regular business day preceding the meeting. Citizens can find out the name of their representative and their voting district by calling the City Secretary's Office.

Sign interpreters are available upon request with a 48-hour advance notice by calling (214) 670-5208 V/TDD. The City of Dallas is committed to compliance with the Americans with Disabilities Act. **The Council agenda is available in alternative formats upon request.**

If you have any questions about this agenda or comments or complaints about city services, call 311.

Rules of Courtesy

City Council meetings bring together citizens of many varied interests and ideas. To insure fairness and orderly meetings, the Council has adopted rules of courtesy which apply to all members of the Council, administrative staff, news media, citizens and visitors. These procedures provide:

- That no one shall delay or interrupt the proceedings, or refuse to obey the orders of the presiding officer.
- All persons should refrain from private conversation, eating, drinking and smoking while in the Council Chamber.
- Posters or placards must remain outside the Council Chamber.
- No cellular phones or audible beepers allowed in Council Chamber while City Council is in session.

"Citizens and other visitors attending City Council meetings shall observe the same rules of propriety, decorum and good conduct applicable to members of the City Council. Any person making personal, impertinent, profane or slanderous remarks or who becomes boisterous while addressing the City Council or while

Información General

El Ayuntamiento de la Ciudad de Dallas se reúne regularmente los miércoles en la Cámara del Ayuntamiento en el sexto piso de la Alcaldía, 1500 Marilla, a las 9 de la mañana. Las reuniones informativas se llevan a cabo el primer y tercer miércoles del mes. Estas audiencias se transmiten en vivo por la bit.ly/cityofdallastv y por cablevisión en la estación *Time Warner City Cable* Canal 16. El Ayuntamiento Municipal se reúne en el segundo y cuarto miércoles del mes para tratar asuntos presentados de manera oficial en la agenda para su aprobación. Toda persona que desee hablar durante la asamblea del Ayuntamiento, debe inscribirse llamando a la Secretaría Municipal al teléfono (214) 670-3738, antes de las 5:00 pm del último día hábil anterior a la reunión. Para enterarse del nombre de su representante en el Ayuntamiento Municipal y el distrito donde usted puede votar, favor de llamar a la Secretaría Municipal.

Intérpretes para personas con impedimentos auditivos están disponibles si lo solicita con 48 horas de anticipación llamando al (214) 670-5208 (aparato auditivo V/TDD). La Ciudad de Dallas se esfuerza por cumplir con el decreto que protege a las personas con impedimentos, *Americans with Disabilities Act*. **La agenda del Ayuntamiento está disponible en formatos alternos si lo solicita.**

Si tiene preguntas sobre esta agenda, o si desea hacer comentarios o presentar quejas con respecto a servicios de la Ciudad, llame al 311.

Reglas de Cortesía

Las asambleas del Ayuntamiento Municipal reúnen a ciudadanos de diversos intereses e ideologías. Para asegurar la imparcialidad y el orden durante las asambleas, el Ayuntamiento ha adoptado ciertas reglas de cortesía que aplican a todos los miembros del Ayuntamiento, al personal administrativo, personal de los medios de comunicación, a los ciudadanos, y a visitantes. Estos reglamentos establecen lo siguiente:

- Ninguna persona retrasará o interrumpirá los procedimientos, o se negará a obedecer las órdenes del oficial que preside la asamblea.
- Todas las personas deben abstenerse de entablar conversaciones, comer, beber y fumar dentro de la cámara del Ayuntamiento.
- Anuncios y pancartas deben permanecer fuera de la cámara del Ayuntamiento.
- No se permite usar teléfonos celulares o enlaces electrónicos (*paggers*) audibles en la cámara del Ayuntamiento durante audiencias del Ayuntamiento Municipal.

"Los ciudadanos y visitantes presentes durante las asambleas del Ayuntamiento Municipal deben de

attending the City Council meeting shall be removed from the room if the sergeant-at-arms is so directed by the presiding officer, and the person shall be barred from further audience before the City Council during that session of the City Council. If the presiding officer fails to act, any member of the City Council may move to require enforcement of the rules, and the affirmative vote of a majority of the City Council shall require the presiding officer to act." Section 3.3(c) of the City Council Rules of Procedure.

obedecer las mismas reglas de comportamiento, decoro y buena conducta que se aplican a los miembros del Ayuntamiento Municipal. Cualquier persona que haga comentarios impertinentes, utilice vocabulario obsceno o difamatorio, o que al dirigirse al Ayuntamiento lo haga en forma escandalosa, o si causa disturbio durante la asamblea del Ayuntamiento Municipal, será expulsada de la cámara si el oficial que este presidiendo la asamblea así lo ordena. Además, se le prohibirá continuar participando en la audiencia ante el Ayuntamiento Municipal. Si el oficial que preside la asamblea no toma acción, cualquier otro miembro del Ayuntamiento Municipal puede tomar medidas para hacer cumplir las reglas establecidas, y el voto afirmativo de la mayoría del Ayuntamiento Municipal precisara al oficial que este presidiendo la sesión a tomar acción." Según la sección 3.3 (c) de las reglas de procedimientos del Ayuntamiento.

Handgun Prohibition Notice for Meetings of Governmental Entities

"Pursuant to Section 30.06, Penal Code (trespass by license holder with a concealed handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not enter this property with a concealed handgun."

"De acuerdo con la sección 30.06 del código penal (ingreso sin autorización de un titular de una licencia con una pistol oculta), una persona con licencia según el subcapítulo h, capítulo 411, código del gobierno (ley sobre licencias para portar pistolas), no puede ingresar a esta propiedad con una pistola oculta."

"Pursuant to Section 30.07, Penal Code (trespass by license holder with an openly carried handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not enter this property with a handgun that is carried openly."

"De acuerdo con la sección 30.07 del código penal (ingreso sin autorización de un titular de una licencia con una pistola a la vista), una persona con licencia según el subcapítulo h, capítulo 411, código del gobierno (ley sobre licencias para portar pistolas), no puede ingresar a esta propiedad con una pistola a la vista."

"Pursuant to Section 46.03, Penal Code (places weapons prohibited), a person may not carry a firearm or other weapon into any open meeting on this property."

"De conformidad con la Sección 46.03, Código Penal (coloca armas prohibidas), una persona no puede llevar un arma de fuego u otra arma a ninguna reunión abierta en esta propiedad."

The City Council Briefing meeting will be held by videoconference and in the Council Chambers, 6th Floor at City Hall. Individuals who wish to speak in accordance with the City Council Rules of Procedure must sign up with the City Secretary's Office.

The public is encouraged to attend the meeting virtually; however, City Hall is available for those wishing to attend the meeting in person following all current pandemic-related public health protocols.

The following videoconference link is available to the public to listen to the meeting and Public Affairs and Outreach will also stream the City Council Briefing on Spectrum Cable Channel 16 and bit.ly/cityofdallastv:

<https://dallascityhall.webex.com/dallascityhall/j.php?MTID=m0b7bc8649a7bfb742f9e4bcd479c5d0d>

Invocation and Pledge of Allegiance

Special Presentations

Open Microphone Speakers

VOTING AGENDA

1. [23-1758](#) Approval of Minutes of the June 19, 2023 Special Called City Council Meetings and the June 21, 2023 City Council Meeting
2. [23-1759](#) Consideration of appointments to boards and commissions and the evaluation and duties of board and commission members (List of nominees is available in the City Secretary's Office)

BRIEFINGS

- A. [23-1839](#) FY 2023-24 Budget Workshop: Timeline and Discussion
Attachments: [Presentation](#)
- B. [23-1840](#) FY 2023-24 Budget Workshop: Employee Health Benefits Overview
Attachments: [Presentation](#)
- C. [23-2057](#) FY 2023-24 Budget Workshop: General Obligation Debt Overview and Financial Capacity
Attachments: [Presentation](#)

D. [23-2079](#) 2024 Bond Update

Attachments: [Presentation](#)

Adjournment

The above schedule represents an estimate of the order for the indicated briefings and is subject to change at any time. Current agenda information may be obtained by calling (214) 670-3100 during working hours.

Note: An expression of preference or a preliminary vote may be taken by the Council on any of the briefing items.

EXECUTIVE SESSION NOTICE

A closed executive session may be held if the discussion of any of the above agenda items concerns one of the following:

1. seeking the advice of its attorney about pending or contemplated litigation, settlement offers, or any matter in which the duty of the attorney to the City Council under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the Texas Open Meetings Act. [Tex. Govt. Code §551.071]
2. deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the city in negotiations with a third person. [Tex. Govt. Code §551.072]
3. deliberating a negotiated contract for a prospective gift or donation to the city if deliberation in an open meeting would have a detrimental effect on the position of the city in negotiations with a third person. [Tex. Govt. Code §551.073]
4. deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee unless the officer or employee who is the subject of the deliberation or hearing requests a public hearing. [Tex. Govt. Code §551.074]
5. deliberating the deployment, or specific occasions for implementation, of security personnel or devices. [Tex. Govt. Code §551.076]
6. discussing or deliberating commercial or financial information that the city has received from a business prospect that the city seeks to have locate, stay or expand in or near the city and with which the city is conducting economic development negotiations; or deliberating the offer of a financial or other incentive to a business prospect. [Tex Govt. Code §551.087]
7. deliberating security assessments or deployments relating to information resources technology, network security information, or the deployment or specific occasions for implementations of security personnel, critical infrastructure, or security devices. [Tex Govt. Code §551.089]



City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-1758

Item #: 1.

SUBJECT

Approval of Minutes of the June 19, 2023 Special Called City Council Meetings and the June 21, 2023 City Council Meeting



City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-1759

Item #: 2.

AGENDA DATE: August 16, 2023
COUNCIL DISTRICT(S): N/A
DEPARTMENT: City Secretary's Office

SUBJECT

Consideration of appointments to boards and commissions and the evaluation and duties of board and commission members (List of nominees is available in the City Secretary's Office)



City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-1839

Item #: A.

FY 2023-24 Budget Workshop: Timeline and Discussion

The presentation will be uploaded as soon as it is available.
Please check back for updates.



City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-1840

Item #: B.

FY 2023-24 Budget Workshop: Employee Health Benefits Overview



City of Dallas

FY 2023-24 Budget Workshop: Employee Health Benefits Overview

August 16, 2023

Kimberly Bizer Tolbert,
Deputy City Manager

Nina Arias, SHRM-CP,
Director, Human Resources

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 - 2024 Proposed Post-65 Retiree Plan Design
- 2024 Proposed Rates
- Next Steps and Timeline



Strategic Benefits Overview



STRATEGIC FOCUS

IMPROVE HEALTHCARE
CONSUMERISM

PROMOTE PREVENTIVE
CARE

MANAGE COST LONG-
TERM THROUGH
TARGETED PROGRAMS
AND WELLNESS

GIVE CHOICE AND
OPTIONS FOR
PERSONAL
ACCOUNTABILITY

WELLBEING PILLARS



Strategic Benefits Overview

Key Program Highlights and Outcomes



Wellness/Consumerism

- Over 1,000 employees participated in the Health Expo Event in 2023
- 6,794 participants have completed the wellness activities as of June 2023
- Implementation of retiree advocate solution through Health Advocate 6/1/23
- Introduced mental health resource, Headway for members enrolled in BCBS medical plan
- New Clinical Engine Reporting (CLUE/Artemis)

Preventative Care/Choice and Personal Responsibility

- Increased participation in wellness incentive by over 250% to 7,847 EEs in 2022 and 6,794 participants have completed the wellness activities as of June 2023
- Facilitated Wellness Screening Kit to Pre-65 Retirees
- Sponsored Onsite Bexa Breast Screenings
- Outstanding Year 2 Member Rewards Engagement - 7,250 households activated Member Rewards; 3,013 households shopped Member Rewards

Cost Control

- Implemented Mark Cuban Cost Plus Pharmacy Solution
- Enhanced Advanced Payment Review (APR)* Projected Savings \$1.2 million
- Negotiated Stop Loss Renewal Savings \$250,000
- Medicare Advantage Negotiation \$1.4 million
- Negotiated Long Term Disability Rate Reduction. Estimated savings \$500,000
- Created Custom Monthly Financial Summary



Strategic Benefits Overview

Key Family Care Support Initiatives



Qualified Midwife Services

Added to Blue Cross Blue Shield Medical Plan Effective October 1, 2023

Available to members enrolled in one of the City's BCBSTX medical plans with a normal pregnancy

(Does not apply to members with complex pregnancies)

Qualified midwife services will mirror coverage for traditional pregnancy & delivery care

Headway Mental Health Benefit

Presently Available through Blue Cross Blue Shield Medical Plan

Available to members enrolled in one of the City's BCBSTX medical plans

Provides an additional concierge service to connect members with a licensed therapist or psychiatrist to support their mental health journey

Includes personalized services to ensure members are getting matched with a provider for their specific clinical needs & personal preferences

Health Advocate

2023 Retiree Concierge and Advocacy Partner

Provide retirees with a dedicated solution to help navigate benefit plan resources, the importance of wellness maintenance, and alternative retiree benefits

- Provides information to retirees on City specific benefits as well as independent coverage options
- Staffed call center with licensed Medicare advocates – Parts A, B, D, Supp & Advantage
- Support whole family (retiree, spouse, parents, dependents)
- Wellness engagement & support
- Resources library



Strategic Benefits Overview

Additional Benefits to Employees



Implemented PNC
Bank partnership

Offered Legal services
and Pet Insurance

Retiree Focused Programs:

- Health Advocate concierge
- Wellness Incentive and Home biometric kits

Enhanced Airrosti
options for joint and
muscle pain

Activated Navigate
Platform for wellbeing

Implemented
Employee discounts
program

Other Benefits Focused on Balance and Flexibility:

- City Council approved paid parental leave
- City Council approved mental health leave
- City Council approved childcare subsidy
- Attendance Incentive Leave (AIL)
- Compassionate Leave
- Quarantine Leave





City of Dallas

Focus on Equity & 2024 Benefits Plans

Equity in Benefits



Tiered Premium Pricing*

UNDER \$44,000

- Premium Copay: \$34.00
- Primary Care Plan: \$16.00

\$44,000 - \$66,000

- Premium Copay: \$39.50
- Primary Care Plan: \$21.00

\$66,001+

- Premium Copay: \$44.50
- Primary Care Plan: \$26.50

Targeted programs for conditions that affect minorities and lower earning employees disproportionately

- Kannact (Diabetes and Heart Care)
- Mental Health Resources (Magellan Ascend)
- Men/Women/Transgender Health
- Financial Wellness Education and Resources

Enhanced Program Access conditions that affect minorities and lower earning employees disproportionately

- Dependent Child Care Subsidy
- Telehealth
- Catapult virtual wellness assessments
- Blue Cross Blue Shield Access Rewards - Concierge

*Full Time, Employee Only Bi-Monthly Rate



2024 Proposed Active & Pre-65 Plan Design

IRS Required HDHP Deductible Change



Benefits	PCP Plan – Narrow Network/Blue Essentials	Copay Plan – Broad Network/Broad Access	HDHP w/HSA – Broad Network/Broad Access
Annual Deductible	\$1,500*	\$1,500	\$3,200*
Preventive Care Visit	\$0	\$0	\$0
City Hall Clinic Visit	\$0*	\$0	\$25
PCP/CVS Minute Clinic Visit	\$25 Copay*	\$25 Copay	20% after deductible
Specialist Visit	\$50 Copay*	\$50 Copay	20% after deductible
Urgent Care	\$40 Copay*	\$40 Copay	20% after deductible
Emergency Room	\$300 Copay*	\$300 Copay	20% after deductible
Lab & X-ray	\$50 copay*	\$50 copay	20% after deductible
Generic / Preferred Brand / Non-Preferred Brand	Copay \$15 / \$40 / \$75*	Copay \$15 / \$40 / \$75	20% after deductible
COD Funding	N/A	N/A	\$700 to Health Savings Account (HSA) Family- \$1,700

*The proposed plan design for active employees and Pre-65 retirees is the same as in 2023, with exception of the High Deductible (the Annual Deductible is changing from \$3,000 to \$3,200 due to Changes in IRS regulations.)



