

Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie
Subject: RE: Signed Letter of Agreement - City of Amarillo
Attachments: Baker Tilly Letter Agreement 1-25-24 fully executed.pdf

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Good morning, Stephanie!

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Edward

Edward G Williams, Ph.D.
Director



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January 17, 2024



Baker Tilly US, LLP
205 N. Michigan Avenue, 28th Floor
Chicago, IL 60601
United States of America

bakertilly.com

Ms. Stephanie Coggins, City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105

Dear Ms. Coggins:

This letter agreement (the "Agreement") documents City of Amarillo, Texas ("you/r" or "Client") engagement of Baker Tilly US, LLP ("we" or "Baker Tilly") to conduct a public sector executive recruitment for a City Manager (the "Project"). This Agreement defines our and your respective obligations for the Project.

Scope, Objectives and Approach

A team approach, which uses a combination of your personnel and ours, is critical to the success of the Project. Your organization and its team members bring the knowledge of your needs, and we bring a deep understanding of public sector executive recruitment and selection practices.

Phase	Professional Services Description
Phase I	<u>Task 1</u> – Develop the candidate profile and its related marketing, recruitment, and outreach campaign. <u>Task 2</u> – Accept, review, classify and correspond with prospective applicants.
Phase II	<u>Task 3</u> – Draft written questionnaire, one-way interview, and due diligence questionnaire, assign to qualified applicants who meet established or desired profile, then prepare, and submit a semifinal report to client. <u>Task 4</u> – Conduct reference, academic verifications, criminal and/or credit history check. report
Phase III	<u>Task 5</u> – Develop a final process, candidate rating, suggested interview questions. <u>Task 6</u> – Support the process of extending a job offer and negotiation as needed.
Conclusion	Finalist accepts clients offer.

Project Timing and Budget

The Project will commence upon your execution of this Agreement and will remain in effect for the period necessary for successful completion of the Project.

1. Dr. Edward G. Williams will lead the Project, and other professionals will be involved as required. The all-inclusive professional fee to complete the Project is \$36,382 (the "Fee") and includes the cost of professional services by the Project Team Leader and the project support staff, and all project-related expenses such as advertising, printing, candidate background and reference checks, and travel expenses for up to two on-site visits by the Project Team Leader. Travel expenses incurred by candidates for on-site interviews with the Client are not the responsibility of Baker Tilly and should be managed directly by the

CITY OF AMARILLO, TEXAS – CITY MANAGER – EXECUTIVE RECRUITMENT AGREEMENT

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Client. The Client will make payments upon receipt of an invoice submitted by Baker Tilly. Payment to Baker Tilly is due upon receipt. All invoices will be forwarded to the Client for processing unless otherwise directed. For reporting purposes, Baker Tilly's tax identification number is 39-0859910.

2. The Fee will be billed in four installments; 30% billed upon execution of this Letter; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and the final 10% upon acceptance of your offer by the candidate you select. The Fee is not contingent. This means that if you terminate this engagement before completion, Baker Tilly shall invoice you for any unpaid portion of the Fee.
3. If Client requests Baker Tilly to perform additional services beyond the services described above, such as conducting an employee/community survey or making additional on-site visits, such additional services shall result in additional fees. For an employee/community survey, the additional fee shall be \$2,450. For additional on-site visits (beyond the two days included in each search), the additional fee would be an hourly rate of \$350 plus expenses.
4. If client requests additional services, such as strategic planning, performance management, coaching, onboarding, benefits and compensation studies, employee management, etc., Baker Tilly will present the associated fee, for approval, prior to beginning said work.

Baker Tilly's Guarantees

1. Baker Tilly shall remain on the Project until you find a candidate to hire. If you are unable to select from the initial group of semifinalists or finalists, Baker Tilly will work to identify additional candidates for your selection.
2. We promise that if the candidate you select is terminated or resigns within 12 months of hire date, Baker Tilly will conduct an additional search at no additional professional fee but will invoice you for project-related expenses. Internal candidates selected from within your organization do not qualify for this guarantee. Except as stated above, Baker Tilly cannot guarantee the success of any candidate or guarantee that he or she shall perform to your expectations, as those things are beyond Baker Tilly's control.
3. Baker Tilly will not solicit the candidate you select for any other position while the candidate is employed by your organization.
4. When Baker Tilly obtains a criminal or credit history report on the candidates, Baker Tilly shall comply with the Fair Credit Reporting Act (the "FCRA") in obtaining the reports. Baker Tilly cannot guarantee the completeness or accuracy of the information in the reports.
5. In identifying and screening candidates, Baker Tilly will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law. Proactively, we shall make a good faith effort to include a diverse pool of qualified candidates in our search assignments.

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Client's Obligations

1. You agree that you are responsible for candidate selections and that you will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
2. If you decide to not hire a candidate as a result of a criminal or credit history report, you agree to comply with the FCRA with regard to any pre- or post-adverse action notices and requirements.
3. You agree to respond to drafts of documents and reports in a timely manner. Failure to do so on your part will protract timelines and can negatively influence the outcome of the process.

Management's Responsibilities

It is understood that Baker Tilly will serve in an advisory capacity with Client. The Client is responsible for management decisions and functions, and for designating an individual with suitable skill, knowledge, or experience to oversee the services we provide. The Client is responsible for evaluating the adequacy and results of the services performed and accepting responsibility for such services. The Client is responsible for establishing and maintaining internal controls, including monitoring ongoing activities.

The procedures we perform in our engagement will be heavily influenced by the representations that we receive from Client personnel. Accordingly, false representations could cause material errors to go undetected. The Client, therefore, agrees that Baker Tilly will have no liability in connection with claims based upon a failure to detect material errors resulting from false representations made to us by any Client personnel and our failure to provide an acceptable level of service due to those false representations.

The ability to provide services according to timelines established and at fees indicated will rely in part on receiving timely responses from the Client. The Client will provide information and responses to deliverables within the times established in this Agreement unless subsequently agreed otherwise in writing.

The responsibility for auditing the records of Client rests with the Client's separately retained auditor and the work performed by Baker Tilly shall not include an audit or review of the records or the expression of an opinion on financial data.