Post-65 Retiree Plan Design



	High Plan		Low Plan	
	In-Network	Out-of-Network	In-Network	Out-of-Network
Deductible*	\$0		\$0	
OOP Max	\$0		\$1,500	
Combined OOP Max	\$0		\$1,500	
Inpatient Hospital – Acute	\$0 copay per stay		\$250 copay per stay	
Inpatient Mental Health Care	\$0 copay per admission		\$250 copay per admission	
Skilled Nursing Facility	\$0 copay (days 1-20) \$0 copay (days 21-100)		\$0 copay (days 1-20) \$80/day (days 21-100)	
Cardiac Rehab Services	\$0 copay		\$10 copay	
Pulmonary Rehab Services	\$0 copay		\$10 copay	
Emergency Care	\$0 copay		\$120 copay	

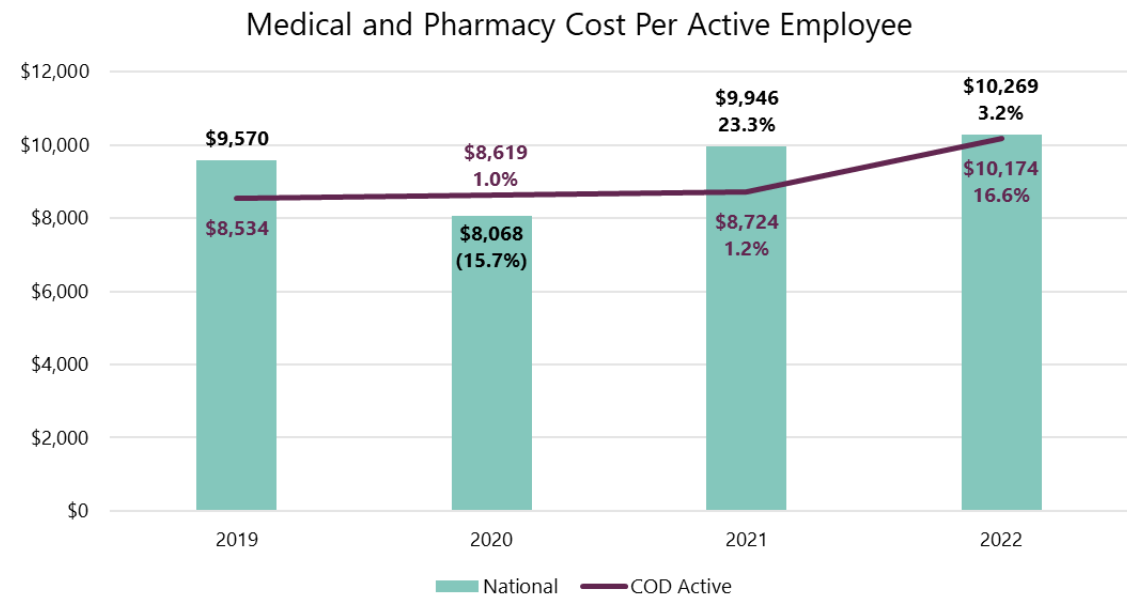
The proposed plan design for Post-65 retirees is the same as in 2023, with exception of the *CMS Required Pharmacy Changes:

- Rx Initial Coverage Limit changes from \$4,660 to \$5,030 - Rx Coverage Gap changes from \$7,400 to \$8,000
- Rx Catastrophic Phase 4 changes from copays to once a member reached \$8,000 they will no longer have a cost share

* The Centers for Medicare & Medicaid Services, CMS, is part of the Department of Health and Human Services (HHS)



Active Employee Cost Compared to National Trend



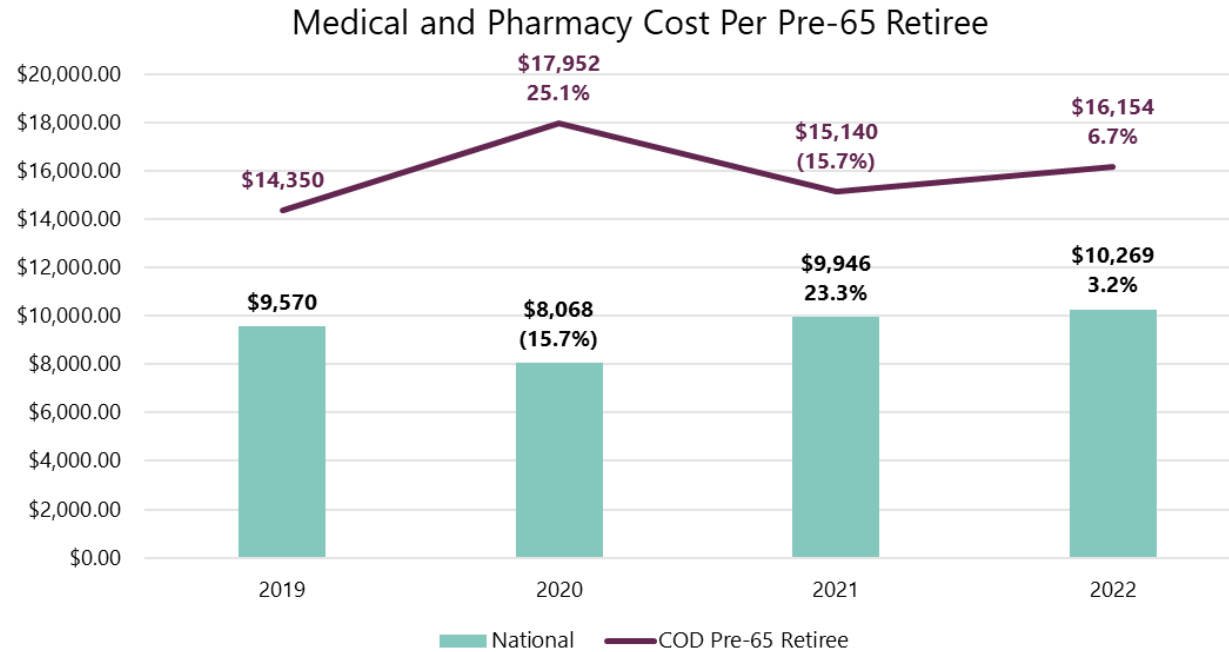
- After decreasing in 2020, the national healthcare cost came roaring back in 2021. Healthcare costs will continue to grow in 2023 and 2024.
- The City of Dallas' active healthcare costs have traditionally been lower than national trend. The exception was in 2020 when national healthcare costs decreased due to the pandemic.

Source: Milliman Medical Index – Cost per average person was adjusted to match the City of Dallas ratio of members to employees covered under the medical plan.

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260



Pre-65 Retirees Cost Compared to National Trend



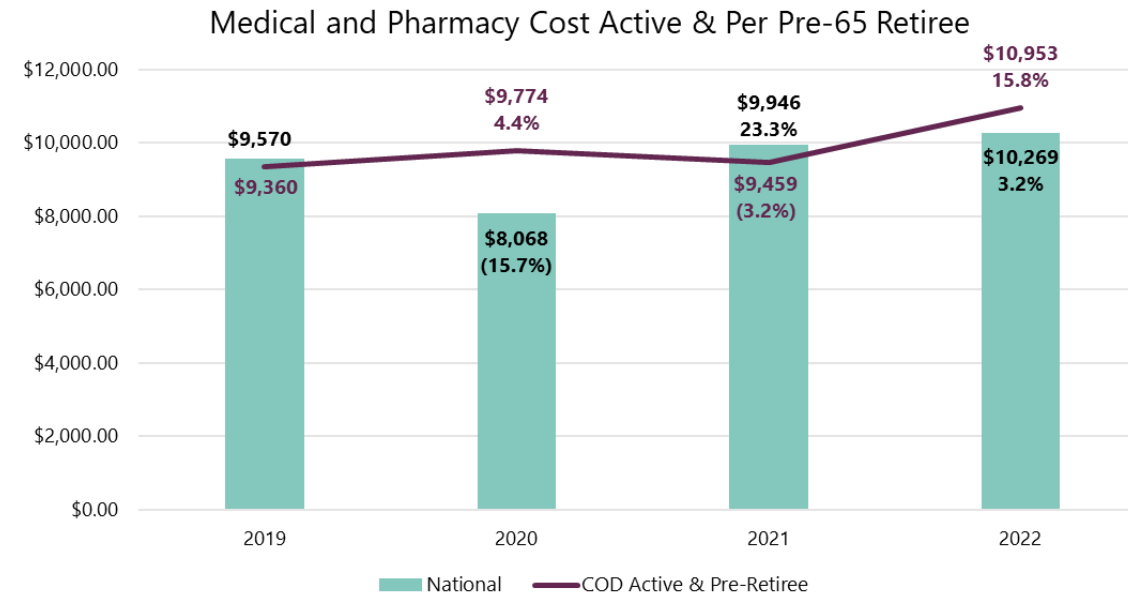
- Compared to the national average, Pre-65 retirees are ~70% more expensive over the past 4-years.
- The COVID pandemic impacted the Retiree population more than Actives in 2020, resulting in a decrease in total cost in 2021.

Source: Milliman Medical Index – Cost per average person was adjusted to match the City of Dallas ratio of members to employees covered under the medical plan

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260 (Claims cost only).



Active & Pre-65 Retirees Compared to National Trend



- The City of Dallas did not have a decrease in 2020 compared to national trend and the increase in healthcare spend was realized in 2022 instead of 2021.
- When comparing the active and pre-65 retiree's healthcare trend to national trend, the City of Dallas' spend has stayed relatively consistent, but experienced higher costs in 2022 compared to national trend.

Source: Milliman Medical Index – Cost per average person was adjusted to match the City of Dallas ratio of members to employees covered under the medical plan

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260



Financial Impact – Current and Future Impact



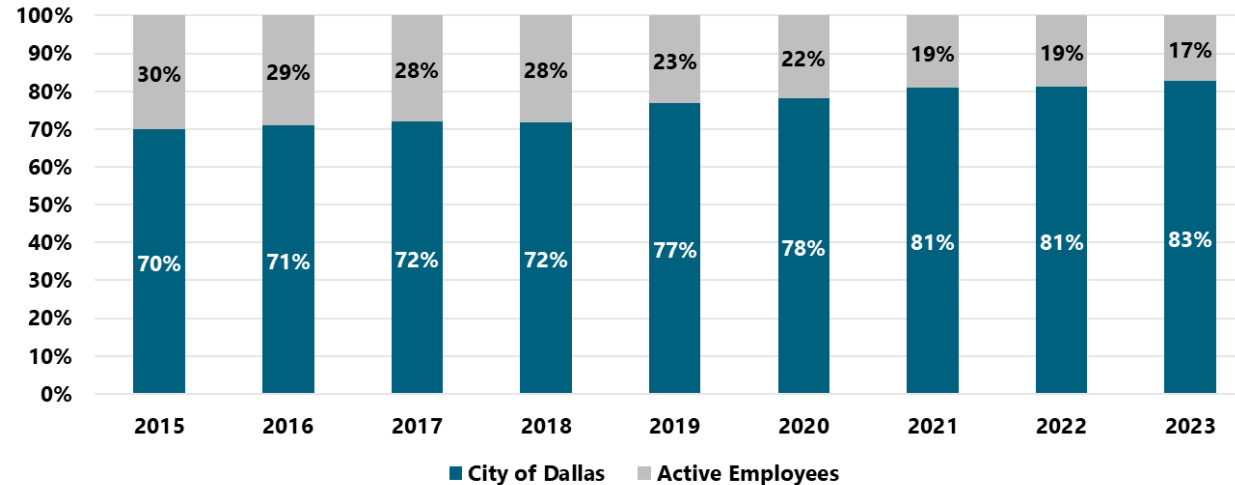
STATEMENT OF REVENUES AND EXPENDITURES

Employee Benefits

	FY 2020-21 Actual	FY 2021-22 Actual	FY 2022-23 Adopted	FY 2022-23 Amended	FY 2022-23 Forecast	FY 2023-24 Budget	FY 2024-25 Planned
BEGINNING FUND BALANCE	\$30,819,428	\$31,832,928	\$25,972,362	\$25,972,362	\$12,548,707	\$0	\$1,184,238
REVENUES:							
Employee Contributions	52,943,394	41,903,574	44,675,798	44,675,798	45,149,717	\$46,665,178	47,869,891
Retiree Contributions	26,340,563	25,948,963	26,927,732	26,927,732	24,938,089	\$25,583,019	26,272,734
City Contributions	103,802,414	101,021,548	108,965,789	108,965,789	115,062,347	\$134,878,640	142,579,789
All Remaining Revenues	15,576	314,547	0	0	151,734	\$0	0
TOTAL REVENUES	183,101,947	169,188,633	180,569,319	180,569,319	185,301,887	\$207,126,836	216,722,414
TOTAL RESOURCES AVAILABLE	213,921,375	201,021,560	206,541,681	206,541,681	197,850,594	\$207,126,836	217,906,652
TOTAL EXPENDITURES	173,614,600	182,756,818	189,583,785	189,583,785	197,850,594	\$205,942,598	214,727,409
Changes in Encumbrances and other Balance Sheet Accounts	(8,473,847)	(5,716,035)	0	0	0	0	0
ENDING FUND BALANCE	\$31,832,928	\$12,548,707	\$16,957,896	\$16,957,896	\$0	\$1,184,238	\$3,179,243



Health Premium Cost Share Philosophy



- City of Dallas HR Recommendation: Future contribution philosophy should be based on overall rewards strategy necessary to attract & retain talent at the level required to serve the needs of the City and its residents.
- HR recommended increase to employee contributions in previous years
 - City of Dallas deferred employee contribution increases in the past, and instead, used Fund Balance to absorb costs and avoid premium increases to employees. Action was done to support retention and affordability for our employees.

Industry Survey Benchmark Premium Cost Share

Mercer National Survey Cost-Share:

Employee Only Coverage:

(PPO Plans) 25%/75% Employee/Employer
(HSA Plans) 18%/82% Employee/Employer

Dependent Coverage:

(PPO Plans) 30%/70% Employee/Employer
(HSA Plans) 23%/77% Employee/Employer

HMA Book of Business:

Private/Public Entity Cost-Share

Employee Only Coverage: 25%/75%

Dependent Coverage: 30%/70%

City of Dallas Cost-Share:

Overall 17%/83% Employee/Employer

Employee Only Coverage:

(PCP Plan) 6%/94% Employee/Employer
(Coplay Plan) 11%/89% Employee/Employer
(HSA Plan) 5%/95% Employee/Employer

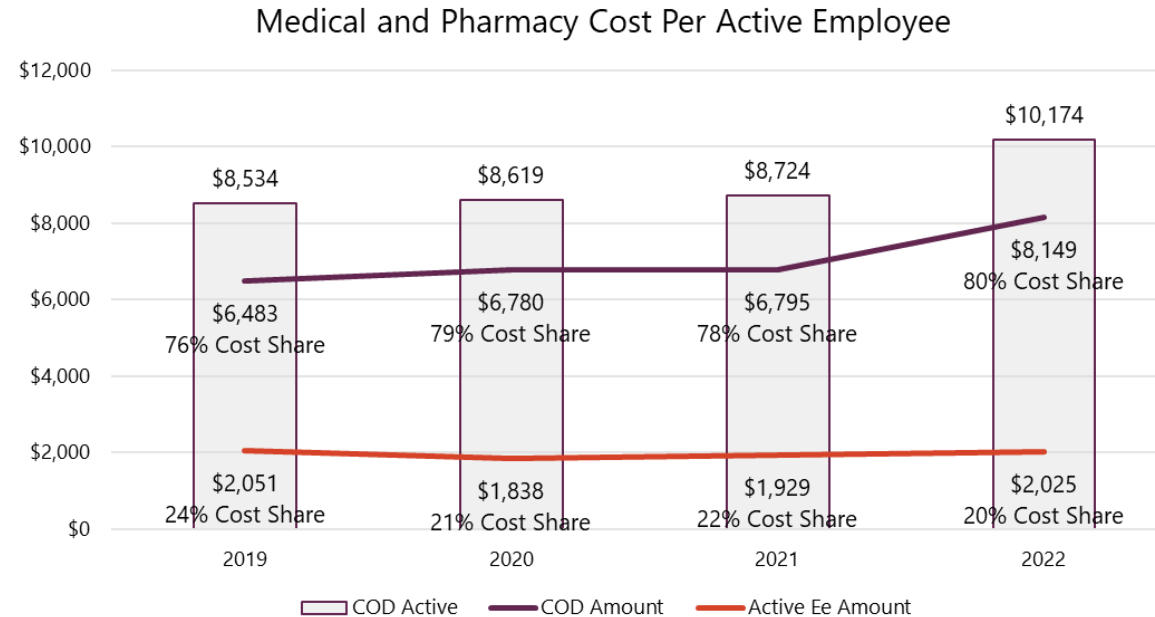
Dependent Coverage:

(PCP Plan) 23%/77% Employee/Employer
(Coplay Plan) 28%/72% Employee/Employer
(HSA Plan) 23%/77% Employee/Employer

City premium cross shares average across salary tiers



Active Employee Healthcare Cost Share (2019-2022)

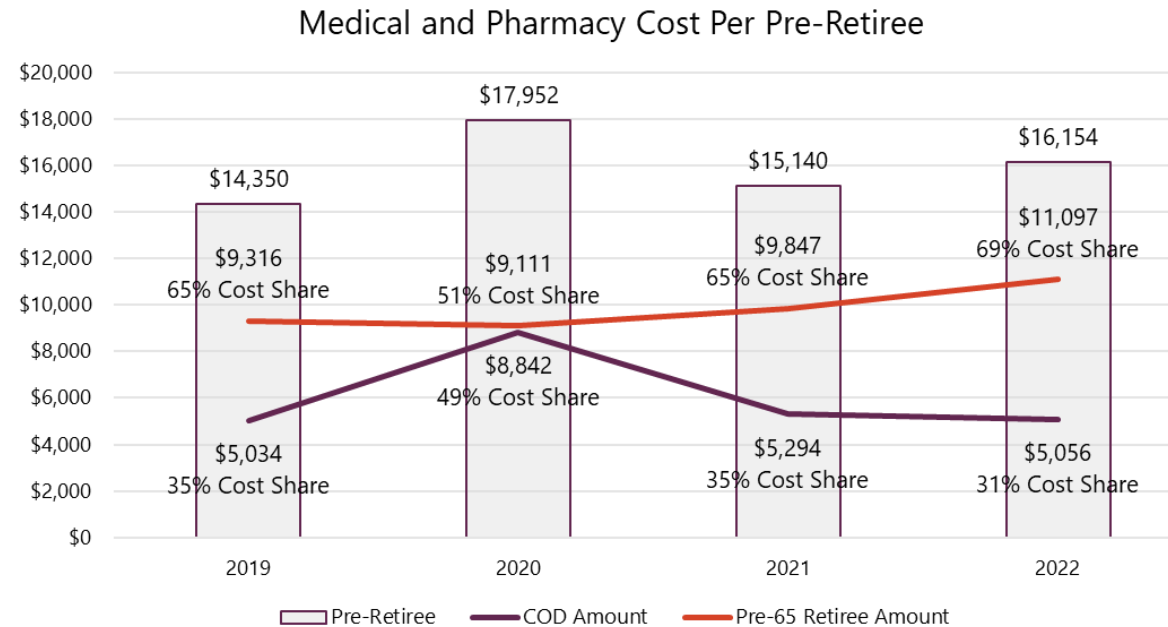


- As healthcare costs continue to increase, the City of Dallas is paying a greater percent of the cost and absorbing the healthcare cost increases.
- Active employee's cost have remained relatively constant, while the City's costs have continued to increase.

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260. The Active amount reflects changes in contributions and plan migration.



Pre-65 Retiree Healthcare Cost Share

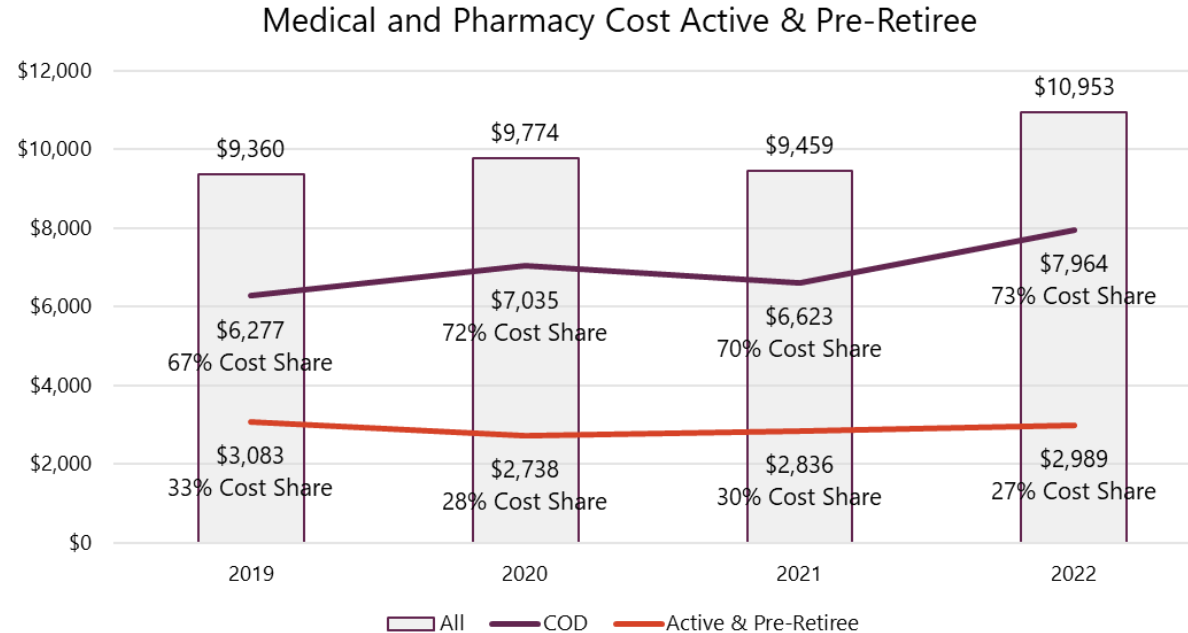


- The City of Dallas paid a higher portion of cost during the pandemic, but Pre-65 Retirees pay a higher portion of costs per the Retiree rules for cost-share requirements (e.g., Pre-2011 50% of cost and Post-2011 100% of cost)

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260. The Retiree amount reflects changes in contributions and plan migration.



Active & Pre-65 Retirees Healthcare Cost Share



- Overall, the City of Dallas pays a higher portion of cost, and the subsidy has grown over the past 4-years.
- The City of Dallas has continued to absorb the healthcare cost increases year over year

Data does not include ASO Fees, Stop-Loss, and other program costs in fund 260. The Retiree amount reflects changes in contributions and plan migration.





City of Dallas

2024 Proposed Rates and Impact Analysis

Proposed Rates: Active Employee PCP Plan - 5% Increase



PCP < \$44k	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	321	\$30	\$32	\$33	\$35	\$36	\$38
Employee + Spouse	8	\$418	\$439	\$461	\$484	\$508	\$533
Employee + Child(ren)	45	\$131	\$138	\$144	\$152	\$159	\$167
Employee + Family	8	\$458	\$481	\$505	\$530	\$557	\$585

PCP Middle	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	381	\$40	\$42	\$44	\$46	\$49	\$51
Employee + Spouse	20	\$443	\$465	\$488	\$513	\$538	\$565
Employee + Child(ren)	135	\$151	\$159	\$166	\$175	\$184	\$193
Employee + Family	30	\$488	\$512	\$538	\$565	\$593	\$623

PCP > \$66k	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	413	\$50	\$53	\$55	\$58	\$61	\$64
Employee + Spouse	31	\$468	\$491	\$516	\$542	\$569	\$597
Employee + Child(ren)	200	\$171	\$180	\$189	\$198	\$208	\$218
Employee + Family	113	\$518	\$544	\$571	\$600	\$630	\$661

2023 Total Enrollment By Plan

PCP Plan – 1,711
 Copay Plan – 5,901
 HSA Plan – 3,718

All rates shown as monthly rates



Proposed Rates: Active Employee Copay Plan - 5% Increase



Copay < \$44k	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	680	\$65	\$68	\$72	\$75	\$79	\$83
Employee + Spouse	33	\$488	\$512	\$538	\$565	\$593	\$623
Employee + Child(ren)	116	\$201	\$211	\$222	\$233	\$244	\$257
Employee + Family	36	\$548	\$575	\$604	\$634	\$666	\$699

Copay Middle	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	1,160	\$75	\$79	\$83	\$87	\$91	\$96
Employee + Spouse	97	\$513	\$539	\$566	\$594	\$624	\$655
Employee + Child(ren)	308	\$221	\$232	\$244	\$256	\$269	\$282
Employee + Family	130	\$578	\$607	\$637	\$669	\$703	\$738

Copay > \$66k	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	1,664	\$85	\$89	\$94	\$98	\$103	\$108
Employee + Spouse	217	\$538	\$565	\$593	\$623	\$654	\$687
Employee + Child(ren)	761	\$241	\$253	\$266	\$279	\$293	\$308
Employee + Family	682	\$608	\$638	\$670	\$704	\$739	\$776

2023 Total Enrollment By Plan

PCP Plan – 1,711
Copay Plan – 5,901
HSA Plan – 3,718

All rates shown as monthly rates



Proposed Rates: Active Employee HSA Plan - 5% Increase



HSA Plan	Enrollment	2023 Plan Year	2024 Plan Year	2025 Plan Year	2026 Plan Year	2027 Plan Year	2028 Plan Year
Employee Only	2,040	\$30	\$32	\$33	\$35	\$36	\$38
Employee + Spouse	175	\$418	\$439	\$461	\$484	\$508	\$533
Employee + Child(ren)	1,036	\$131	\$138	\$144	\$152	\$159	\$167
Employee + Family	457	\$458	\$481	\$505	\$530	\$557	\$585

2023 Total Enrollment By Plan

PCP Plan – 1,711
 Copay Plan – 5,901
 HSA Plan – 3,718

All rates shown as monthly rates



Proposed Rates: Active Employee Impact - 5% Increase



Scenario One: Average Police Officer

Current average annual salary
\$74,224

Current annual benefit premium
(Blue Choice Copay – High Tier)

Employee Only: \$1,020
Employee and Family: \$7,296

Annual Salary Increase (not including step increases)
5% of \$74,224 = \$3,711 – New Average Salary: \$77,935

Annual Benefit Premium Increase
Employee Only: 5% of \$ 1,020 = \$51 annual increase
New Rate= \$1,071

Employee and Family: 5% of \$ 7,296 = \$364.80 annual increase
New Rate: \$7,300.80

Insurance Type	Salary Increase	Benefit Premium Increase	Net Impact (Increase)
Employee Only	\$3,711	-\$45.00	\$3,666.00
Employee + Family	\$3,711	-\$364.80	\$3,346.20



Proposed Rates: Active Employee Impact - 5% Increase



Scenario Two: Average Civilian Employee

Current average annual salary
\$59,096

Current annual benefit premium
(Blue Choice Copay Middle Tier)

Employee Only: \$900
Employee and Family: \$6,936

Annual Average Salary Increase

3% of \$59,096 = \$1,773 – New Average Salary: \$60,869

Annual Benefit Premium Increase

Employee Only: 5% of \$900 = \$45 annual increase
New Rate= \$945

Employee and Family: 5% of \$ 6,936 = \$346.80 annual increase
New Rate: \$7,282.80

Insurance Type	Salary Increase	Benefit Premium Increase	Net Impact - Increase
Employee Only	\$1,773	-\$45.00	\$1,728.00
Employee + Family	\$1,773	-\$346.80	\$1,426.20



Proposed Pre 65 Retiree Rates



Retiree Only
Retiree/Spouse
Retiree/Child
Retiree/Family
Spouse Only
Spouse/Child Only

Hired 2010 and Later								
2023			2024			% Increase		
PCP Plan	Copay Plan	HSA Plan	PCP Plan	Copay Plan	HSA Plan	PCP Plan	Copay Plan	HSA Plan
\$1,373.89	\$1,329.67	\$1,285.19	\$1,424.02	\$1,378.19	\$1,332.75	3.6%	3.6%	3.7%
\$2,747.77	\$2,659.33	\$2,570.38	\$2,848.04	\$2,756.37	\$2,665.49	3.6%	3.6%	3.7%
\$2,060.83	\$1,994.50	\$1,927.78	\$2,136.03	\$2,067.28	\$1,999.12	3.6%	3.6%	3.7%
\$3,434.72	\$3,324.17	\$3,212.97	\$3,560.05	\$3,445.47	\$3,331.86	3.6%	3.6%	3.7%
\$1,373.89	\$1,329.67	\$1,285.19	\$1,424.02	\$1,378.19	\$1,332.75	3.6%	3.6%	3.7%
\$2,060.83	\$1,994.50	\$1,927.78	\$2,136.03	\$2,067.28	\$1,999.12	3.6%	3.6%	3.7%

Retiree Only
Retiree/Spouse
Retiree/Child
Retiree/Family
Spouse Only
Spouse/Child Only

Hired Before 2010								
2023			2024			% Increase		
PCP Plan	Copay Plan	HSA Plan	PCP Plan	Copay Plan	HSA Plan	PCP Plan	Copay Plan	HSA Plan
\$686.94	\$664.83	\$642.59	\$712.01	\$689.09	\$666.37	3.6%	3.6%	3.7%
\$2,060.83	\$1,994.50	\$1,927.78	\$2,136.03	\$2,067.28	\$1,999.12	3.6%	3.6%	3.7%
\$1,373.89	\$1,329.67	\$1,285.19	\$1,424.02	\$1,378.19	\$1,332.75	3.6%	3.6%	3.7%
\$2,747.77	\$2,659.33	\$2,570.38	\$2,848.04	\$2,756.37	\$2,665.49	3.6%	3.6%	3.7%
\$824.33	\$797.80	\$771.11	\$996.82	\$964.73	\$932.92	20.9%	20.9%	21.0%
\$1,511.28	\$1,462.63	\$1,413.71	\$1,708.83	\$1,653.82	\$1,599.29	13.1%	13.1%	13.1%

- Retiree rates based retiree only (stand-alone) basis as required by GASB.
- Rates have been submitted to Deloitte for approval



Retiree Subsidy Summary



	% Subsidies					
	2023			2024		
	PCP Plan	Copay Plan	HSA Plan	PCP Plan	Copay Plan	HSA Plan
Retiree Only	50%	50%	50%	50%	50%	50%
Spouse Portion	100%	100%	100%	100%	100%	100%
Child Portion	100%	100%	100%	100%	100%	100%
Spouse + Child Portion	100%	100%	100%	100%	100%	100%
Spouse (Sp Portion)	60%	60%	60%	70%	70%	70%
Spouse/Child (Ch Portion)	100%	100%	100%	100%	100%	100%



Post 65 Retiree Rates – No Changes



Post-65

2023 Retiree Portion

	High Plan	Low Plan
Retiree Only	\$328.70	\$266.50
Retiree + Spouse	\$657.40	\$533.00
Spouse Only	\$328.70	\$266.50

2024 Retiree Portion

	High Plan	Low Plan
Retiree Only	\$328.70	\$266.50
Retiree + Spouse	\$657.40	\$533.00
Spouse Only	\$328.70	\$266.50

Post-65

2023 Employer Portion

	High Plan	Low Plan
Retiree Only	\$0.00	\$0.00
Retiree + Spouse	\$0.00	\$0.00
Spouse Only	\$0.00	\$0.00

2024 Employer Portion

	High Plan	Low Plan
Retiree Only	\$0.00	\$0.00
Retiree + Spouse	\$0.00	\$0.00
Spouse Only	\$0.00	\$0.00

	% Subsidies	
	High Plan	Low Plan
Retiree Only	0%	0%
Retiree + Spouse	0%	0%
Spouse Only	0%	0%

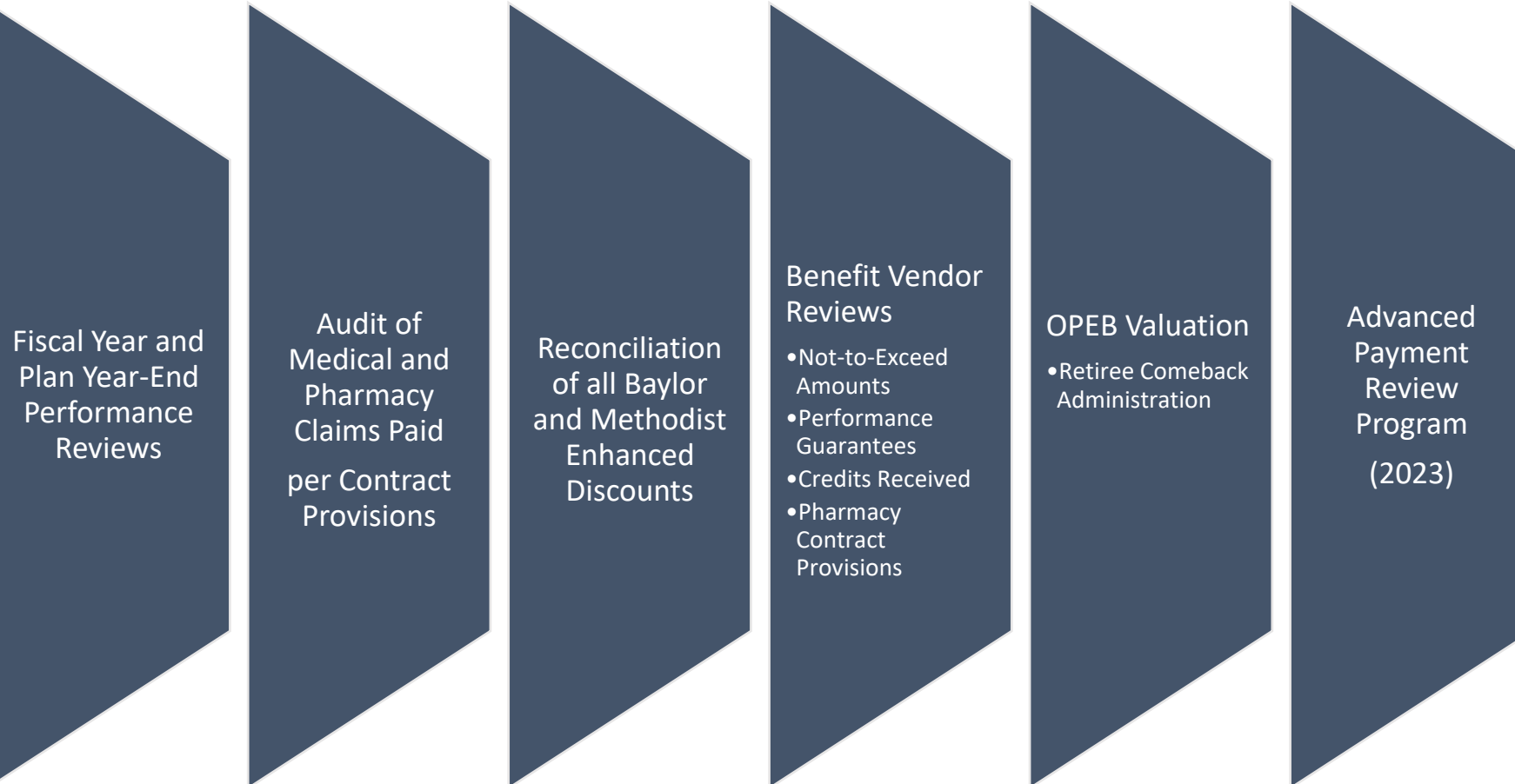
	% Subsidies	
	High Plan	Low Plan
Retiree Only	0%	0%
Retiree + Spouse	0%	0%
Spouse Only	0%	0%



Ongoing Fund Financial Control Activities



The following activities are performed on an ongoing basis to manage and maintain control of the City's self-funded benefits and wellness funds 260, 265, 26A:



Timeline and Next Steps





City of Dallas

2023 Appendix

Wellbeing/Family Support Programs Utilization



Wellness Incentive

2022 - 7,847 employees earned
2021 - 3,107 employees earned
(250% increase)

(Wellness employee completion)

Mammogram/Bexa On Site Screenings

13 - Bexa Screenings
19 - Mammograms

EAP Utilization

2023 YTD - 1,253 accessed digital tools
2022 – 333 accessed digital tools
(376% increase)

(Mental Health/Family Support)

Kannact Utilization

2023 YTD – 73% of participants are
engaged with their coach
2022 – 56% of participants are
engaged with their coach
(Diabetes & Hypertension Program)

Health Advocate Platform

Implemented June 1, 2023
3,339 enrolled
358 interactions

(Retiree Concierge Service)

Wellness Incentive Extended to Pre-65 Retirees

Catapult biometric kits were
mailed to 1,124 pre-65 retiree's
homes to earn the wellness incentive