Terms and Conditions

1. To the extent allowed under applicable law, the aggregate liability (including attorney's fees and all other costs) of either party and its present or former partners, principals, agents or employees to the other party related to the services performed under this Agreement shall not exceed the fees paid to Baker Tilly under the portion of this Agreement to which the claim relates, except to the extent finally determined to have resulted from the gross negligence, willful misconduct or fraudulent behavior of the at-fault party. Additionally, in no event shall either party be liable for any lost profits, lost business opportunity, lost data, consequential, special, incidental, exemplary, or punitive damages, delays or interruptions arising out of or related to this Agreement even if the other party has been advised of the possibility of such damages.

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2. Each party recognizes and agrees that the warranty disclaimers and liability and remedy limitations in this Agreement are material bargained for bases of this Agreement and that they have been taken into account and reflected in determining the consideration to be given by each party under this Agreement and in the decision by each party to enter into this Agreement.
3. Neither this Agreement nor any rights or obligations hereunder shall be assigned or delegated by Baker Tilly without your prior written consent. This Agreement shall be modified only by a written agreement duly executed by you and Baker Tilly. Should any of the provisions hereunder be found to be invalid, void, or voidable by a court, the remaining provisions shall remain in full force and effect.
4. Copies of all hard copy documents associated with the recruitment will be retained for three (3) years from the anniversary date of the hiring of the candidate. Retention of records beyond three (3) years must be requested in writing before the conclusion of the Project.
5. Baker Tilly US, LLP is an independent member of Baker Tilly International. Baker Tilly International Limited is an English company. Baker Tilly International provides no professional services to clients. Each member firm is a separate and independent legal entity, and each describes itself as such. Baker Tilly US, LLP is not Baker Tilly International's agent and does not have the authority to bind Baker Tilly International or act on Baker Tilly International's behalf. None of Baker Tilly International, Baker Tilly US, LLP, nor any of the other member firms of Baker Tilly International has any liability for each other's acts or omissions. The name Baker Tilly and its associated logo is used under license from Baker Tilly International Limited.

If this Agreement correctly sets for your understanding, please sign below, and return one copy to us for our files. We look forward to collaborating with you on this important project.

Sincerely,



January 25, 2024

Anne Lewis, Managing Director

Client Acceptance and Signature:

Name: 

Title: Interim City Manager

Date: 1/25/24

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Coggins, Stephanie

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From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, January 31, 2024 9:55 AM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Happy Wednesday!

Edward

Edward G Williams
Director



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Sent: Wednesday, January 31, 2024 12:33 PM
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You don't often get email from karen.edwards@bakertilly.com. [Learn why this is important](#)

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Hi Edward,

Thank you for the introduction. I'm eager to collaborate with both of you on this recruitment.

Have a wonderful day!

Karen Edwards, SHRM-CP
Senior Recruitment Analyst



Baker Tilly US, LLP
T: +1 (813) 915-5616
8626 North Himes Avenue, Tampa, FL 33614
karen.edwards@bakertilly.com | bakertilly.com



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Sent: Monday, January 29, 2024 3:16 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Thank you for the agreement. I will work with appropriate departments to obtain the requested information and will plan to have it back to you this week, likely within 1-2 days for most of it.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

1. Organizational charts (titles only).

2. Current FY City of Amarillo budget.
3. # of City Employees FTEs? Part Time?
4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.
17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

Please upload the pictures securely by clicking the below link. Make sure to enter City of Amarillo "Company":

<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

ATTENTION ELECTED OFFICIALS: A "Reply to All" of this email could lead to violations of the Texas Open Meetings Act. Please reply only to the sender.

CONFIDENTIALITY: The information in this email is for the intended recipient only. If you have received this email in error, please Reply only to the sender and then delete this email. The information in this email and any attachment may be confidential or privileged. Any unauthorized use, disclosure, distribution, forwarding, or copying is strictly prohibited.

Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast.

BakerTilly US Confidentiality Notice: This message is being sent by BakerTilly US. It is intended exclusively for the individuals and entities to which it is addressed. This communication, including any attachments, may contain information that is proprietary, privileged, confidential, including information that is protected under the HIPAA privacy

rules, or otherwise legally exempt from disclosure. If you are not the named addressee, you are not authorized to read, print, retain, copy or disseminate this message or any part of it. If you have received this message in error, please notify the sender immediately by email and delete all copies of this message. This message is protected by applicable legal privileges and is confidential. Tax advice, if any, contained in this communication was not intended or written to be used by any taxpayer for the purpose of avoiding penalties.

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This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast.

Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, February 1, 2024 1:43 PM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: FW: 2024 City Manager Executive Recruitment Services - CONFIDENTIAL
Attachments: Amarillo, TX City Manager EXS Timeline FEB_JUN_2024.pdf

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Hi, Stephanie,

Below is an email I sent yesterday to the city council. My apologies for this oversight on my part. As discussed initially, I will copy you on all correspondence to the City Council.

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



Baker Tilly US, LLP, trading as Baker Tilly, is a member of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities.

From: Williams, Edward
Sent: Wednesday, January 31, 2024 4:29 PM
To: cole.stanley@amarillo.gov; josh.craft@amarillo.gov; Don Tipps <Don.Tipps@amarillo.gov>; tom.scherlen@amarillo.gov; Simpson, Les <Les.Simpson@amarillo.gov>
Subject: 2024 City Manager Executive Recruitment Services - CONFIDENTIAL

Mayor Stanley,
Councilmember Craft,
Councilmember Tipps,
Councilmember Scherlen,
Councilmember Simpson

This email, and any attachments, may constitute a public record of the City of Amarillo, and may be subject to public disclosure under the Texas Public Information Act.

**Please do not "reply all" to this e-mail as doing so could lead to violations of the Texas Open Meetings Act.
Please reply only to the sender.**

Below is an initial draft our city manager search process. This is merely a starting point to help guide our discussions and actions going forward. It is imperative to that you understand that I do not have an agenda; my agenda is your agenda. Therefore, you may edit, add, or delete any of the proposed steps to improve this process. Please take the time to read this correspondence in its entirety. I am excited and looking forward to our journey to identifying your next city manager.

Please let me know two potential dates and times that you can meet with me, individually for less than one hour (or more if necessary) to hear about your ideas, views, perspective, or concerns. We will also discuss your view on the desired traits, attributes, qualifications, leadership style, and management competence you desire your next city manager to possess.

Once I hear from you, individually, I will send Teams Meeting invitations or schedule telephone calls, whichever works best for you. Once we have gathered your individual input, we can finalize our recruitment action plan, review the search timeline, and determine the best path forward to ensure that we agree on a clear objective.

Below please find my contact information. Feel free to use as you deem necessary and appropriate. Please note that my work cell phone is only with during business hours.

❖ **My contact information:**

Edward G. Williams, PhD, Director

Baker Tilly US, LLP

Telephone: (214) 842.6478

Mobile: (214) 608.6363 *(I return all calls, or text left after business hours within 24 hours)*

Edward.williams@bakertilly.com

❖ **Draft Search Timeline** (Attached) – Please review and let me know if you have any concerns, suggested changes, edits, or revisions.

❖ **TTI Benchmark** (Recommended - Optional) <https://www.ttisurvey.com/458485AGB>

Target Training International, Ltd (TTI) is the world's leading source for research-based, validated assessment and coaching tools that enable organizations to meet established talent management needs, using patented solutions and products. We believe that TTI is an additional tool the City of Amarillo may use to evaluate its city manager candidates. As a council member or city executive familiar with the expectations, duties, responsibilities, and essential functions of the city manager, you may also be familiar with the challenges, opportunities, and responsibilities of leading an organization like the City of Amarillo, including managing programs, delivering services, planning projects, and implementing initiatives, we believe this tool could serve as an additional resource to help frame the ideal candidate profile.

Below is a link to the [TTI Benchmark Survey](https://www.ttisurvey.com/458485AGB). **Please complete the survey by midnight on Sunday, February 11, 2024, at 11:59 PM.**

Survey Link: <https://www.ttisurvey.com/458485AGB>

Please address each question in the survey as though you were having a conversation with the job. This tool focuses on the ideal temperament, attitudes, and requirements of the position and not who is currently, or previously, in the position. This is ideally your opinion of the skills, traits, and attributes the new city manager will need to bring to have on day one.

On average it takes about 45 minutes to complete this survey. You will need to complete the assessment in one sitting as you will not be able to save your place if you stop mid assessment. In other words, if you stop in the middle of the assessment, you will need to start from the beginning when you return.

This process involves three (3) important steps.

First, you and up to eight (8) other key individuals in the city complete the online survey.

Second, we combine the scores from each individual survey to create an organizational profile.

The third step involves asking the individuals you select as finalists to respond to a similar questionnaire focusing on their individual management styles, work-related values, and leadership competencies. We then compare the results to the profile you helped create and compare individual scores to the established profile.

❖ **Candidate Profile Questionnaire.** Please be prepared to answer the following questions during our one-on-one meeting.

1. What information about the City of Amarillo would you like to share with prospective applicants?
2. What information about the city government would you like to share?
3. What information about the City Manager's office, roles, responsibilities, expectations, do you believe is imperative to share with prospective applicants?
4. How would you best summarize the traits, attributes, and overall characteristics of your "ideal" next City Manager?
5. What level of education do you want the new City Manager to hold?
 BA/BS MA/MS JD, Ed. D., Ph. D, similar
 Required Desired Preferred?
6. What is your view of the salary and benefit the City of Amarillo should offer the new city manager? Market Competitive salary; Average Market; Market Range discussion...
Compensation Philosophy (council discussion)
7. Base Salary? Range? Housing allowance? Vehicle allowance? Cell phone allowance? Relocation?
8. What is the council's position on a multiyear employment agreement (contract) for the new City Manager? Years? Discussion
9. Market comparator, population rationale (population, similar service delivery, proximity to metro or larger city.)
City of Amarillo, TX - Population (202,249).

➔ Garland (244,026) ➔ Irving (254,962) Frisco (202,075) ➔ Grand Prairie (197,279) McKinney (196,160)

 City Manager/Administrator > 50,000 – 99,999 residents
 Assistant City Manager 100,000 – 149,999 residents
 Department Director 150,000 – 249,999 residents
 _____ 250,000 – 499,999 residents
 _____ 500,000 – or more
10. Certification or credentials?

 ICMA _____ Other _____
11. **DISC benchmark discussion?**
12. Search Scope: Nationwide State of Texas only
13. Years of related professional experience (Director, assistant city/county manager, or deputy)?
 Zero – 5 years? 6 – 9 years 10 – 15 years 16 – 19 years 20+ Years
14. Discuss your desired or anticipated mandates, goals, or priorities you would like the city manager to address or manage.
15. Residency requirement? Charter mandated? – Discussion.
16. How will the council measure the overall performance of the new city manager?
17. What challenges will the new city manager face?
18. What opportunities will the new city manager have?
19. What potentially controversial, ongoing, or otherwise sensitive issues, if any, will the city manager face?
20. What are the current, or future staffing issues, challenges, or opportunities the city manager will have?

21. Do you know of any public or community issues the city manager will more than likely face?

I am looking forward to working with you.

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
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CITY OF AMARILLO, TEXAS
City Manager
Public Sector Executive Recruitment Timeline

Updated: January 26, 2024

TASK	DELIVERABLES	TARGET DATE
Search Agreement	Baker Tilly (BT) presents service agreement, secures a fully executed agreement, or purchase order, schedules kickoff/profile development with appointing authorities or designee.	<i>January 25, 2024</i>
Project Kickoff/ Profile Development	Lead consultant meets with Appointing Authority or designee to develop candidate profile, project scope, and search timeline.	<i>February 1-16, 2024</i>
Community Survey	Amarillo City Council invites constituents to complete survey and publishes link on website, share link on social media.	<i>February 1, 2024</i>
Community Survey Close (optional)	Survey closes. Use input to develop the desired candidate profile	<i>February 29, 2024</i>
Develop & Approval of Recruitment Materials	Schedule meetings with individual stakeholders, develop profile, draft marketing, recruiting and outreach materials, secures client approval prior to launch.	<i>March 1 -15, 2024</i>
BT Launches Search	BT launches a national marketing, recruitment and outreach campaign posting announcement on target sites and outlets, direct mail, and outreach for 30 days	<i>March 18, 2024</i>
Application Review Begins	BT reviews and classifies all applications. Job Announcement remains posted, BT continues to accept applications, until client selects a finalist.	<i>April 15, 2024</i>
Written Questionnaire, Due Diligence, Hire Vue	Lead consultant develops and assigns Due Diligence (DD) and Candidate Questionnaire (CQ) to select applicants.	<i>April 16, 2024</i>
	Select applicants return DD and CQ	<i>April 22, 2024</i>
Semifinal Report	Baker Tilly emails Semifinal Report to client.	<i>April 25, 2024</i>
Background, References, media check and assessment	BT completes finalists' reference, leadership assessment, background, and academic verification checks - (10-15 business days)	<i>May 8, 2024</i>
Finalist Report	BT sends Final Report to the client	<i>May 9, 2024</i>
On Site Interviews	The Appointing Authority conducts on-site interviews with finalists and selects the top candidate.	<i>May 14, 2024, or May 15, 2024</i>
Client extends offer – finalist accepts*	- Client extends employment offer to a finalist.	<i>May 17, 2024</i>
	- Finalist accepts offer	<i>May 24, 2024</i>
	- Contract negotiations	<i>June 10, 2024,</i>
	- New City Manager begins	<i>or June 24, 2024*</i>
<i>Baker Tilly consultant is available to assist if requested.</i>		

Note: The above dates and tentative and pending discussion, agreement and approval from the city council or appointing authority.