Navigate Platform

Implemented January 1, 2023
2023 YTD (1/1/23-7/31/23)
5,106 portal logins

(Well-being Portal)

Child Care Subsidy

2023 – 218 enrolled
2022 – 98 enrolled
(224% increase)

(Dependent Care Subsidy)

PNC Bank Participation

2023 YTD – 300 inquiries
154 Accounts Opened
20 Mortgage Inquires

(Financial Wellness)



2023 Year-to-Date (YTD) information includes data from 1/1/2023 through 6/30/2023.

2022-2023 Activities and Pillars



Activities/Programs	Wellness Pillars				
Access to Healthy Food - Foundations Café					
Annual Physical - Tied to Wellness Incentive					
Attendance Incentive Leave (AIL)					
BCBS Blue Rewards – quality provider					
BCBS Blue Rewards – concierge svc					
Childcare Subsidy					
City match of Retirement Plans Promoted (Fidelity)					
City Paid Long-Term Disability Insurance					
Compassionate Leave					
Critical Incident Support Mgmt. (CISM) via EAP					
Diabetes/ Hypertension Program					
EE Support (online, Racial Inequity/Social Justice)					
Employee Assistance Program (EAP)					
Employee Resource Groups					
Financial Counseling/Planning					
Financial Education Series (Fidelity)					
Fitness Classes On-site					
Fitness Newsletter, Microsite (Benefits Website)					
Flexible Work Schedules					
Flu Shots					
Free Reduced Cost Diabetic/HBP Med - Preventative					

Activities/Programs	Wellness Pillars				
Health Education/Literacy					
Health Fairs					
Health Risk Assessment (HRA)					
Holistic/Alternative Care (Airosti)					
IP and BCBS/ virtual					
Men Health Education					
Narrow and broad network options					
On-Site/Near-Site Clinics					
Parental Leave					
Retiree Comeback Option					
Simplified wellness incentive eligibility					
Telemedicine - Enhanced Services					
Tobacco Cessation - Enhanced Services through EAP					
Transgender Health Education					
Tuition Assistance Program					
Virtual Biometric Screening Option - Catapult					
Virtual Walk Events					
Voluntary Benefits, Optional Additional Life Insurance					
Voluntary employee affinity groups					
Weight Management					
Wellness Seminars (Monthly)					
Wellness Challenges					



2024 New Activities and Pillars

HMA Updated



New Activities/Programs 2024	Wellness Pillars				
Wellness Challenges through Navigate					
Navigate Wellness Platform - Increase Engagement					
Health Advocate Retiree Concierge - Increase Engagement					
Monthly Department Wellbeing Education Meetings					
City of Dallas Banking Partnership - PNC					
Headway Mental Health Resource					
Airrosti Remote Recovery					



Edited on 7.25.23

Active Enrollment



2023 Enrollment

Plan Name	EO	ES	EC	EF	Total #	Total %
PCP < \$44k	322	8	45	8	383	3.4%
PCP Middle	382	20	135	30	568	5.0%
PCP > \$66k	415	31	201	113	760	6.7%
Copay < \$44k	682	33	116	36	867	7.7%
Copay Middle	1,163	97	309	130	1,699	15.0%
Copay > \$66k	1,669	218	764	684	3,335	29.4%
HSA Plan	2,046	176	1,039	458	3,718	32.8%
Total:	6,679	583	2,608	1,460	11,330	100.0%

2023 Total Enrollment By Plan

PCP Plan – 1,711

Copay Plan – 5,901

HSA Plan – 3,718



Year-Over-Year Enrollment



Actives	2022	2023	YOY
PCP Plan	Enrollment	Migration	
Ee Only	1,148	1,126	▼ (2%)
Ee + Spouse	65	61	▼ (6%)
Ee + Ch(ren)	400	377	▼ (6%)
Ee + Family	159	149	▼ (7%)
Copay Plan	Enrollment	Migration	
Ee Only	3,287	3,512	▲ 7%
Ee + Spouse	312	347	▲ 11%
Ee + Ch(ren)	1,143	1,191	▲ 4%
Ee + Family	805	848	▲ 5%
H.S.A Plan	Enrollment	Migration	
Ee Only	2,083	2,043	▼ (2%)
Ee + Spouse	187	177	▼ (5%)
Ee + Ch(ren)	1,054	1,031	▼ (2%)
Ee + Family	461	457	▼ (1%)
Total Enrollment	11,104	11,318	▲ 2%

Pre-65 Retirees	2022	2023	YOY
PCP Plan	Enrollment	Migration	
Ee Only	21	16	▼ (23%)
Ee + Spouse	4	3	▼ (29%)
Ee + Ch(ren)	0	0	0.0%
Ee + Family	0	0	-
Copay Plan	Enrollment	Migration	
Ee Only	770	726	▼ (6%)
Ee + Spouse	88	63	▼ (28%)
Ee + Ch(ren)	51	46	▼ (11%)
Ee + Family	23	19	▼ (19%)
H.S.A Plan	Enrollment	Migration	
Ee Only	273	259	▼ (5%)
Ee + Spouse	56	45	▼ (19%)
Ee + Ch(ren)	20	12	▼ (40%)
Ee + Family	13	8	▼ (36%)
Total Enrollment	1,319	1,196	▼ (9%)

12,844 COD Employees (As of 2023)
11,318 COD Employees Enrolled in the 2023 Health Benefits Plan

88% Participation



Strategic Benefits Overview

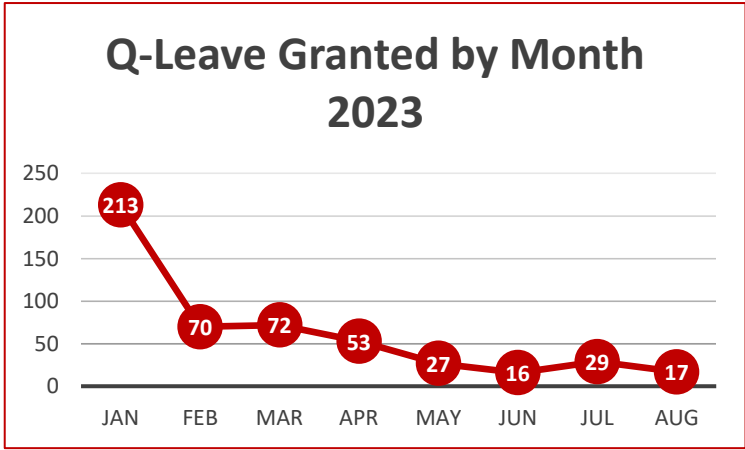
Additional Benefits to Employees



Other Benefits Focused on Balance and Flexibility:

- City Council approved paid parental leave - 213 employees participated in 2023
- City Council approved mental health leave
- City Council approved childcare subsidy - 21/22 (98 enrolled); 22/23 (218 enrolled)
- Attendance Incentive Leave (AIL)
- Compassionate Leave
- Quarantine Leave (Q-Leave)

Compassionate Leave 2022-2023					
Requests		Approved		Approvals by Dept	
Date	Count	Date	Count	Dept	Count
2022	3	2022	2	DWU	2
Jul	1	Aug '22	1	EFM	1
Aug	1	Oct '22	1	Total	3
Sep	1	2023	1		
2023	1	Feb '23	1		
Jan	1	Total	3		
Total	4				
Application by Status		Status	Count		
		Approved	3		
		Pending	1		
		Total	4		



Navigate Wellbeing Solutions

2023 City of Dallas Wellness Platform



Wellness Platform Key Features

- Funded through BCBS Wellness Credits
- Custom private label wellbeing portal that serves as interactive hub for City of Dallas health & wellness program.
- Displays reward completion status of City of Dallas wellness incentive.
- Integrates City of Dallas and third-party resources, benefits information and other sites or documents that are useful to participants.
- Creating custom promotional materials to educate participants about the City of Dallas's Total Wellbeing program and drive member engagement in City of Dallas wellness initiatives.
- Includes employer reporting to streamline wellness incentive completion data.
- Full call center w/ a custom phone & email dedicated to City of Dallas, along with Account manager, account coordinator, and onsite representative.



Activity Completion thru 6/2023	Completed
Total portal registrations since program launch	1,780
Wellness Incentive (Active Employees) (Catapult Home Screening & Annual Physical with Labs)	7,763
Wellness Incentive (Pre-65 Employees) (Catapult Home Screening & Annual Physical with Labs)	1,003
Wellbeing Survey	720
Flu Shot	184
Download Navigate App	236
Group Challenge	84
Video Course	46
Personal Challenge	33
Community Event	18



2023 PNC Bank Financial Services

HMA Updated



Service	Cost
Offer employees access to the bank's financial wellness programs along with banking products and services	Employee Paid

Virtual Wallet

- A Money Bar to visualize your available and planned spending*
- A calendar to plan your finances
- Options for automatic transfer rules
- The ability to track spending categories and set budgets



Educational Workshops and Seminars



Employee Appointments and Referrals

Financial Wellness Clinics



Monthly, quarterly and annual financial reviews



Top Rated Customer Service



Key Features

- Easily accessible financial wellness tools available 24/7 that assist employees with financial literacy
- Develop custom branding for all City of Dallas materials and communications
- Onsite and virtual education and enrollment
- Top rated customer service experience
- One-on-one financial wellness reviews

YTD 2023 Utilization

- PNC WorkPlace Banking team has had 171 member inquiries with 70 accounts opened.
- PNC onsite branch has had 259 member inquiries and 148 accounts opened in 2023



Edited on 7.25.23



City of Dallas

In the Spirit of Excellence!

Utilization Summary

State of Employee Health for City of Dallas



HMA Updated

Cancer

Cancer cost on a Per Patient Per Year (PPPY) has increased 30% compared from 2021.

Cardiovascular

Cardiovascular cost on a Per Patient Per Year (PPPY) has decreased 2% from 2021.

Diabetes

Diabetes cost on a Per Patient Per Year (PPPY) has increased 3% from 2021.

Musculoskeletal

Musculoskeletal (MSK) cost on a Per Patient Per Year (PPPY) has increased 3% from 2021.

Mental Health

Mental Health cost on a Per Patient Per Year (PPPY) has increased 21% from 2021.

Prevalence Indicators

- Delayed services and procedures due to COVID-19.
- Increased identification of risk prompted by employees completing wellness screenings (7k+).
- Increased medical plan enrollment.

2021

Cost PPPY \$6,500
Prevalence 8%

Cost PPPY \$3,100
Prevalence 24%

Cost PPPY \$3,200
Prevalence 7%

Cost PPPY \$2,700
Prevalence 26%

Cost PPPY \$1,100
Prevalence 12%

2022

Cost PPPY \$8,500
Prevalence 9%

Cost PPPY \$3,000
Prevalence 23%

Cost PPPY \$3,300
Prevalence 8%

Cost PPPY \$2,800
Prevalence 27%

Cost PPPY \$1,400
Prevalence 14%

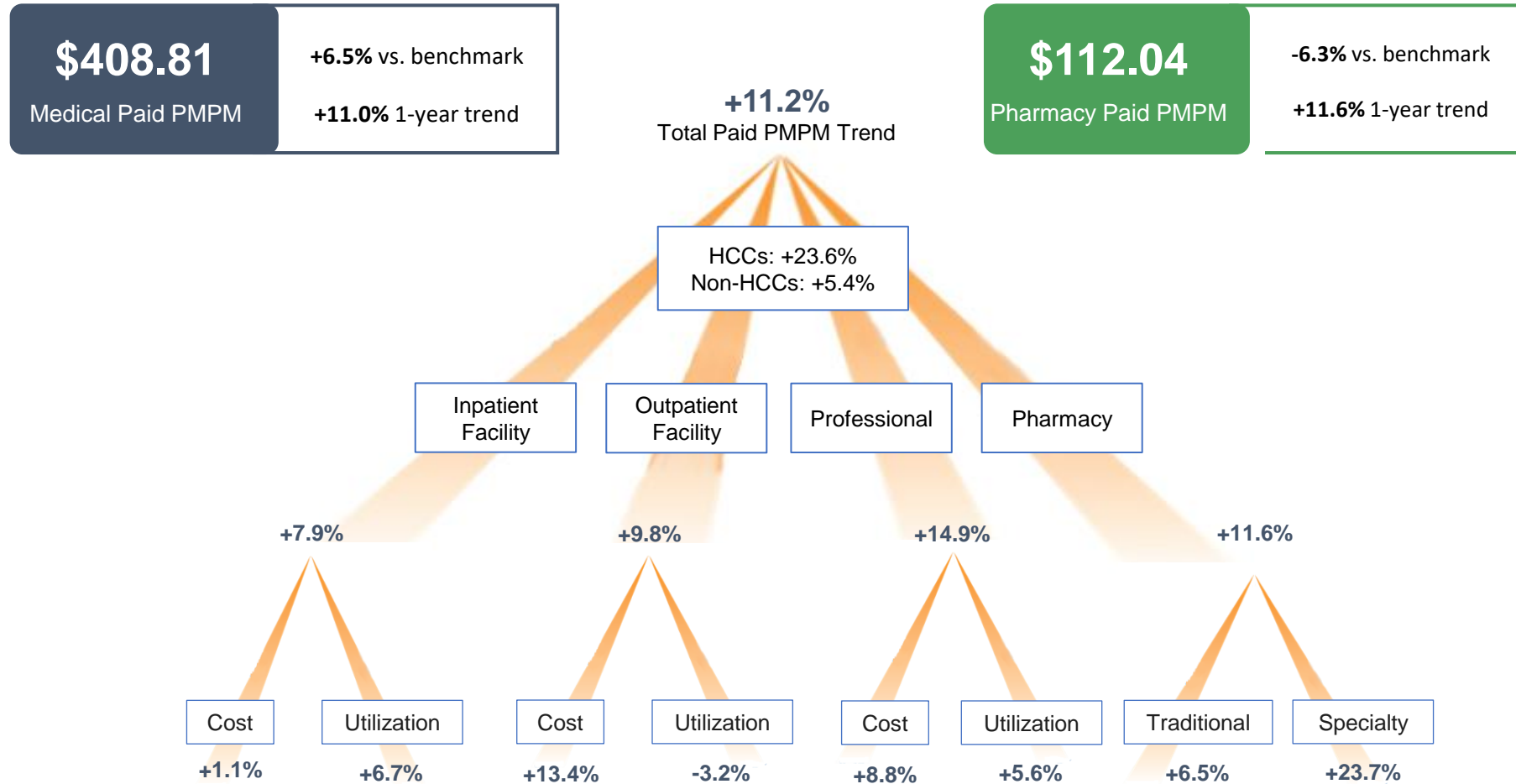
The City has clinical management programs in place to address all above conditions.



Medical Key Indicators

BCBS 2022

HMA Updated



The above chart shows the percent change from prior period to current period in paid PMPM, the percent change in the amount paid per service (cost), and the percent change in the number of services per 1,000 (utilization) by service category. For pharmacy trend, "traditional" incorporates any drugs not on the specialty drug list.



Edited on 7.25.23

Pharmacy Key Indicators

BCBS 2022

HMA Updated



Pharmacy Performance Overview

Know Your Numbers-Full population

PHARMACY

\$112.04

Total Paid PMPM

\$119.60 BoB

\$36.72

Specialty Paid PMPM

\$54.27 BoB

Current Benefit Design

Drug List: **Balanced**

Pharmacy Network:

Advantage Choice-CVS

COST DRIVERS



Autoimmune, Cancer,
Multiple Sclerosis, and
Lung Disorders in the
Specialty Category



Diabetes, HIV, &
Asthma/COPD in the
Non-Specialty Category

TOTAL SAVINGS

\$13,188,140

Utilization Management

(PA, ST, QL)

\$6,805,275

Advantage Network

\$1,203,000

Balanced Formulary

\$5,014,439

MPTD

\$33,929

Exclusive Specialty

\$96,015

Accumulator

\$315,482

POTENTIAL SAVINGS

\$1,615,099

PLAN MANAGEMENT RECOMMENDATIONS

Performance Select Formulary

Managed formulary with
higher savings/rebates
than the Balanced
formulary.

Flex Access

Can provide savings on
specialty medications in
replaces of the Copay
Max program.

Medication Finder

Enables members to
search and fill
prescriptions at lower
costs.