* Start date may be contingent on the finalist's current employment status and availability. Two weeks' notice is reasonable. However, an individual selected may require a 30-day notice of intent to separate from service due to contractual obligations.

+ Appointing Authorities= City Council, City Manager, City Manager Designee, Commissioners, Boards, Department Director, or decision maker.

Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, February 1, 2024 2:34 PM
To: Williams, Edward
Cc: Edwards, Karen
Subject: RE: 2024 City Manager Executive Recruitment Services - CONFIDENTIAL

No problem, thank you for forwarding me.

I should be getting the last piece of information to fulfill your request from Friday shortly and will forward everything by end of business today. (The logo and images have already been uploaded through the provided link).

Thanks,
Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, February 1, 2024 1:43 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: FW: 2024 City Manager Executive Recruitment Services - CONFIDENTIAL

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Edward

Edward G Williams
Director



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edward.williams@bakertilly.com | bakertilly.com



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From: Williams, Edward
Sent: Wednesday, January 31, 2024 4:29 PM

To: cole.stanley@amarillo.gov; josh.craft@amarillo.gov; Don Tipps <Don.Tipps@amarillo.gov>; tom.scherlen@amarillo.gov; Simpson, Les <Les.Simpson@amarillo.gov>

Subject: 2024 City Manager Executive Recruitment Services - CONFIDENTIAL

Mayor Stanley,
Councilmember Craft,
Councilmember Tipps,
Councilmember Scherlen,
Councilmember Simpson

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❖ **My contact information:**

Edward G. Williams, PhD, Director

Baker Tilly US, LLP

Telephone: (214) 842.6478

Mobile: (214) 608.6363 (I return all calls, or text left after business hours within 24 hours)

Edward.williams@bakertilly.com

❖ **Draft Search Timeline** (Attached) – Please review and let me know if you have any concerns, suggested changes, edits, or revisions.

❖ **TTI Benchmark** (Recommended - Optional) <https://www.ttisurvey.com/458485AGB>

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Survey Link: <https://www.ttisurvey.com/458485AGB>

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7. Base Salary? Range? Housing allowance? Vehicle allowance? Cell phone allowance? Relocation?
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City of Amarillo, TX - Population (202,249).

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- | | |
|---|--|
| <input type="checkbox"/> City Manager/Administrator | <input type="checkbox"/> > 50,000 – 99,999 residents |
| <input type="checkbox"/> Assistant City Manager | <input type="checkbox"/> 100,000 – 149,999 residents |
| <input type="checkbox"/> Department Director | <input type="checkbox"/> 150,000 – 249,999 residents |
| <input type="checkbox"/> _____ | <input type="checkbox"/> 250,000 – 499,999 residents |
| <input type="checkbox"/> _____ | <input type="checkbox"/> 500,000 – or more |

10. Certification or credentials?

- ICMA _____ Other _____

11. DISC benchmark discussion?
12. Search Scope: Nationwide State of Texas only
13. Years of related professional experience (Director, assistant city/county manager, or deputy)?
 Zero – 5 years? 6 – 9 years 10 – 15 years 16 – 19 years 20+ Years
14. Discuss your desired or anticipated mandates, goals, or priorities you would like the city manager to address or manage.
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21. Do you know of any public or community issues the city manager will more than likely face?

I am looking forward to working with you.

Edward

Edward G Williams, Ph.D.
Director



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edward.williams@bakertilly.com | bakertilly.com



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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, February 1, 2024 2:48 PM
To: Williams, Edward
Cc: Edwards, Karen
Subject: RE: Signed Letter of Agreement - City of Amarillo
Attachments: Information Requested by Baker Tilley.docx; 7. City Manager Job Description.docx; 11. Jared H Miller (Jared Miller) executed January 2017.PDF; 11. Jared H Miller_ Jared Miller executed April 2023.PDF; 12. 2024 benefits guide.pdf; 11. Atkinson Jarrett executed May 2012.PDF

Here is almost everything – I owe you #5, but I didn't want to delay getting the bulk of this back to you.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, January 31, 2024 9:55 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

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Good morning, Stephanie!

My colleague Karen Edwards will also manage this project and will ensure that I stay on target once we get started. Looking forward to working with you both.

Happy Wednesday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
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2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Monday, January 29, 2024 3:16 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Thank you for the agreement. I will work with appropriate departments to obtain the requested information and will plan to have it back to you this week, likely within 1-2 days for most of it.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

1. Organizational charts (titles only).
2. Current FY City of Amarillo budget.
3. # of City Employees FTEs? Part Time?
4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.

6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.
17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

Please upload the pictures securely by clicking the below link. Make sure to enter City of Amarillo "Company":

<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



Baker Tilly US, LLP, trading as Baker Tilly, is a member of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities.

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

ATTENTION ELECTED OFFICIALS: *A "Reply to All" of this email could lead to violations of the Texas Open Meetings Act. Please reply only to the sender.*

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Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast.

1
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BAKER TILLEY INFORMATION REQUESTED 1/26/24

1. Organizational charts (titles only).

<https://www.amarillo.gov/home/showdocument?id=36222&t=638372900226254313>

2. Current FY City of Amarillo budget.

The final proposed Budget totals approximately \$531.0 million, with \$336.4 million approved for operation and maintenance functions, \$135.5 million in capital, and \$59.2 million for required debt service payments.

<https://www.amarillo.gov/home/showdocument?id=35927&t=638307256083189056>

3. # of City Employees FTEs? Part Time?