Edited on 7.25.23

Magellan Employee Assistance Program

HMA Updated



Counseling

Coaching

Work-Life
Services

Online
Resources

Workplace
Support

Magellan YTD 2023 Stats (Thru June)

- EAP has been accessed 328 times in 2023 (~5.3% of COD population)
- Top 5 presenting issues (reasons for members seeking services): Anxiety, Marital, Depression, Family/Children, Interpersonal Relationship



Edited on 7.25.23



Convenient Access

Easy Online Enrollment



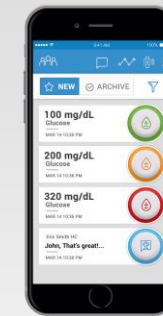
- ◆ Customized landing page
- ◆ Enroll in under 5 minutes
- ◆ Support staff available on email and phone
- ◆ Engaging content, videos and emails to introduce the program

Supplies Shipped Directly to Home



- ◆ Tracked and delivered automatically as needed
- ◆ Unlimited supply

Communicate on your schedule



- ◆ Multiple different methods (secure text, phone, email)
- ◆ Access all program data on smartphone

KANNACT YTD 2023 STATS (Thru June)

- 649 total participants actively working with their health coach.
 - 328 participants are active (participating at a minimum level of activity)
 - 321 participants are actively engaged with Kannact Health Coach (completing a coaching session at least two out of every 3 months in the quarter).
 - 73% of engaged participants had a coaching session in June



Medical History



Orthopedic Examination



Accurate Diagnosis



Patient Education



Medical Necessity



Effective Treatment
 Hands-on Manual Therapy and active Rehab



Patient – Reported outcome



Care Coordination

Q2 2023 Airrosti Participation

Total # of Cases 29
 patients

Avg. Treatment
 Duration (Per Case) 2.6 visits

of Patients who
 chose Airrosti After
 Unsuccessful
 Traditional Care 16
 patients

of Patients who
 chose Airrosti as First
 Treatment Option 13
 patients



Medical History



**Visual
 Orthopedic Examination**



Accurate Diagnosis



Patient Education



Medical Necessity



Effective Treatment
 Remote Recovery Kit
 Provider Directed Mobility & Stability Rehab



Patient – Reported outcome











Care Coordination

Health Advocate

2023 Retiree Concierge and Advocacy Partner



Service	Cost
Retiree Health Concierge Provide retirees with a dedicated solution to help navigate benefit plan resources, the importance of wellness maintenance, and alternative retiree benefits	Allocated 2023 Budget Expense
<div><div><div> Clinical treatment/ decision support</div><div> Care coordination</div><div> In-person and remote second opinion</div><div> Benefits support</div></div><div><div> Schedule appointments</div><div> Transfer medical records</div><div> Facilitate pre-authorizations</div><div> Resolve insurance and billing issues</div></div><div><div>Retiree Advocacy</div></div></div>	Key Features <ul style="list-style-type: none">• Retiree navigation & education• Provides information to retirees on City specific benefits as well as independent coverage options• Resources library• Staffed call center with licensed Medicare advocates – Parts A, B, D, Supp & Advantage• Support whole family (retiree, spouse, parents, dependents)• Wellness engagement & support

Program launched June 1, 2023

- 158 Total Interactions
 - 145 employees
 - 13 other family members
- Top reasons members are reaching out:
 - Benefits Education, Claims Assistance, Routine & Specialty Care Locator, Medicare





City of Dallas

**Previously
Presented Slides**

Benefit Enhancements & Accomplishments 2023



Increased participation in wellness incentive by over 250% to 7,847 EEs in 2022	Implemented SmileWay enhanced chronic conditions benefit to PPO dental plan	Implemented Pet Insurance benefits through MetLife	Lowered OPEB Liability by \$250M
Onsite Health Expo event in 2022	Hosted Future of Work Forum	Offered \$2,000 childcare subsidy for FT Active employees earning less than \$66,000 annually	Implemented City paid Long Term Disability plan in 2022
Marketed and signed contract for Health Advocate for Retiree Concierge Services	Increased enrollment in Kannact diabetes program by 5%	Held FT Active employee medical contributions flat for 2022	Marketed and signed contract for Navigate Health Solutions
Critical Incident Onsite Counseling	Implemented Legal Benefits through MetLife	Continued expanded Virtual Health Access in response to COVID-19	



Benefit Enhancements & Accomplishments 2023



**Enhanced Advanced
Payment Review
(APR)* Projected
Savings \$1.2 million**

**Created Custom
Quarterly Council &
Leadership Report**

**Negotiated Stop Loss
Renewal Savings
\$250,000**

**Medicare Advantage
Negotiation \$1.4
million**

**Coordination of
Onsite Health Expo
Event in 2023**

**New Clinical Engine
Reporting
(CLUE/Artemis)**

**Created Custom
Monthly Financial
Summary**

**Implemented Mark
Cuban Cost Plus
Pharmacy Solution**

**Implementation of
retiree solution
through Health
Advocate 6/1/23**

**Facilitated Wellness
Screening Kit to Pre-
65 Retirees**

**HMA negotiated
current Long Term
Disability Rate
Reduction. Estimated
savings \$500,000**

**Sponsored Onsite
Bexa Breast
Screenings**

**6,794 participants
have completed the
wellness activities as
of June 2023**

**Adding Midwife
Benefit to BCBS
medical plan Oct 1,
2023**

**Introduced mental
health resource,
Headway for
members enrolled in
BCBS medical plan**

2023 cumulative estimated savings of \$20.8M



2023 Retiree Plans & Contribution



Pre65 Retirees have access to coverage through the City of Dallas Self-Funded Plan

Post65 Retirees may access Fully Insured Medicare Advantage plans

Retiree Groups

- Under age 65 Retiree who were hired before 2010. Eligible for City contribution.
- Under age 65 Retiree who were hired in 2010 or after. Not Eligible for City contribution.
- Over age 65 Retiree regardless of hire date. These Retirees pay the full cost of their medical coverage.



Retiree Healthcare – Current State



- The City's plan for pre-65 retired employees is currently self-funded with Blue Cross/Blue Shield

Fully Insured	Self Insured
Plans purchased from insurance company	Plan is designed by the employer
Claims paid by insurance company	Claims paid with money set aside by employer
Plan managed by insurance company	Plan managed by Third Party Administrator (TPA)
More expensive	Less expensive

- The City provides subsidies for pre-65 retirees hired prior to 2010
- For a retiree to receive the post-65 benefits, they must enroll and maintain subscription in the City's pre-65 retiree medical insurance at the time of separation from employment



Self Funded Versus Fully Insured



Fully Insured

(Post-65 Medicare Advantage Plan)

Insurance company incurs an annual profit or loss on each group

Plan designs are regulated and filed at a state level

Networks are pre-defined and cannot be revised to fit access needs

ACA taxes are passed on to the employer via premium rate increases

Self-Funded

(Pre-65 and Active Employee Plans)

Employer is either over or under budget each plan year

Within federal guidelines any plan design is acceptable

Custom provider networks, recruitment, and negotiations

Not subject to all ACA fees



Retiree Medical Plan Design



	Pre-65 Plan	Post-65 Plan
Eligibility	<ul style="list-style-type: none"> Retiree eligible to receive benefits immediately from ERF or DPFP at separation of employment Retiree has continuous coverage from City's active medical plans at time of separation of employment 	<ul style="list-style-type: none"> Same as pre-65 except retiree can separate at or over age 65 or can have continuous coverage from pre-65 plan
Opt-In/Opt-Out	<ul style="list-style-type: none"> Before comeback option, retiree can only opt-in at separation of employment 	<ul style="list-style-type: none"> Comeback option – retiree can come back at age 65 and opt out at separation of employment or before age 65 Once opted-out, retiree cannot return to the plan
Subsidy	<ul style="list-style-type: none"> 50% subsidy provided for retirees hired prior to 1/1/2010 only; does not include spouse or dependents 	<ul style="list-style-type: none"> The City does not subsidize regardless of hire date at any future date, unless certain Medicare Part A members

2023 - Focus on Engagement

- Engage Retiree resource for health care navigation and support



Comeback Option



- A one-time option that can be used within 90 days of Medicare eligibility at age 65 that will allow retirees to come back to a City-sponsored Medicare Advantage plan
- This allows pre-65 retirees to opt-out of the City's pre-65 plans at any time before age 65 and elect coverage outside of the City
- Must show proof of 3 years of continuous coverage right before age 65

Current Pre-65 Blue Choice Copay Retiree Only Monthly Premium	Current Medicare Advantage Retiree Only Monthly Premium
\$613 (pre-2010) / \$1,115 (post-2010)	\$267 (low) - \$329 (high)



Comeback Option



- **Retiree options:**
 - **Enroll in the City's pre-65 plan at time of separation until age 65**
 - **Enroll in the City's pre-65 plan at time of separation, opt-out at any time before age 65, and rejoin the City's post-65 plan (with 3 years of continuous coverage prior to 65)**
 - **Opt-out of the City's pre-65 plan at time of separation and reenroll in the City's post-65 plan (with 3 years of continuous coverage prior to 65)**



Governing Policy Document



City Council Resolution:

- Establish a governing document for retiree medical that clarifies and provides transparency to existing eligibilities, subsidies, opt-in, and opt-out features
- Introduce comeback option that allows pre-65 retiree to return at age 65
- Add requirements for annual and five-year independent actuarial review
 - Ensure consistency of application and provisional integrity of the City Council Resolution
 - Human Resources, City Controller's Office, and Budget and Management Services to sign-off on retiree subsidies each year, including retiree premium rates





City of Dallas

**Historical Wellness Data &
Incentive Participation**

Refined Wellness Incentive & Participation



Our goal is to create awareness and inspire action that leads our employees towards the tools and resources in place to help them achieve their total health and well-being goals.



Refined Wellness Incentive & Participation



2020 Wellness Incentive (September 2019 thru August 2020)

- ✓ 3 Goals: Annual Physical, Health Assessment and Biometric Screening (Aug)
- ✓ \$500 paycheck deposit (Dec)
- ✓ Clinical program options (i.e. Diabetes & HBP medications) for those with elevated risk factors & maintenance programs for those not at risk
- ✓ **Wellness Participation Increased from 1,094 in 2019 to 3,942 in 2020**

2021 Wellness Incentive (September 2020 thru August 2021)

New Simplified Activity

- ✓ **2 Options to earn incentive:**
 - Annual Physical with PCP with labs
 - Catapult Biometric Exam
- ✓ \$500 paycheck deposit (Dec)
- ✓ Clinical program options (i.e. Diabetes & HBP medications) for those with elevated risk factors & maintenance programs for those not at risk
- ✓ **Wellness Participation was 3,107 (COVID year)**

2022 Wellness Incentive

(September 2021 thru August 2022)

- ✓ **2 Options to earn incentive:**
 - Annual Physical with PCP with labs
 - Catapult Biometric Exam
- ✓ \$500 paycheck deposit (Dec)
- ✓ Clinical program options (i.e. Diabetes & HBP medications) for those with elevated risk factors & maintenance programs for those not at risk.
- ✓ **Wellness Participation Increased from 3,107 in 2021 to 8,745 in 2022**



Our Approach to Well Being



- Holistic approach to targeting the cost drivers identified by CLUE through the activities and resources of the new plans
- Continue to build out Total Well-Being Pillars Strategy
- Onboard the new on-site wellness coordinator
- Design communication campaign and calendar plan to implement.



City of Dallas Wellness Initiatives

January – June 2023 National Observances



January	February	March	April	May	June
Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics
<ul style="list-style-type: none"> • Healthy Weight Awareness • National Birth Defects Prevention Month • Thyroid Awareness • Cervical Health Awareness 	<ul style="list-style-type: none"> • Eating Disorders Awareness • American Heart Month • National Wear Red Day • International Prenatal Infection Prevention • Children's Dental Health 	<ul style="list-style-type: none"> • National Drug and Alcohol • Self-Injury Awareness • World Bipolar Day • Sleep Awareness • Developmental Disabilities Awareness • National Colorectal Cancer Awareness • Save Your Vision Month • Brain Awareness • American Diabetes Alert 	<ul style="list-style-type: none"> • Alcohol Awareness • Stress Awareness • National Child Abuse Prevention • Sexual Assault Awareness and Prevention • National Autism, Irritable Bowel Syndrome (IBS), STD, Oral Cancer, Autism Awareness • Counseling Awareness • Financial Literacy • National Volunteer 	<ul style="list-style-type: none"> • Mental Health Awareness – Anxiety and Depression • Disease Awareness - Asthma and Allergy, Stroke, Arthritis, Cystic Fibrosis, HIV, Hepatitis , High Blood Pressure • Melanoma/ Skin Cancer Detection and Prevention • World No Tobacco Day 	<ul style="list-style-type: none"> • National PTSD Awareness • Employee Wellbeing • Alzheimer's and Brain Awareness • Men's Health Month

*Not all on list are actively observed



City of Dallas Proposed Wellness

July – December 2023 National Observances



July	August	September	October	November	December
Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics	Awareness Topics
<ul style="list-style-type: none"> • BIPOC Mental Health • Social Wellness • Make a Difference to Children • 4th of July Drunk Driving Prevention 	<ul style="list-style-type: none"> • National Back to School • National Relaxation Day (Aug. 15) • International Overdose Awareness • National Immunization Awareness 	<ul style="list-style-type: none"> • Suicide Prevention • National Recovery • Pain Awareness • World Suicide Prevention Day • National Cholesterol Education • National Childhood Obesity • National Sickle Cell • Family Health and Fitness • Malnutrition Awareness • International Literacy Day 	COD Active Open Enrollment <ul style="list-style-type: none"> • National Depression and Mental Health Screening and Awareness • Bullying Prevention • Domestic Violence, ADHD, OCD Awareness • National Sudden Infant Death Syndrome Awareness • National Dental Hygiene • Breast Cancer Awareness 	COD Retiree Open Enrollment <ul style="list-style-type: none"> • National Family Caregivers • Adoption Awareness • International Stress Awareness • World Kindness Day • International Survivors of Suicide Loss Day • Great American Smokeout • American Diabetes Awareness 	<ul style="list-style-type: none"> • National Stress-Free Family Holiday's • National Drunk and Drugged Driving • National Influenza Vaccination • National Handwashing Awareness • World AIDS Day • International Day of Persons with Disabilities Day

*Not all on list are actively observed





City of Dallas

Retiree

Post 65 Retiree: Plan & Rate History



	2018	2019	2020	2021	2022	2023
Post Retiree Coverage	7 Medicare Supp – Individual 2 PDP Plans - Individual 2 Medicare Adv. Plans - Group Medicare Supp plans e policies Eliminated Individual plan options Combined medical & Rx coverage	7 Medicare Supp – Individual 2 PDP Plans - Individual 2 Medicare Adv. Plans - Group	2 Medicare Group PPO Advantage Plans Eliminated multiple retiree policies Eliminated Individual plan options Combined medical & Rx coverage	2 Medicare Group PPO Advantage Plans Changed Carrier – BCBS Medical & Rx coverage Specialized Wellness Programs	2 Medicare Group PPO Advantage Plans Changed Carrier – BCBS Medical & Rx coverage Specialized Wellness Programs	2 Medicare Group PPO Advantage Plans Changed Carrier – BCBS Medical & Rx coverage Specialized Wellness Programs
Fully Insured Premium	Medicare Supplement + PDP Varying Rates \$363 – Averaged rates based on age and geographic	Medicare Supplement + PDP Varying Rates \$365 – Averaged rates based on age and geographic	Medicare Advantage High Plan - \$389 Low Plan – \$351	Medicare Advantage High Plan - \$329 Low Plan – \$267	Medicare Advantage High Plan - \$329 Low Plan – \$267	Medicare Advantage High Plan - \$329 Low Plan – \$267

No changes to the 2024 rates



Subsidies Not Covered – No Change

HMA Updated

The City does not currently and will not pay subsidies for the following:

1. **Medicare Part A** premiums unless hired generally prior to April 1, 1986
2. **Medicare Part B premiums**
3. Certain **Post-65** retirees can enroll in **Pre-65 Plans** and will not be subsidized for any benefits
4. Retirees who return under **Comeback Option** unless entitled to grandfathered life insurance
5. **Dental** and **Vision** benefits



Pre-65 Retiree Medical Plan Improvements



	2019	2020	2021	2022
Plan Design	\$2,500 Ded. 75/25 HRA Plan \$2,000 Ded. 80/20 Copay Plan \$3,000 Ded. 80/20 HDHP w/HSA Added HDHP & HSA Added Copay Plan	\$2,500 Ded. 75/25 HRA Plan \$1,500 Ded. 80/20 Copay Plan \$3,000 Ded. 80/20 HDHP w/HSA Enhanced Copay Plan Increased the HSA Contribution	\$1,500 Ded. 80/20 Copay Plan - Blue Choice Network - Blue Essentials Network (PCP) \$3,000 Ded. 80/20 HDHP w/HSA Eliminated the HRA Choice of network	\$1,500 Ded. 80/20 Copay Plan - Blue Choice Network - Blue Essentials Network (PCP) \$3,000 Ded. 80/20 HDHP w/HSA Eliminated the HRA Choice of network
Network Access & Complexity Reduction	Broad Network Enhanced Tier Steerage LocalPlus Network	Broad Network Enhanced Tier Steerage LocalPlus Network Copay Plan Enhancements Increased HSA Funding	Broad Network & Narrow Network Options PCP Designation Specialist Utilization Mgmt. Tax Shelter for Future Medical Expenses	Broad Network & Narrow Network Options PCP Designation Specialist Utilization Mgmt. Tax Shelter for Future Medical Expenses
Preventive Care Coverage (100% Covered)	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med Expanded Preventive Services	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med Expanded Preventive Services	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med Expanded Preventive Services
Pre-65 Retiree Only Rate	Before 2010 / After 2010 HRA - \$654 / \$968 Copay - \$604 / \$908 HDHP - \$554 / \$900	Before 2010 / After 2010 HRA - \$590 / \$1,073 Copay - \$569 / \$1,034 HDHP - \$558 / \$1,014	Before 2010 / After 2010 Blue Choice Copay - \$613 / \$1,115 Blue Ess. Copay - \$636 / \$1,156 HDHP - \$601 / \$1,093	Before 2010 / After 2010 Blue Choice Copay - \$672 / \$1,345 Blue Ess. Copay - \$695 / \$1,389 HDHP - \$650 / \$1,300



Recent Retiree Improvements to Lower Costs



**Moved to
Blue Cross/Blue Shield**

Improved the plan designs

**Simplified Annual
Wellness Requirement**

**Introduced Kannact
Diabetes and
Hypertension program**

**Negotiated an enhanced
network discount with
Baylor and Methodist**

**Introduced additional
benefits to retirees
(waived initiation fees to
gym memberships)**



Retiree Improvements to Lower Costs



Added Health
Advocate

(Retiree Advocacy Program)

Added Navigate
Health

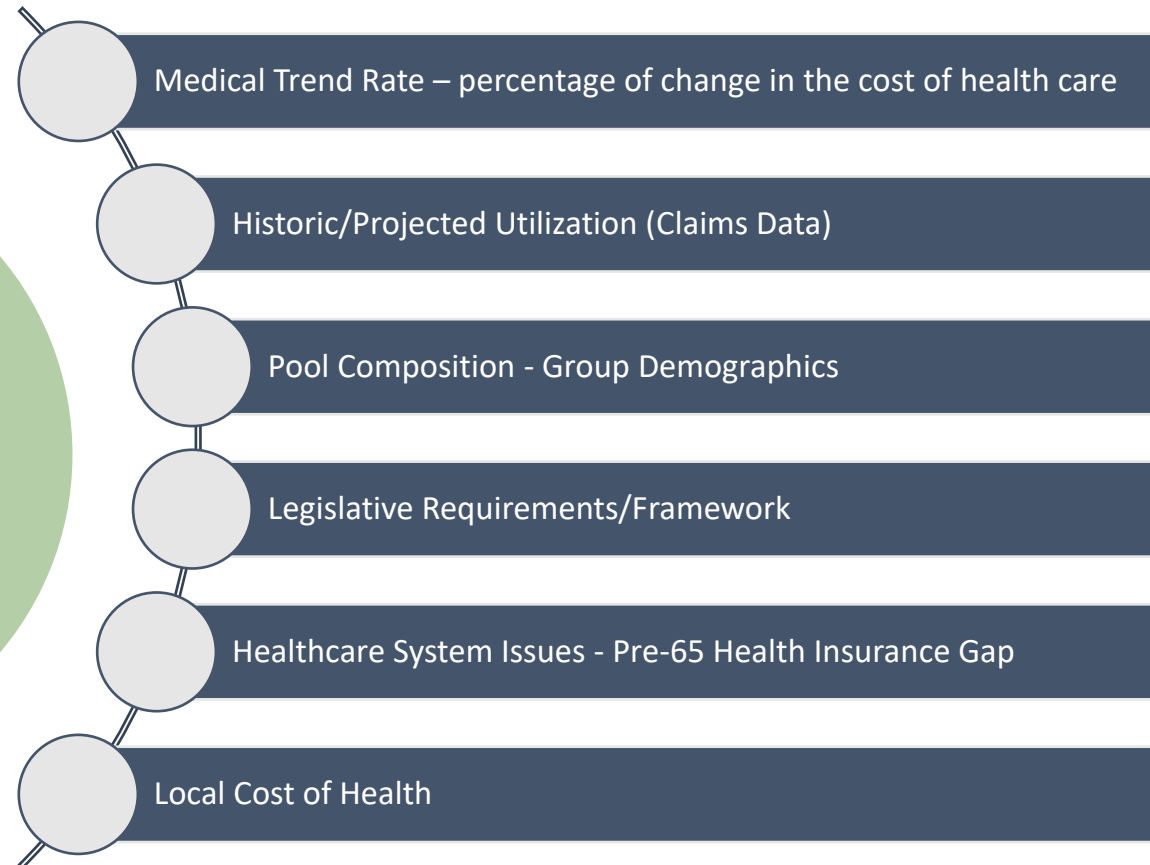
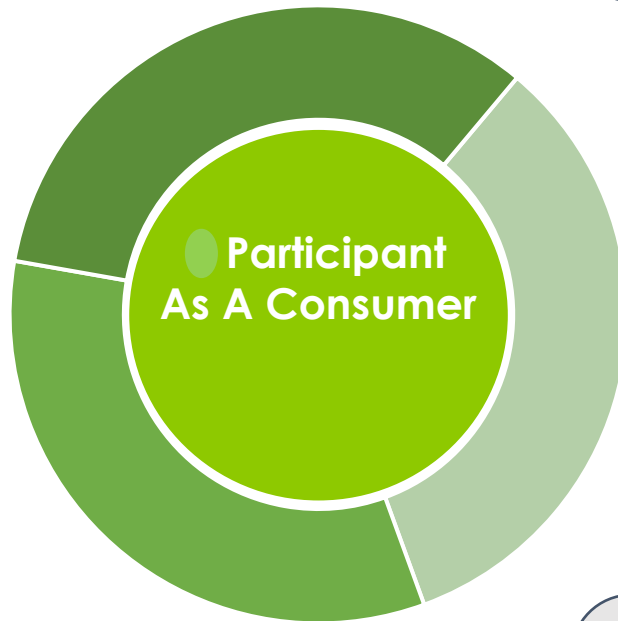
(Online Wellness Resource)

Added Targeted
Clinical Retiree
Communications

Added Pre-65
Retirees to
Wellness Incentive
Eligibility



Health Insurance Cost Factors





City of Dallas

Additional Benefit Details

Offering Competitive Benefits - Medical



	2019	2020	2021	2022
Plan Design	\$2,500 Ded 75/25 HRA Plan \$2,000 Ded 80/20 Copay Plan \$2,800 Ded 80/20 HDHP w/HSA	\$2,500 Ded 75/25 HRA Plan \$2,000 Ded 80/20 Copay Plan \$2,800 Ded 80/20 HDHP w/HSA	\$1,500 Ded 80/20 PCP Plan \$1,500 Ded 80/20 Copay Plan \$2,800 Ded 80/20 HDHP w/HSA	\$1,500 Ded 80/20 PCP Plan \$1,500 Ded 80/20 Copay Plan \$2,800 Ded 80/20 HDHP w/HSA
Network Access and Complexity Reduction	Broad Network Enhanced Tier Steerage LocalPlus Network	Broad Network Enhanced Tier Steerage LocalPlus Network Copay Plan Enhancements Increased HSA Funding	Broad Network & Narrow Network Options PCP Designation Specialist Utilization Management Tax Shelter for Future Medical Expenses	Broad Network & Narrow Network Options PCP Designation Specialist Utilization Management Tax Shelter for Future Medical Expenses
Preventive Care Coverage (100% Covered)	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med Expanded Preventive Services	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med Expanded Preventive Services	Annual Wellness Exam Preventive Medications Free Reduced Cost Diabetic/HBP Med
Wellness - Incentive	\$300 HRS/HSA Contribution \$10 per paycheck premium credit (\$240 value)	3 Clearly Defined Goals \$500 Incentive (December) (Incentive well pay in year earned)	3 Clearly Defined Goals \$500 Incentive (December) (Incentive well pay in year earned)	2 Clearly Defined Goals \$500 Incentive (December) (Incentive will pay in year earned)
Post Retiree Coverage	7 Medicare Supp. Plans 2 DPD Plans 2 Medicare Advantage Plans	2 Medicare Group PPO Advantage Plans (Combined medical & Rx coverage, Specialized Wellness Programs, Eliminated multiple retiree policies)	2 Medicare Group PPO Advantage Plans	2 Medicare Group PPO Advantage Plans

2023 - Focus on Engagement

- Promote importance of age appropriate and preventive care as it relates to overall health status
- Promote clinical programs within medical plan to reduce cost and disease prevalence
- Engage Retiree resource for health care navigation and support



Offering Competitive Benefits – All Other



	2019	2020	2021	2022
Dental Vision	Two dental plans One vision plan offered	Two dental plans One vision plan offered	Two dental plans, enhanced PPO offered Two vision plan offered	Two dental plans Two vision plan offered
Life	\$50,000 basic life coverage Voluntary life coverage offered	\$50,000 basic life coverage Mid-year Increased to \$75,000 Voluntary life coverage offered	\$75,000 basic life coverage Voluntary life coverage offered	\$75,000 Basic Life coverage Voluntary life coverage offered
Disability	Individual plans offered	Group voluntary short and long term disability offered	Group voluntary short and long term disability offered	Group voluntary short term disability Group employer paid long term disability offered at 1-year of service
Worksite Benefits	Individual accident, critical illness, and legal plans offered	Group accident, critical illness, hospital indemnity plans offered	Same group plans offered with enhanced health screening benefit for critical illness and hospital indemnity plans	Group accident, critical illness, hospital indemnity plans offered Procuring pet insurance and group legal/ID theft coverage
Employee Assistance Program (EAP)	Standard EAP program offered to all employees	Standard EAP program offered to all employees	Engaged stand alone EAP resource Employee webinars offered by EAP vendor	Stand alone EAP resource Employee webinars offered by EAP vendor
Clinical Programs	Kannact Diabetes Program offered. Clinical resources, testing supplies and equipment.	Obtained CLUE* data Kannact Diabetes Program *(Clinical Learning and Understanding Engine)	Obtained updated CLUE data Kannact Diabetes Program with employee engagement campaign	Obtained CLUE data Kannact Diabetes and Cardiovascular Program
Wellbeing	Wellness Incentive	Wellbeing plan development including phased approach to disease states	Wellbeing pillars developed (social, financial, physical, community, mental)	Development of wellbeing logo Introduction of wellbeing newsletter
Systems	Enrollment through Lawson	Engaged EBC for active and pre-65 retiree enrollment	Engaged EBC for active, pre and post-65 retiree enrollment	Engaged EBC for active, pre and post-65 retiree enrollment

2023 - Focus on Engagement

- Promote importance annual dental & vision screenings and the connection to undiagnosed medical conditions
- Partner with a wellness vendor to promote wellness and wellbeing health improvement and maintenance



Value-added Blue Cross/Blue Shield Benefits



	Blue365	Member Rewards Program	Enhanced Provider Discounts
How this Helps our Employees/Retirees/Dependents	Health & Wellness discounts for: Apparel & Footwear, Fitness Equipment, Hearing & Vision products, Nutritional Goods, and Personal Care items	Cash rewards when a member chooses a higher quality, lower cost provider for a procedure. Member must call Blue Cross Benefits Value Adviser to start this process. Member reward is typically mailed within 4 to 6 weeks after procedure is completed.	Lowers cost the cost of care for our members through an enhanced Network Discount off allowed charges that In-Network Providers agree to through the Blue Cross contract with the City.
Cost to Members	None. Included with enrollment	None. Included with enrollment	None. Included with enrollment

Fantastic Year 2 Member Rewards Engagement

- 7,250 households activated Member Rewards
- 3,013 households shopped Member Rewards
- 1,022 households converted member rewards



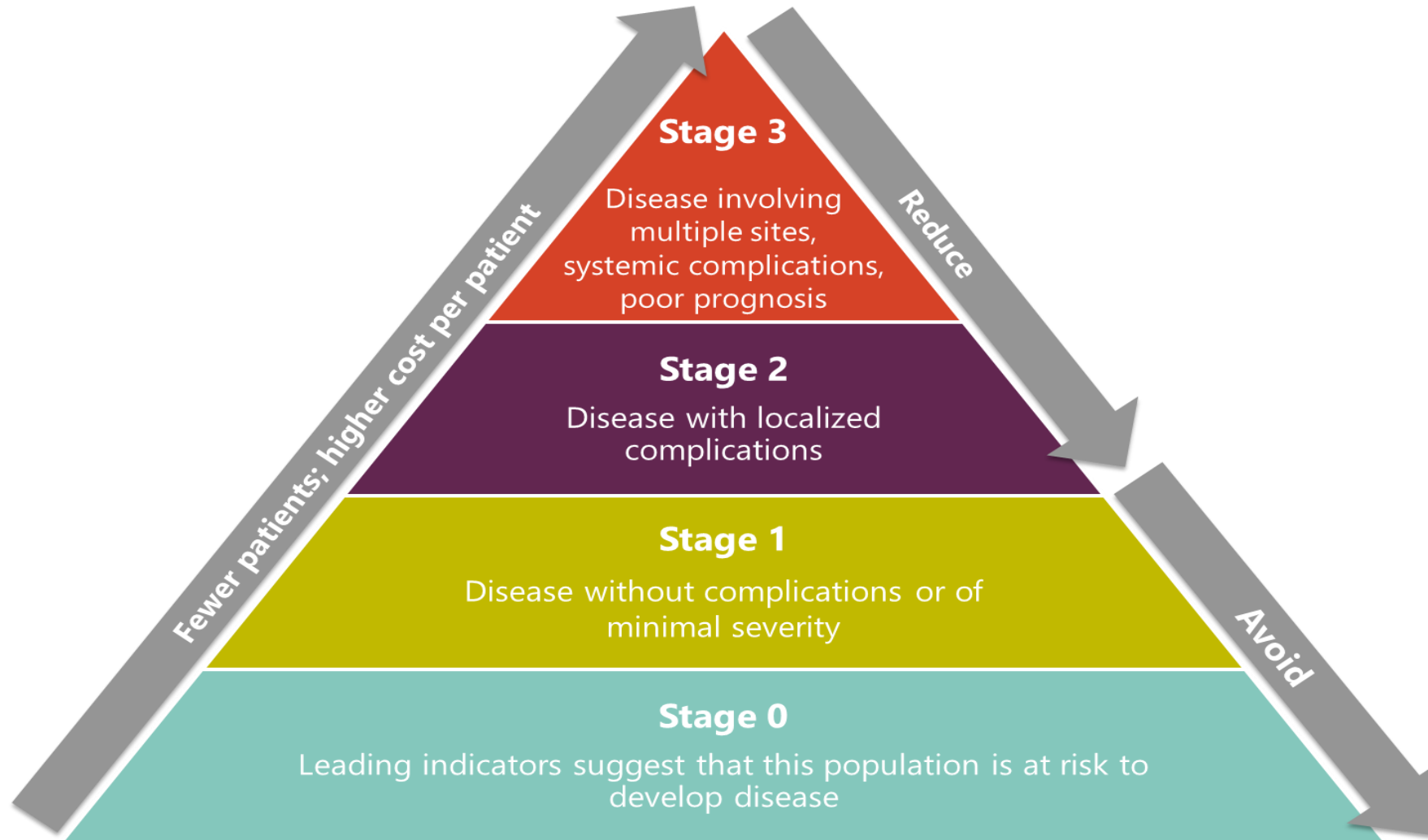
Phased Approach to Wellness by Disease State



	Musculoskeletal, Cardiovascular 27% Prevalence in 2022	Diabetes, Weight, Hypertension 31% Prevalence in 2022	Cancer 9% Prevalence in 2022	Mental Health 14% Prevalence in 2022
Baseline (Require biometric screenings and age- appropriate exams)	Annual wellness exam (Establish medical home)	Annual wellness exam (Establish medical home)	Annual wellness exam (Establish medical home)	Annual wellness exam (Establish medical home)
Phase 1 (2020)	<ul style="list-style-type: none"> Physical Therapy Rx Solution* compliance 	<ul style="list-style-type: none"> Rx Solutions* Clinical Coach Fitness Center Nutrition Center 	<ul style="list-style-type: none"> Cancer Specific Screenings 	<ul style="list-style-type: none"> EAP Telehealth COD Resources
Phase 2 (2021 - 2022)	<ul style="list-style-type: none"> Airrosti Disease Management Programs Medical plan Condition Mgmt Coaching Rx Management Programs CareATC Referrals 	<ul style="list-style-type: none"> Weighty Loss Programs Medical plan Lifestyle Coaching / Disease Management Programs Baylor & Methodist Programs CareATC 	<ul style="list-style-type: none"> Non-surgical treatment Medical plan Condition Mgmt Coaching Baylor & Methodist Programs 	<ul style="list-style-type: none"> Expanded EAP offering Improved access- Behavioral telehealth Baylor & Methodist Programs
Phase 3 (2022 – 2023)	<ul style="list-style-type: none"> Regenexx Centers of Excellence 2nd Opinion Care Management 	<ul style="list-style-type: none"> Centers of Excellence 2nd Opinion Care Management 	<ul style="list-style-type: none"> Centers of Excellence 2nd Opinion Care Management 	<ul style="list-style-type: none"> Centers of Excellence Care Management
Incentives	Lower copays/out-of-pocket costs; preventing surgery	Lower copays/out-of-pocket costs; better outcomes resulting from steerage	Early detection improves outcomes and lowers costs	Work/Life balance; addressing entire employee



CLUE Disease Stages



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City of Dallas

Wellbeing Pillars

Well-Being Pillars



Social Pillar Programs

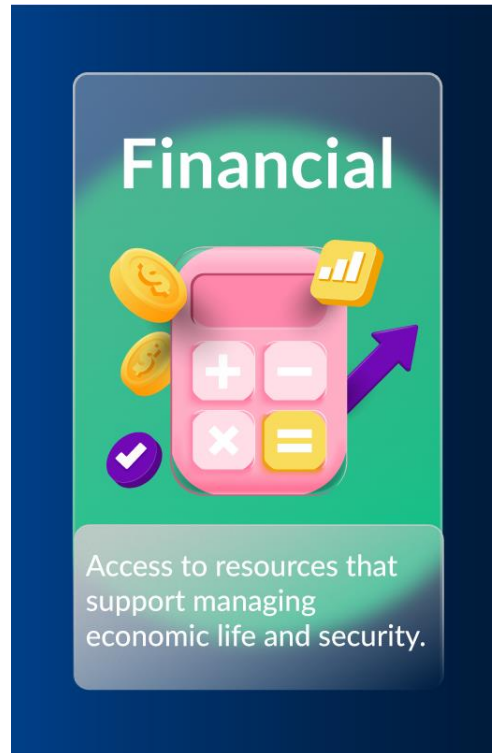


Promoting and sustaining supportive and positive relationships

- City of Dallas Hiring Events
- Diversity Dashboard
- Educational Partnerships
- Employee Engagement Survey
- Employee Recognition (Service Pins)
- Internship Programs
- Magellan EAP Resources
- Recruitment Guide
- Upskilling Workforce
- Virtual/On-site Health Expos