2,326 permanent and 355 part-time budgeted positions

4. # of City of Amarillo employees represented by unions, if applicable

Police and Fire are represented by associations – not full unions. Meet and Confer agreements are in place for each agency. Budgeted personnel for Police are 380 and for Fire are 295. Please note that not all of these employees are members of the respective Police and Fire associations. If you need specific membership counts, please let me know.

5. City credit rating.

Information forthcoming

6. Official City population?

200,393 per 2020 Census

<https://www.census.gov/quickfacts/fact/table/amarillocitytexas/PST045223>

7. City Manager job description.

Document attached.

8. # of FTE's reporting to the City Manager.

Under the current structure, we would anticipate 6-8 direct reports.

9. City Manager's FY2024 budget?

\$2,157,651 (FY2023-24)

10. City Manager salary range and anticipated base salary.

We do not have an established range – it will be at the consensus of City Council. For this, we would like for Baker Tilley to provide some recommendations to City Council on the salary range based on market research for comparable cities. Our last city manager's base salary was \$313,000.

11. Current and prior city manager employment agreement?

BAKER TILLEY INFORMATION REQUESTED 1/26/24

Documents attached.

12. City Manager Benefits.

Document attached.

13. Will the City reimburse candidates for expenses related to in-person interviews?

Yes

14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?

Negotiable, yes

15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)

Standard pre-employment processes include a drug screen and background check.

Residency requirement: We do not have any residency requirements per the Amarillo City Charter. If Council gives consensus on requiring the selected applicant to reside in Amarillo, it will need to be addressed through the employment agreement.

Indebtedness check: Per Amarillo City Charter Art. V, Sec. 4: "The Mayor, Councilmembers and other officers and employees shall not be indebted to the City; shall not hold any other public office of emolument and shall not be interested in the profits or emolument of any contracts, job, work or service for the municipality, or interested in the sale to the City of any supplies, equipment, material or articles purchased."

Vehicle allowance and phone allowance available - negotiable

16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.

Images have been submitted to the link provided.

17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

Images have been submitted to the link provided.



JOB TITLE: City Manager
JOB CLASS NUMBER:
PAY GRADE: Contract
FLSA STATUS: Exempt
BUSINESS UNIT NAME: Office of the City Manager
REPORTS TO: Mayor and City Council
SUPERVISORY WORK: Supervises

SUMMARY

This position directs and coordinates the administration of City government in accordance with policies determined by the Mayor and City Council by performing duties personally and through Division Directors.

ESSENTIAL RESPONSIBILITIES

- Appoints Division Directors and staff as provided by State laws or local ordinances.
- Supervises activities of divisions performing functions such as collection and disbursement of taxes, law enforcement, maintenance of public health, construction of public works and purchase of supplies and equipment.
- Prepares annual budget and submits estimates to authorized elected officials for approval.
- Plans for future development to provide for population growth and expansion of public services.
- Recommends zoning regulation controlling location and development of residential and commercial properties
- Directly manages a Deputy City Manager, Assistant City Managers, and some Department Directors, who ultimately supervise 2,300 employee workforce.
- Oversees the overall direction, coordination, and evaluation of the departments.
- Carries out supervisory responsibilities in accordance with the City Charter, policies and applicable laws.
- Performs other supervisory duties, including interviewing and hiring directors; planning, assigning and directing work; appraising performance, rewarding and disciplining employees; addressing complaints and resolving problems.
- Synthesizes complex or diverse information, collecting and researching data, using intuition and experience to complement data and designing work flows and procedures.
- Generates creative images, using feedback to modify designs and demonstrating attention to detail.
- Identifies and resolves problems in a timely manner, gathering and analyzing information skillfully, developing alternative solutions, working well in group problem solving situations and using reason even when dealing with emotional topics.
- Develop project plans, coordinating projects, communicating changes and progress, completing projects on time and budget and managing project team activities.
- Assesses own strengths and weaknesses, pursuing training and development opportunities, striving to continuously build knowledge and skills and sharing expertise with others.
- Manages difficult or emotional customer situations, responding promptly to customer needs, soliciting customer feedback to improve service, responding to requests for service and assistance and meeting commitments.
- Focuses on solving conflict, not blaming, maintaining confidentiality, listening to others without interrupting, keeping emotions under control, remaining open to others' ideas and trying new things.
- Speaks clearly and persuasively in positive or negative situations, listening and getting clarification, responding well to questions, demonstrating group presentation skills and participating in meetings.
- Writes clearly and informatively, varying writing style to meet needs, presenting numerical data effectively and reading and interpreting written information.
- Balances team and individual responsibilities, exhibiting objectivity and openness to others' views; giving

and welcoming feedback, building morale and group commitments to goals and objectives and supporting everyone's efforts to succeed.

- Displays passion and optimism, inspiring respect and trust, mobilizing others to fulfill the vision, providing vision and inspiration to peers and subordinates.
- Develops workable implementation plans, communicating changes effectively, building commitment, overcoming resistance, monitoring transition and evaluating results.
- Performs other job-related duties as assigned.

MINIMUM REQUIREMENTS

A Bachelor's degree from an accredited college or university with major course work in public administration, business administration, economics, or related field. A Master's degree is highly desirable. Ten years of progressively responsible experience in municipal government including five years as a department head or Assistant City Manager.

KNOWLEDGE, SKILLS, AND ABILITIES

- Ability to synthesize complex or diverse information, collecting and researching data, using intuition and experience to complement data and designing work flows and procedures.
- Ability to generate creative images, using feedback to modify designs and demonstrating attention to detail.
- Ability to identify and resolve problems in a timely manner, gathering and analyzing information skillfully, developing alternative solutions, working well in group problem solving situations and using reason even when dealing with emotional topics.
- Ability to develop project plans, coordinating projects, communicating changes and progress, completing projects on time and budget and managing project team activities.
- Ability to assess own strengths and weaknesses, pursuing training and development opportunities, striving to continuously build knowledge and skills and sharing expertise with others.
- Ability to manage difficult or emotional customer situations, responding promptly to customer needs, soliciting customer feedback to improve service, responding to requests for service and assistance and meeting commitments.
- Ability to focus on solving conflict, not blaming, maintaining confidentiality, listening to others without interrupting, keeping emotions under control, remaining open to others' ideas and trying new things.
- Ability to speak clearly and persuasively in positive or negative situations, listening and getting clarification, responding well to questions, demonstrating group presentation skills and participating in meetings.
- Ability to write clearly and informatively, varying writing style to meet needs, presenting numerical data effectively and reading and interpreting written information.
- Ability to balance team and individual responsibilities, exhibiting objectivity and openness to others' views; giving and welcoming feedback, building morale and group commitments to goals and objectives and supporting everyone's efforts to succeed.
- Ability to display passion and optimism, inspiring respect and trust, mobilizing others to fulfill the vision, providing vision and inspiration to peers and subordinates.
- Ability to develop workable implementation plans, communicating changes effectively, building commitment, overcoming resistance, monitoring transition and evaluating results. Mathematical skills and attention to details a must.
- Working knowledge of purchasing principles, methods, and procedures preferred.
- Must have ability to organize and present oral and written reports.
- Knowledge and experience with computers required.
- Ability to work harmoniously and cooperatively with other employees and to deal with vendors tactfully.
- Knowledge of various library equipment and furniture to make small repairs or describe to servicemen what repairs are needed.
- Ability to type from clear copy at the rate of not less than 30 words per minute.
- Ability to operate computers for data entry and word processing.
- Strong verbal and written communication skill.

- Ability to operate small office equipment, including computers, typewriters, telephones, calculators, photocopy machines, microform readers and barcode readers.

ADA PROFILE

Reasonable accommodation will be made to enable individuals with disabilities to perform the essential functions of this position. While performing the duties of this job, the employee is regularly required to exert up to 20 pounds of force occasionally, and/or up to 10 pounds of force to move objects. The employee must also balance, climb, crawl, crouch, walk, stand, kneel, stoop, sit, hear, feel, finger, grasp, handle, reach, pull, push, speak, see, and talk. Also requires the ability to make rational decisions and perform repetitive motions.

WORK ENVIRONMENT

The employee works in a safe and secure indoor work environment that may periodically have unpredicted requirements or demands.

APPROVALS

Incumbent:	_____	Date:	_____
Supervisor:	_____	Date:	_____
Department Head:	_____	Date:	_____
Division Director:	_____	Date:	_____
HR Director:	_____	Date:	_____

EFFECTIVE DATE:	7/1/04
DATES MODIFIED:	3/16, 7/8/16, 01/31/24

STATE OF TEXAS)
COUNTY OF RANDALL)
COUNTY OF POTTER)

EMPLOYMENT AGREEMENT

This Agreement is by and between the City of Amarillo, Texas, acting by and through its City Council ("Employer") and Jared H. Miller, ("Manager"). The parties agree as follows:

1. Purpose.

The purpose of this Agreement is to set forth the expectations of and benefits to be provided to Jared H. Miller while he serves as City Manager of the City of Amarillo.

2. Term.

This Agreement is for an indefinite term of employment. It does not create and shall not be construed as creating an agreement to employ for any specific period of time. The parties agree that this Agreement does not alter the at-will status of the Manager's employment. The provisions of this agreement, as may be amended, apply for the duration of Mr. Jared H. Miller's employment.

3. Duties and Authority.

Employer agrees to employ Jared H. Miller as City Manager to perform all customary and usual functions and duties of the position of City Manager, including but not limited to those specified by state law; City Charter; any applicable City ordinances, resolutions, and policies; and such other duties as may be prescribed by the City Council from time to time. Subject to the direction of the majority of the City Council, the City Manager shall have full administrative and managerial control over the daily operations of the municipal organization, including personnel, equipment, facilities, and programs.

4. Compensation & Benefits.

Employer agrees to pay Manager an initial annual base salary of Two Hundred Thirty Thousand and no/100 Dollars (\$230,000.00), payable in installments at the same time that the other city employees are paid. This Agreement is deemed to be automatically amended to reflect any salary adjustments that are provided by the Employer. Compensation shall be reviewed on an annual basis.

In addition to salary, the following benefits will be paid by the Employer to the Manager. Where a benefit is stated as an annual sum, it shall be paid in installments at the same time each salary payment is made, unless otherwise agreed by manager and Employer.

A. Deferred Compensation.

A. The Employer agrees to deposit in its 457 Plan an amount equal to six percent (6%) of Employee's base salary to the 457 Plan on the employee's behalf on a pay period basis. The Manager is solely responsible for investment decisions under the 457 Plan, fees, taxes, losses and gains as may arise from participation in such Plan.

B. Automobile Allowance. The Employer agrees to pay the Manager the annual sum of Nine Thousand Six Hundred and no/100 Dollars (\$9,600.00), as such may be amended in the future by the Employer to be used to purchase, lease, or own a personal vehicle that may

also be used for business purposes. The Manager is responsible for paying for liability, property damage, and comprehensive insurance coverage on such vehicle and shall further be responsible for all costs attendant to purchase, operation, maintenance, repair, and replacement of such vehicle.

C. Communication Stipend. The Employer agrees to pay the Manager a communications stipend in the amount of Nine Hundred and no/100 (\$900.00) per year, payable at the same time and in the same manner as such stipend is paid to employees, in order to purchase, lease, or own a personal cell phone that may also be used for business purposes. Such phone must be capable of full data services, including but not limited to internet and email access.

D. TMRS Contributions. The Employer agrees to execute all necessary agreements provided by the Texas Municipal Retirement System for the City's participation in said retirement plan, and in addition to the base salary paid by the Employer to the Manager, the Employer agrees to pay the full contribution, not to exceed twenty-one (21%) percent of Employee's salary into the system on Employee's behalf, in equal proportionate amounts each pay period, and to transfer ownership to succeeding employers upon Employee's resignation or discharge.

5. Business Expenses. The Finance Director is authorized to pay the following expenses in advance or to reimburse Manager for such expenses, upon receiving duly executed receipts, vouchers, statements, or personal affidavit. Employer agrees to budget for and to pay:

(1) Professional dues and subscriptions of the Manager necessary for his continuation and participation in national, state, regional, and local associations and organizations necessary and desirable for the Manager's continued professional growth and for the good of the Employer.

(2) Reasonable and necessary costs of travel and subsistence expenses of the Manager for professional and official travel for City-related business, meetings, official functions, seminars, conventions, and the like.

(3) Reasonable and necessary costs of general expenses of a non-personal but job related nature incurred by Manager in furtherance of Employer's business.