Financial Pillar Programs

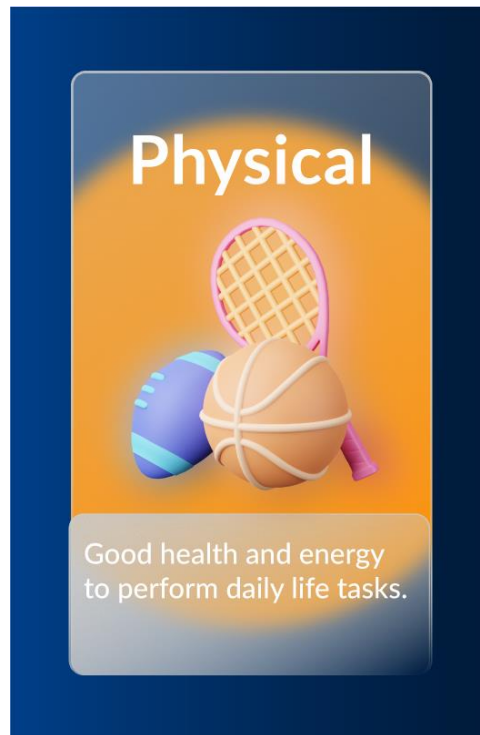


Access to resources that support managing economic life and security

- Childcare Subsidy
- DART Passes
- Employee Perks Portal by Abenity
- Financial Wellness Resources
- Legal Shield
- MetLife Pet Insurance
- Magellan EAP Resources
- PNC Bank Partnership
- Tuition Assistance Program



Physical Pillar Programs

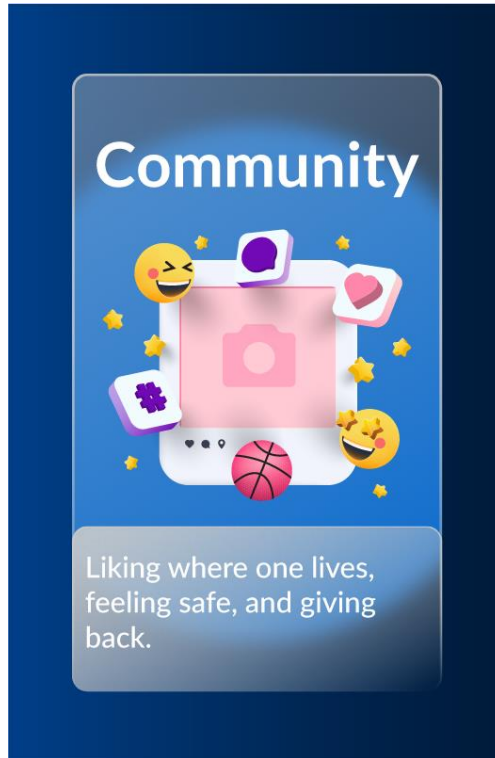


Good health and energy to perform daily life tasks

- Alternative Care (Airrosti, Chiropractor)
- Annual Physical/Wellness Assessment
- Biometric Screenings
- COVID-19 Support and Resources
- Diabetes Hypertension Program
- Fitness Centers
- Flu Shots
- Foundations Café
- Gym Discounts
- Health Coaching (BCBS)
- Health Education Literacy
- Health Risk Assessments
- Holistic Health (Acupuncture, Meditation)
- Long-term and Short-term Disability
- Magellan EAP Resources
- Mobile Mammograms
- Online Fitness Classes
- Onsite/Near Site Clinics
- Telemedicine
- Tobacco Cessation
- Virtual/Onsite Health Expos
- Weight Management
- Wellness Challenges (IP and BCBS)
- Wellness Portal (Coming Soon)



Community Pillar Programs

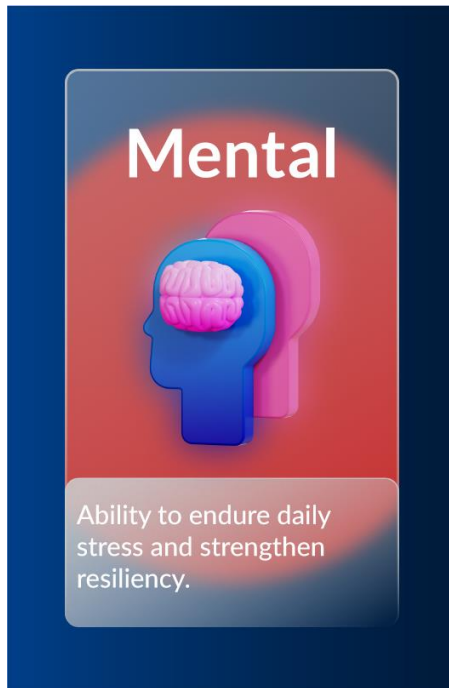


Liking where one lives and feeling safe in the environment and giving back

- City of Dallas Future of Work Program
- Community Service Event during Customer Service Week
- Dallas Charitable Giving Campaign
- Dallas Heart Walk
- Diversity Dashboard
- Employee Cares Committee (ECC)
- Employee Focus Groups
- Employee Relations Portal
- Employee Resource Groups (ERGs)
- Hybrid Work Opportunities
- Internship Programs
- Personnel Rules and Administrative Directives
- Recruitment Guide



Mental Pillar Programs



Ability to endure daily stress and strengthen resiliency

- COVID-19 Support and Resources
- Critical Incident Support Management via EAP
- Fit For Duty Assessments
- FMLA Leave
- Magellan EAP Resources
- Mental Health Leave
- Paid Parental Leave



Additional Employee Benefits Not Funded Through Benefits Fund



Upskilling



Workday Benefits
Recruitment Modules



Expanded Educational
Reimbursement



Employee Discounts



Best Practices – Best Place to Work Experience



Meaningful Work	Strong Management	Positive Workplace	Health & Wellbeing	Growth Opportunity	Trust in the Organization
Job and values fit	Clear goals with stretch opportunity	Tools, processes and systems to get work done productively	Safety and security in all aspects of work	Open, facilitated job and role mobility	Mission and purpose beyond financial goals
Autonomy and agency	Regular coaching and feedback	Appreciation, recognition, and rewards	Personal fitness, health, and physical wellbeing support	Career growth in multiple paths	Transparency, empathy, and integrity of leadership
Agile teams, supportive coworkers	A focus on management development	Flexible hours and workspace	Psychological and emotional wellbeing and support	Many forms of learning as needed	Continuous investment in people
Time to focus, innovate, and recover	Transparent, simple performance management	Inclusive, diverse, and sense of belonging and community	Family and financial support	A culture that supports learning	Focus on society, environment, and community

Strength of impact

Moderate

Medium

High

Very High

Source: Employee Experience: The Definitive Guide, © Josh Bersin Research, April 2021



2022/23 Retention Strategies and Highlights



Compensation & Benefits

- Implemented Phased Comp Study - Adjusted 3,614 employees' salaries, using \$3.4M from the General Fund and \$2.72 from Enterprise and other funds
- Aligned Min Wage to match MIT Living Wage
- Performance and Wellness Incentives
- COD Pension and 457 provide retirement security and options ahead of market
- Tiered premium benefits pricing
- PNC - City of Dallas Workplace Banking

Balance & Flexibility

- City Council approved paid parental leave
- Implemented Mental Health Platform Navigate
- Attendance Incentive Leave (AIL)
- Compassionate Leave
- Quarantine Leave
- Implemented Telework Program
- City Council approved mental health leave put the COD on par with market and ahead of government organizations
- Total Wellbeing Portal

Upskilling & Development

- Career Series Structure
- Added dedicated resource in 2023 to develop and manage formal upskilling program
- Education Partnerships and Discounts
- Tuition reimbursement
- College level internship program
- Linked-In online training on demand available to all employees
- SERVE Leadership Training Program



23/24 Program Continuation and Go Forward



Compensation & Benefits

- Implement pay-for-performance program for executives (approved for 2023)
- Use whole market comparables for competitive and hard-to-fill positions and functions

Balance & Flexibility

- Increase vacation allowance based on position level to match market
- Invest in change management and programs to help managers move to a culture that values work-life balance
- Provide COD managers training and resources to help them move to an employee-centric operations model
- Invest in spaces and systems that support a distributed workforce

Upskilling & Development

- Implement Workday Learning (approved for 2023)
- Expand Educational partnerships (Underway in 2023)
- Implement formal upskilling process (Underway in 2023)
- Increase support for Trade and related certifications



Other 23/24 Goals and Strategies



Strengthen Employer Brand

- Launch employee recruitment campaign
- According to research done by LinkedIn, a strong employer brand can reduce an organization's turnover by 28%.

Continue Biennial Employee Engagement Survey

- Compare results to previous years' results to identify and recognize progress, trends, and areas for improvement.

Continue to Invest in Supervisor Training and Resources

- Allocate resources, such as time and money, towards developing and improving the skills and knowledge of supervisors and managers.

Leverage Data and Technology

- Implement Workday Phase II for Performance and Development.
- Utilize dashboards and reports to drive decision making.

Embed Internships into Departmental Organizational Structures

- Fund Internship positions through 2023-24 Budget Process.

Develop a Formal Mentoring Program

- Conduct a pilot program to use mentoring to drive professional development and employee retention.





City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-2057

Item #: C.

FY 2023-24 Budget Workshop: General Obligation Debt Overview and Financial Capacity

The presentation will be uploaded as soon as it is available.
Please check back for updates.



City of Dallas

1500 Marilla Street
Council Chambers, 6th Floor
Dallas, Texas 75201

Agenda Information Sheet

File #: 23-2079

Item #: D.

2024 Bond Update



City of Dallas

2024 Bond Update

**City Council Briefing
August 16, 2023**

**Jennifer Nicewander, P.E., (I) Director
Office of Bond and Construction
Management**

Overview



- 2024 Bond Development Status
- Updated 2024 Bond Capacity
- Needs Inventory Updates
- Equity
- Community Bond Task Force (CBTF) Update/Schedule
- Community Feedback
- Previous Bond Breakdown
- Questions



2024 Bond Development Status



- Completed 16 Town Hall meetings in early summer.
- Completed 25 CBTF meetings;
 - Meetings began in May, recessed in July, and resumed in August.
- Subcommittees are developing scenarios for allocations by category and propositions as well as project prioritization.
- Needs Inventory has been updated with projected construction costs through FY 2027.



Updated 2024 Bond Capacity



- 2024 Bond Program capacity is \$1.0B.
- Cost overruns for 2017 and Legacy Bond Projects will be completed using \$200M+/- of Certificates of Obligation.

Proposition	Original Recommendation	Council Feedback	Department Request	Proposed
Streets	\$485,000,000	\$396,500,000	\$520,000,000	\$440,000,000
Park & Recreation	\$125,000,000	\$175,000,000	\$400,000,000	\$165,000,000
Transportation	\$50,000,000	\$48,500,000	\$176,000,000	\$55,000,000
Flood Protection, Storm Drainage and Erosion Control	\$35,000,000	\$60,500,000	\$150,000,000	\$55,000,000
Housing Infrastructure	\$125,000,000	\$150,000,000	\$150,000,000	\$88,000,000
Economic Development	\$100,000,000	\$52,000,000	\$100,000,000	\$33,000,000
Public Safety Facilities (PSF) - Combined	\$25,000,000	\$52,500,000	\$0	\$0
Public Safety Facilities - Fire	\$0	\$0	\$93,000,000	\$27,500,000
Public Safety - Fire Training Facility	\$0	\$0	\$25,000,000	\$5,500,000
Public Safety Facilities - Police	\$0	\$0	\$270,000,000	\$5,500,000
Public Safety - Police Training Facility	\$0	\$0	\$50,000,000	\$55,000,000
Cultural and Performing Arts Facilities	\$15,000,000	\$48,000,000	\$68,500,000	\$55,000,000
City Facilities	\$25,000,000	\$28,250,000	\$76,000,000	\$27,500,000
Library Facilities	\$15,000,000	\$25,000,000	\$54,000,000	\$38,500,000
Homeless Assistance Facilities	\$0	\$10,500,000	\$38,000,000	\$22,000,000
Information Technology	\$0	\$16,900,000	\$135,000,000	\$27,500,000
Totals	\$1,000,000,000	\$1,063,650,000	\$2,305,500,000	\$1,100,000,000



Needs Inventory Updates



- The Needs Inventory has been update based upon latest construction project costs; **Needs Inventory now totals \$16.6B).**
- Public Works added the “Unimproved Streets” and “Unimproved Alley” categories \$2.2B not previously accounted for.

Program	Sum of Estimate
City Facilities	\$649,756,539.61
Court Facilities	\$107,638,792.65
Cultural Arts Facilities	\$166,826,868.56
Flood Protection and Storm Drainage	\$2,528,460,500.00
Homeless Assistance Facilities	\$35,000,000.00
Library Facilities	\$106,668,601.00
Park and Recreation Facilities	\$3,183,468,143.00
Public Safety Facilities	\$1,200,167,402.59
Street and Transportation	\$8,617,243,300.91
Grand Total	\$16,595,230,148.32



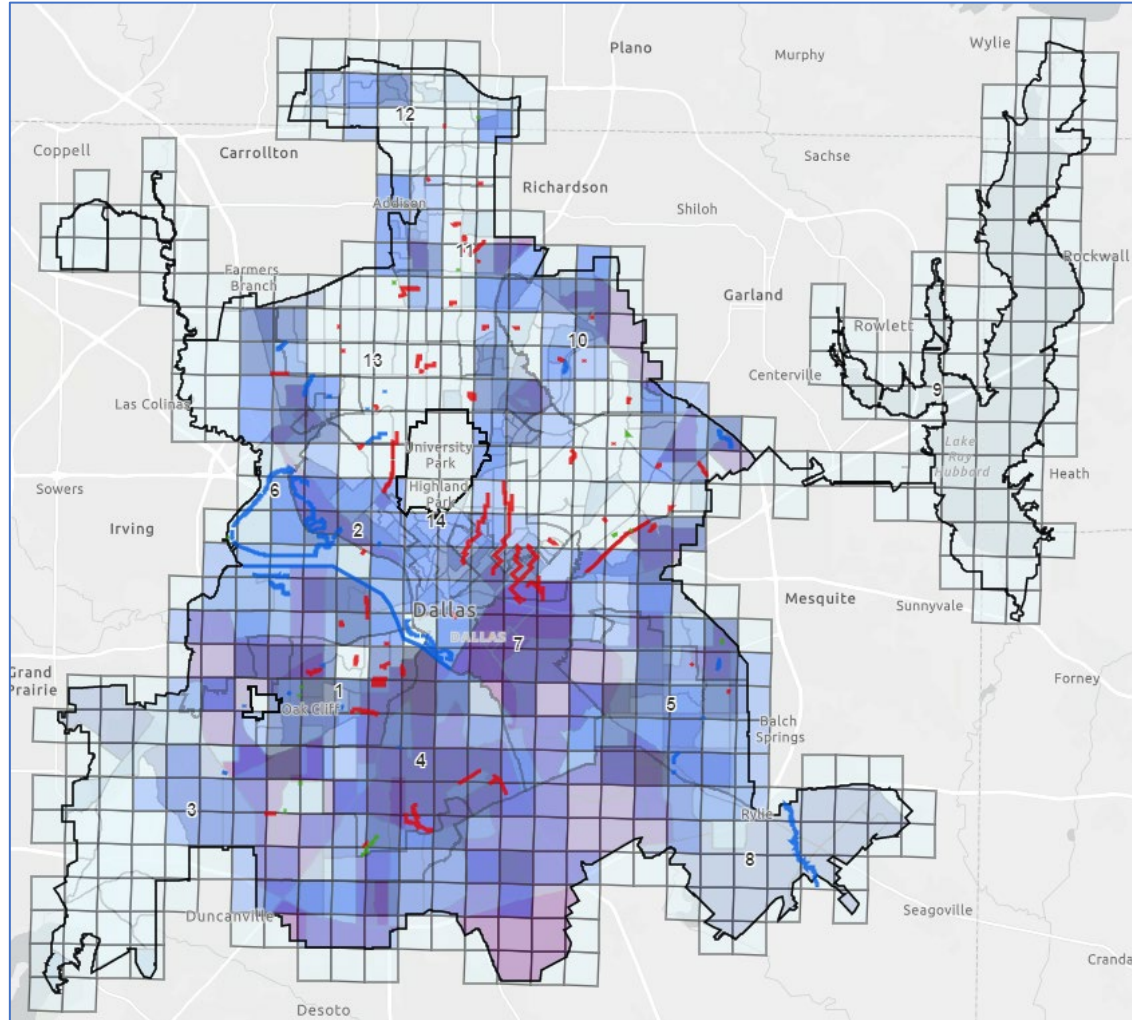
Equity



- Goal: 30% of overall bond investment in Equity Areas:
 - Goal is based on feedback received during a recent CBTF subcommittee meeting.
 - Staff is evaluating equity funding scenarios, not just by project points but overall bond funding levels.
 - Office of Equity and Inclusion (OEI) is leading the effort to identify the projects for the equity investments.
 - BCM will work with CBTF and subcommittees to adjust proposed programs based on equity investment recommendations.
 - 1st Draft of the Proposed Bond Program will be provided by the subcommittees on August 29th.