(4) Employer acknowledges the value it receives by having Manager participate and be directly involved in the activities described above, as well as participation in local civic clubs. Accordingly, Employer shall also pay for reasonable membership dues for Manager to become an active member in local clubs or organizations, as and to the extent the Manager may desire.

5. **Other Benefits.**

A. Manager shall be entitled to all benefits accorded to other City employees, including but not limited to, vacation, sick leave, and others. The City agrees to provide hospitalization, surgical, dental, life and comprehensive medical insurance as accorded to other City employees for Employee and his dependents, and to pay the full amount of premiums thereon.

B. To the extent allowed by law, the Employer shall provide both a defense and indemnity to the Manager against all claims, suits, demands, causes of action, attorney fees, penalties, fines, and interest that arise out of or relate to the Manager's performance of this Agreement (whether by act or omission) in his official capacity; provided however, that grossly negligent, knowingly and intentional, or criminal misconduct is excluded.

C. Upon commencing Employment, Employee shall be provided and credited with ten (10) days of vacation and ten (10) days of sick leave, which shall be immediately available for use by Employee.

D. Relocation Expenses. The Employer will also provide reimbursement to Employee, upon verification of actual expense, of up to \$10,000.00 to cover the cost of household goods movement to Employee's new principal physical residence in Amarillo. The Employer will provide temporary housing allowance of up to \$2,000.00 per month for a maximum of two (2) months. If Employee relocates to his principal physical residence in Amarillo prior to the expiration of two (2) months, the allowance will be paid only through the month of relocation.

E. Work Hours and Outside Employment.

It is recognized that the Manager must devote a great deal of time outside the normal office hours on City business and, to that end:

- a. Manager shall be allowed to establish an appropriate work schedule.
- b. The employment provided for by this Agreement shall be the Manager's sole employment unless otherwise approved by the City Council.

F. Other Terms & Conditions.

The Employer may fix other terms and conditions of employment as it may determine from time to time, relating to performance of Manager that are not inconsistent with this Agreement.

G. Evaluation.

At or near the Manager's annual anniversary, the City Council and Manager shall meet in a closed meeting (to the extent allowed by law) for the purpose of evaluating the performance of the Manager. Such evaluation may be oral or written.

H. Termination.

1. Termination without Cause: The City may terminate this Agreement at any time without cause. For the purpose of this agreement, termination shall occur when:

- a. The majority of the governing body votes to terminate the Employee at a duly authorized public meeting;
- b. The City reduces the base salary, compensation or any other financial benefit of the Employee, unless it is applied in no greater percentage than the average reduction of all department heads;

2. **Termination for Cause:** The City may terminate the Employee for cause. Such termination shall require the majority vote of the City Council and shall be preceded by notice to Employee. For purposes of this Agreement, "cause" shall include, without limitation, the following:
 - a. Misconduct in connection with the performance of any of Employee's duties, including, without limitation, misappropriation of funds or property of the City, securing or attempting to secure any personal profit or commercial advantage in connection with any transaction entered into by the City, any falsification or misrepresentation of fact, or any violation of law or regulation to which the City is subject;
 - b. Conviction of a felony offense, or of a misdemeanor involving moral turpitude, whether committed within or outside the scope of Employee's employment hereunder.
3. **Notice to the Employee of proposed termination:** Employee shall be given written notice of the Council's intent to terminate Employee and the date of a hearing to be conducted in an executive session of the Council at least ten (10) calendar days prior to such hearing and termination. Employee shall be given the opportunity to present evidence at the hearing in response to such proposed termination. Employee's failure to appear at such hearing does not prohibit the Council from taking action to terminate Employee. Employee shall have the option to request a public hearing.
4. **Resignation by Employee.** In the event Employee voluntarily resigns his position with the City during the term of this Agreement, then Employee shall give the City 30 days' notice in advance, unless the parties agree otherwise in writing.

I. Severance.

Severance shall be paid only as follows:

1. **Termination without cause:**
 - a. The City will pay Employee a lump sum cash payment for all base salary earned, earned unused vacation (the same as general City employees), earned unused sick leave (the same as general City employees), and other benefits that were earned but unused as of the last day of active employment.
 - b. The City will pay the Employee a lump sum cash payment equal to nine (9) months base salary. Thirty days (30) of severance will accrue following the completion of each successive year of employment, up to a maximum severance payment of twelve (12) months.
2. **Termination for cause:** In the event Employee is terminated for cause as defined in this document, the City shall have no obligation to pay the severance pay and severance benefits designated in this Agreement.
3. **Resignation by Employee:** The City will pay Employee a lump sum cash payment for all salary earned, earned unused vacation (the same as general City employees), earned unused sick leave (the same as general City employees), and other benefits that were earned but unused as of the last day of active employment.

4. Any severance payment made, whether compulsory or voluntary under this Agreement, shall be conditioned upon both Manager and Employer signing a mutual full release of claims against the other.

11. General Provisions.

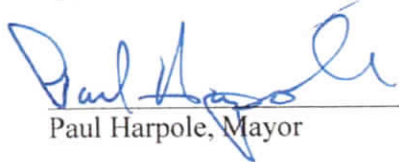
This Agreement sets forth the entire understanding between the Employer and Manager relating to the employment of the Manager by Employer. Any prior discussions or representations by or between the parties are merged into and rendered null by this Agreement. The parties may amend this Agreement by mutual agreement in writing. This Agreement is intended to be binding on Employer and Manager and their assigns, successors, heirs, executors, and beneficiaries. The invalidity or partial invalidity of this Agreement shall not affect the validity of the remainder of the Agreement, and such remainder shall be deemed to be in full force and effect as if they had been separately executed by the parties.

12. Effective Date.

This Agreement shall be effective upon the first day of Manager's service hereunder, which shall be on or before February 20, 2017.

The parties have executed this Agreement on this _____ day of January 2017.

CITY OF AMARILLO



Paul Harpole, Mayor

CITY MANAGER




Jared H. Miller

ATTEST:

Frances Hibbs, City Secretary

APPROVED AS TO FORM:



William M. McKamie, City Attorney

STATE OF TEXAS
COUNTY OF RANDALL
COUNTY OF POTTER

EMPLOYMENT AGREEMENT

This Agreement is by and between the City of Amarillo, Texas, acting by and through its City Council ("Employer" or "the City") and Jared H. Miller, ("Manager" or "Employee"). The parties agree as follows:

1. Purpose.

The purpose of this Agreement is to set forth the expectations of and benefits to be provided to Jared H. Miller while he serves as City Manager of the City of Amarillo.