Equity



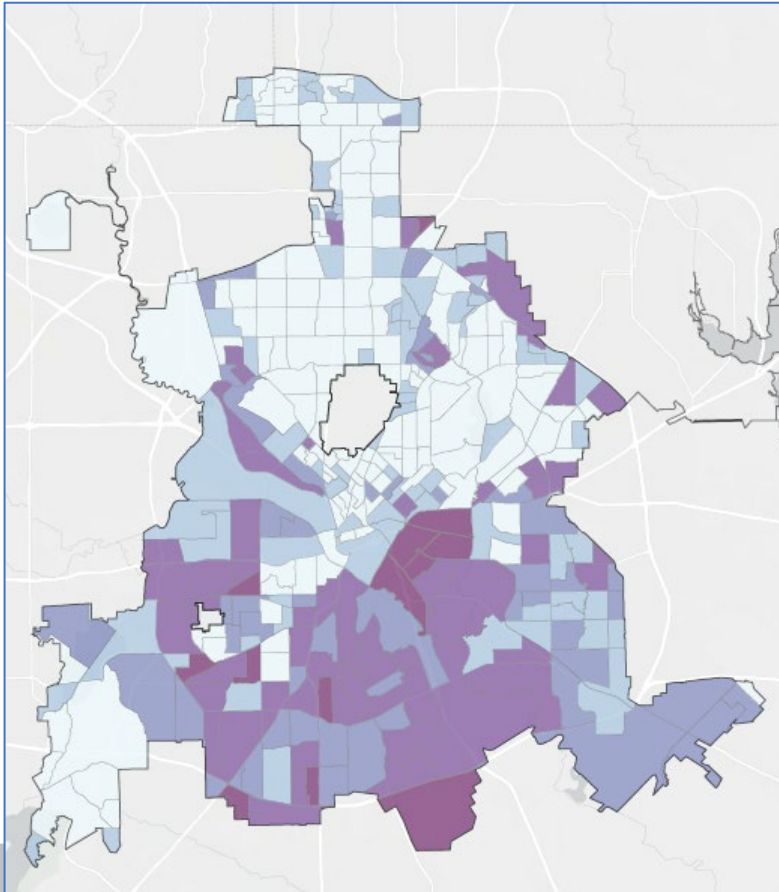
- Equity is used in project selection based upon scoring.
- Working with OEI:
 - Entire city is given a ranking; 1-5
 - Equity Impact Assessment (EIA) score multiplies ranking by 2 for total points used.
- (Example left) Map represents spatial analysis of DWU projects, EIA areas, and the following priority overlays:
 - High Crime Areas
 - 311 Service Requests
Identifying calls for Flooding, Speeding, Traffic Calming, Potholes, Street Resurfacing, and Illegal Dumping
 - TOD (DART Sites)
 - Market Value Analysis
 - Intersection/ Project Overlay



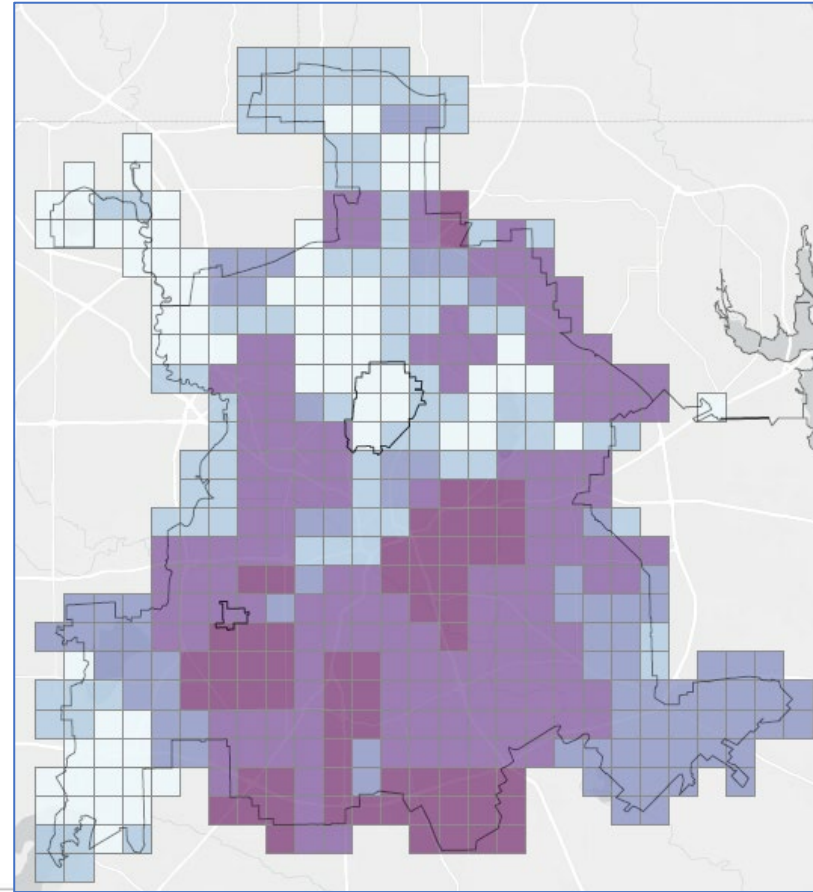
Equity



**EIA Scores at the census
tract level (EIA areas
given a score from 1-5)**



**EIA Scores Normalized to
1-mile x 1-mile Grids**



CBTF Progress Update & Schedule



- CBTF and Subcommittees have been meeting since May.
- Additional meetings are planned with CBTF and Chairs to develop the Draft Bond Program before the Fall Townhalls.
- All meetings are on the Bond webpage along with briefing materials.

City of Dallas

Resident Visitor Business Government News 311

Office of Bond & Construction Management

HOME

ABOUT

2017 BOND PROGRAM INFORMATION

2024 CAPITAL BOND PROGRAM INFORMATION

2024 COMMUNITY BOND TASK FORCE AND SUBCOMMITTEE MEETINGS

CITY NEEDS INVENTORY LIST

UPCOMING EVENTS

FREQUENTLY ASKED QUESTIONS

Office of Bond and Construction Management

Mission

The Office of Bond and Construction Management (BCM) was created to provide oversight of the City's bond programs to ensure the efficient, equitable, and transparent delivery of infrastructure improvements to the Dallas community.

COMMUNITY BOND TASK FORCE	THURSDAY, MAY 11, 2023 - CBTF MEETING #1	CBTF MEETING #1 SUMMARY
CRITICAL FACILITIES SUBCOMMITTEE	THURSDAY, MAY 25, 2023 - CBTF MEETING #2	CBTF MEETING #1 VIDEO
ECONOMIC DEVELOPMENT, HOUSING, AND HOMELESS SOLUTIONS SUBCOMMITTEE	TUESDAY, JUNE 13, 2023 - CBTF MEETING #3	2024 CAPITAL BOND PROGRAM: BOND 101 PRESENTATION
FLOOD CONTROL AND STORM DRAINAGE SUBCOMMITTEE	TUESDAY, JUNE 20, 2023 - CBTF MEETING #4	PROGRAMA DE BONOS DE CAPITAL 2024: PRESENTACION DE BONOS 101



CBTF Progress Update & Schedule



August

CBTF meetings resume with the subcommittees presenting their proposed program on August 29th

Community Poll on Allocations closes on August 25th

September

CBTF and Chairs will meet to finalize the Proposed Bond Program before taking it to the community as part of the Fall Townhalls

Townhalls start on September 26th

October

Townhalls end on October 13th

CBTF and Chairs will review the community feed back from the Townhalls to refine the Proposed Draft 2024 Bond Program



CBTF Progress Update & Schedule



November

CBTF, Chairs and Dallas City Manager to finalize the Proposed Bond Program

December

December 6th - CBTF Chair and Dallas City Manager briefs Council on Proposed 2024 Draft Bond Program

January

Public Hearings on the Proposed Bond Program

City Council review program and makes edits

City Council to call for an election January 24th, for an election in May



Community Feedback



- During Summer Townhalls, BCM informed residents of a poll on BCM's website. The poll was used to gauge Community's priorities related to the upcoming Bond.
- Unscientific, only residents who knew or were interested in providing their opinion took the poll.
- Over 800 responses.
- Could be used to guide general themes of the upcoming election.



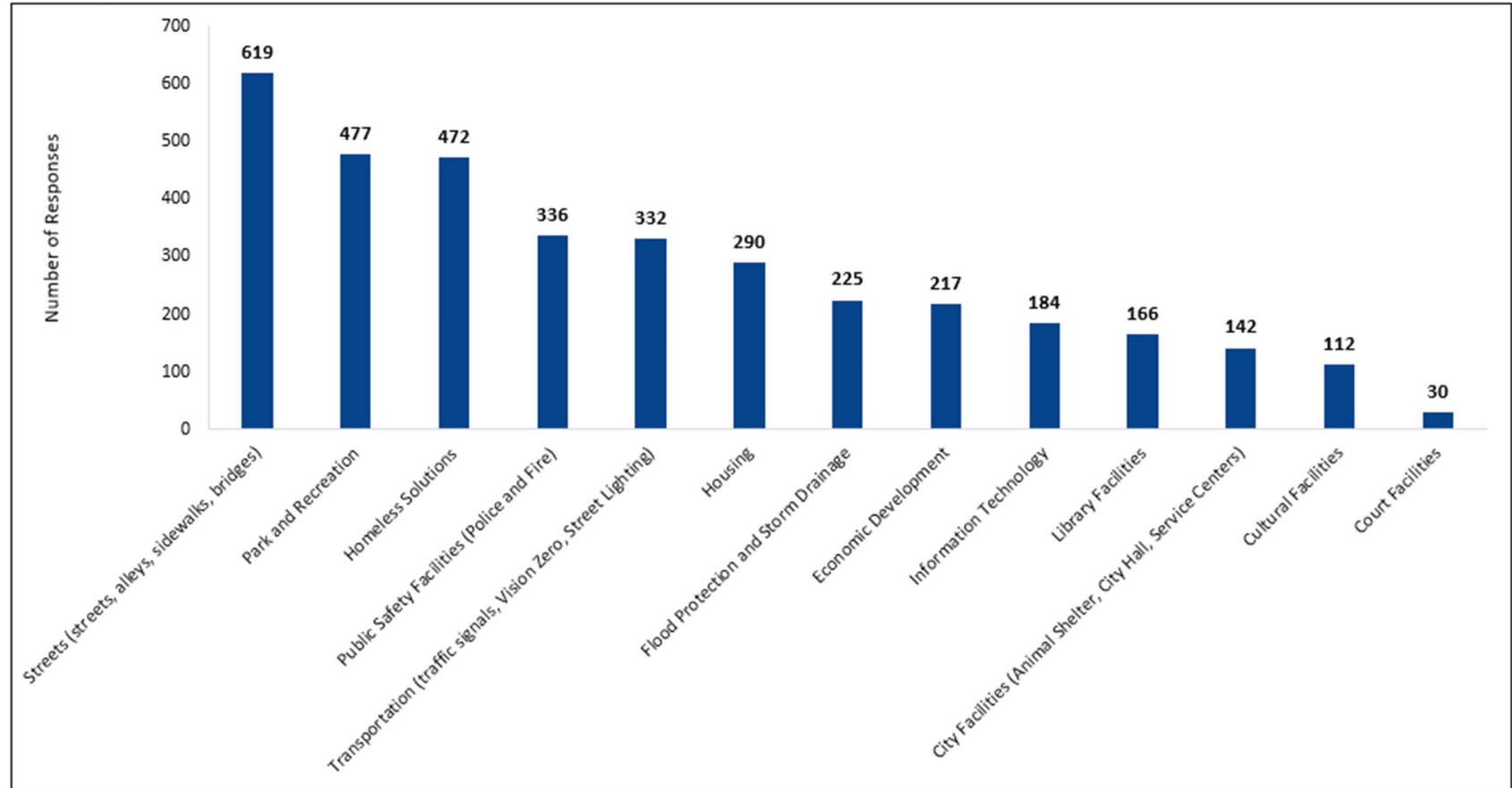
Community Feedback



Top 6 Propositions:

- Streets
- Parks and Recreation
- Homeless Solutions
- Public Safety Facilities (Police & Fire)
- Transportation
- Housing

Please rank your top five propositions by priority.




- A total of 803 Dallas residents responded to this question. However, please note that this question allows multiple selections.
- The largest number of respondents, 619 (77.1%), favored streets (streets, alleys, sidewalks, bridges) as the first top priority.
- Park and recreation was the second most selected priority by 477 (59.4%) respondents.
- The third most selected proposition was Homeless solutions by 472 (58.78%) respondents.



Community Feedback



- Based upon recommendation from the CBTF, BCM is conducting additional community input.
- A similar poll for Bond allocations is open to the community.
- Allocation Poll to the public through August 25th.
- Will provide results to CBTF and council for they use in developing their program.



**Bond & Construction
Management**


English (United States) ▼

2024 Capital Bond Program Funding Allocation Poll

Using all the options below how would you spend a total of \$1000 Bond Dollars somewhere else?
We want to hear from you!

Please note your final selection must equal \$1000, also this Poll is for discussion purposes only.

Encuesta En Español <https://forms.office.com/g/jav7vU5MkM>



* Required

1. For the upcoming 2024 Bond, as a planning exercise, if you had \$1,000 to invest, how would you distribute the money using the categories and dollar amounts below?

	\$25	\$50	\$100	\$150	\$200	\$250	\$500
Streets & Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parks and Trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Previous Bond Breakdowns



- Summary of Past Bond Funding – Council Specific

Note: CD's listed are the CD's identified at the time of the bond project listed.

Summary of Past Bond Funding					
	2003 Bond	2006 Bond Program	2012 Bond Program	2017 Bond Program	Grand Total
Sum of Bond Value	\$578,943,656	\$1,353,522,737	\$642,000,000	\$1,050,000,001	\$3,624,466,394

Summary of Past Bond Funding - by Council Specific Projects					
Council District	2003 Bond	2006 Bond Program	2012 Bond Program	2017 Bond Program	Grand Total
1	\$13,804,517	\$13,674,111	\$16,691,900	\$36,459,000	\$80,629,528
2	\$31,883,635	\$16,107,199	\$10,329,700	\$33,188,000	\$91,508,534
3	\$17,591,424	\$25,870,988	\$10,913,500	\$45,974,000	\$100,349,912
4	\$14,295,734	\$13,420,682	\$11,610,200	\$46,039,001	\$85,365,617
5	\$9,371,913	\$21,743,719	\$17,831,600	\$53,927,000	\$102,874,232
6	\$10,002,508	\$31,320,590	\$7,666,800	\$52,224,000	\$101,213,898
7	\$13,201,814	\$7,879,346	\$16,184,000	\$40,424,000	\$77,689,160
8	\$17,364,932	\$21,634,794	\$11,081,900	\$48,162,999	\$98,244,625
9	\$14,392,878	\$23,155,271	\$13,523,100	\$53,533,000	\$104,604,249
10	\$8,350,025	\$16,625,276	\$16,123,400	\$65,075,001	\$106,173,702
11	\$8,618,324	\$18,541,523	\$15,087,400	\$48,975,000	\$91,222,247
12	\$15,548,495	\$16,904,333	\$15,978,200	\$48,032,000	\$96,463,029
13	\$13,418,499	\$10,847,289	\$16,041,900	\$52,981,000	\$93,288,688
14	\$26,285,258	\$21,155,553	\$9,722,200	\$57,593,999	\$114,757,010
CW	\$299,065,187	\$1,058,432,433	\$434,497,200	\$253,509,000	\$2,045,503,820
Grand Total	\$513,195,144	\$1,317,313,107	\$623,283,000	\$936,097,001	\$3,389,888,252



Previous Bond Breakdowns



- Summary of Past Bond Funding – City Wide

Summary of Past Bond Funding - by CW or Multiple Council District Projects					
Council District	2003 Bond	2006 Bond	2012 Bond	2017 Bond	Grand Total
1, 10		\$4,031,560			\$4,031,560
1, 2, 6				\$4,600,000	\$4,600,000
1, 2, 5, 10, 11				\$11,000,000	\$11,000,000
1, 3	\$2,070,000	\$5,304,302	\$474,600	\$4,000,000	\$11,848,902
1, 3, 6	\$168,000				\$168,000
1, 4	\$1,106,884			\$7,100,000	\$8,206,884
1, 7		\$38,289			\$38,289
1, 2			\$12,200,000		\$12,200,000
10, 11	\$1,924,053	\$893,410			\$2,817,463
10, 9		\$1,531,561			\$1,531,561
11, 12	\$816,914	\$7,659			\$824,573
11, 13	\$1,010,002				\$1,010,002
13, 6		\$1,998,425			\$1,998,425
14, 2		\$2,630,326			\$2,630,326
2, 14	\$5,089,138	\$3,828	\$2,225,400	\$35,080,000	\$42,398,366
2, 3	\$2,859,000				\$2,859,000
2, 4, 5, 6, 7, 9				\$20,000,000	\$20,000,000

Summary of Past Bond Funding - by CW or Multiple Council District Projects					
Council District	2003 Bond	2006 Bond	2012 Bond	2017 Bond	Grand Total
2, 5, 9	\$500,000				\$500,000
2, 6	\$6,223,245	\$16,073,851			\$22,297,096
2, 7	\$1,577,539	\$2,751,065			\$4,328,604
2, 7, 14	\$1,925,909				\$1,925,909
2, 9, 14	\$636,000			\$1,100,000	\$1,736,000
3, 6	\$5,591,024	\$442,876			\$6,033,900
3, 7				\$13,200,000	\$13,200,000
3, 8	\$270,000				\$270,000
4, 5	\$5,672,267	\$406,757			\$6,079,024
4, 5, 7	\$9,346,130				\$9,346,130
4, 5, 8	\$165,001				\$165,001
4, 7	\$329,167				\$329,167
5, 8	\$10,000				\$10,000
5, 7, 8				\$13,980,000	\$13,980,000
5, 8	\$5,736,377	\$80,406	\$1,987,800		\$7,804,583
6, 11, 13	\$5,000,000				\$5,000,000
6, 13			\$690,000	\$3,300,000	\$3,990,000
6, 7, 9				\$543,000	\$543,000
7, 9		\$15,315			\$15,315
9, 10	\$32,000				\$32,000
9, 10, 11	\$5,000,000				\$5,000,000
9, 14	\$1,052,000		\$1,139,200		\$2,191,200
Multiple	\$1,637,862				\$1,637,862
Grand Total	\$65,748,512	\$36,209,630	\$18,717,000	\$113,903,000	\$234,578,142



Questions



- Questions?





City of Dallas

2024 Bond Update

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August 16, 2023**

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