2. Term.

This Agreement is for an indefinite term of employment. It does not create and shall not be construed as creating an agreement to employ for any specific period of time. The parties agree that this Agreement does not alter the at-will status of the Manager's employment. The provisions of this agreement, as may be amended, apply for the duration of Mr. Jared H. Miller's employment.

3. Duties and Authority.

Employer agrees to employ Jared H. Miller as City Manager to perform all customary and usual functions and duties of the position of City Manager, including but not limited to those specified by state law; City Charter; any applicable City ordinances, resolutions, Governance and Ends policy and any other duly adopted policies of City Council; and other such other duties as may be prescribed by the City Council from time to time. Subject to the direction of the majority of the City Council, the City Manager shall have full administrative and managerial control over the daily operations of the municipal organization, including personnel, equipment, facilities, and programs.

4. Compensation & Benefits.

Employer agrees to pay Manager an annual base salary of Three Hundred Thirteen Thousand and no/100 Dollars (\$313,000.00), payable in installments at the same time that the other city employees are paid. Employer may not reduce the annual base salary during the term unless it is applied in no greater percentage than the average reduction of all department heads. This Agreement is deemed to be automatically amended to reflect any salary adjustments that are provided by the Employer. Compensation shall be reviewed on an annual basis.

In addition to salary, the following benefits will be paid by the Employer to the Manager. Where a benefit is stated as an annual sum, it shall be paid in installments at the same time each salary payment is made, unless otherwise agreed by manager and Employer.

- a. **Deferred Compensation.** The Employer agrees to deposit in its 457 Plan an amount equal to ten percent (10%) of Employee's base salary to the 457 Plan or the maximum annual amount (including catch up provisions based on Manager's age) allowed by the IRS, whichever is greater, on the employee's behalf on a pay period basis. The Manager is solely responsible for investment decisions under the 457 Plan, fees, taxes, losses and gains as may arise from participation in such Plan.
- b. **Automobile Allowance.** The Employer agrees to pay the Manager the annual sum of Twelve Thousand and no/100 Dollars (\$12,000.00), as such may be amended in the future by the Employer to be used to purchase, lease, or own a personal vehicle that may also be used for business purposes. The Manager is responsible for paying for liability, property damage, and comprehensive insurance coverage on such vehicle and shall further be responsible for all costs attendant to purchase, operation, maintenance, repair, and replacement of such vehicle.
- c. **Communication Stipend.** The Employer agrees to pay the Manager a communications stipend in the amount of Nine Hundred and no/100 (\$900.00) per year, payable at the same time and in the same manner as such stipend is paid to employees, in order to purchase, lease, or own a personal cell phone that may also be used for business purposes. Such phone must be capable of full data services, including but not limited to internet and email access.
- d. **TMRS Contributions.** The Employer agrees to execute all necessary agreements provided by the Texas Municipal Retirement System for the City's participation in said retirement plan, and in addition to the base salary paid by the Employer to the Manager, the Employer agrees to pay the full contribution, not to exceed twenty-one (21%) percent of Employee's salary into the system on Employee's behalf, in equal proportionate amounts each pay period, and to transfer ownership to succeeding employers upon Employee's resignation or discharge.
- e. **Business Expenses.** The Finance Director is authorized to pay the following expenses in advance or to reimburse Manager for such expenses, upon receiving duly executed receipts, vouchers, statements, or personal affidavit. Employer agrees to budget for and to pay:
 - i. Professional dues and subscriptions of the Manager necessary for his continuation and participation in national, state, regional, and local associations and organizations necessary and desirable for the Manager's continued professional growth and for the good of the Employer.
 - ii. Reasonable and necessary costs of travel and subsistence expenses of the Manager for professional and official travel for City-related business, meetings, official functions, seminars, conventions, and the like.
 - iii. Reasonable and necessary costs of general expenses of a non-personal but job related nature incurred by Manager in furtherance of Employer's business.
 - iv. Employer acknowledges the value it receives by having Manager participate and be directly involved in the activities described above, as well as participation in local civic clubs. Accordingly, Employer shall also pay for reasonable membership dues for Manager to become an active member in local clubs or organizations, as and to the extent the Manager may desire.
- f. **Other Benefits.**
 - i. Manager at a minimum shall be entitled to all benefits accorded to other City employees, including but not limited to, vacation, sick leave, and others. The City agrees to provide hospitalization, surgical, dental, life and comprehensive

medical insurance as accorded to other City employees for Employee and his dependents, and to pay the full amount of premiums thereon.

- ii. To the extent allowed by law, the Employer shall provide both a defense and indemnity to the Manager against all claims, suits, demands, causes of action, attorney fees, penalties, fines, and interest that arise out of or relate to the Manager's performance of this Agreement (whether by act or omission) in his official capacity; provided however, that grossly negligent, knowingly and intentional, or criminal misconduct is excluded.
- iii. Employee shall be provided and credited with a minimum of twenty-five (25) days of vacation or the amount of vacation provided to another management employee based on his tenure as a city manager in any municipality (since 2003), whichever is greater and twelve (12) days of sick leave, which shall be immediately available for use by Employee upon the execution of this agreement and every anniversary date thereafter.
- iv. Life Insurance. The Employer will also provide reimbursement to Employee, upon verification of actual expense, of all premiums for a 20-year guaranteed level premium term life insurance policy with a value of \$3,000,000.00 insuring Manager's life, to care for his family in the event that he dies during his tenure as Manager. The policy shall be owned by Employee and Employee shall be entitled to retain the insurance at his own cost after termination, subject to the provisions of the severance provisions herein.

5. Work Hours and Outside Employment.

It is recognized that the Manager must devote a great deal of time outside the normal office hours on City business and, to that end:

- a. Manager shall be allowed to establish an appropriate work schedule.
- b. The employment provided for by this Agreement shall be the Manager's sole employment unless otherwise approved by the City Council.
- c. The City Council acknowledges and supports Manager's role as a recognized expert providing training on municipal issues to groups like the Texas City Management Association, the Texas Fire Chiefs Academy, Certified Public Manager training, and others. Nothing in this Agreement is intended to prevent Manager from continuing to provide expertise and leadership without compensation to groups like these, even if performed during work hours.

6. Other Terms & Conditions.

At the Employer's expense, the Employee will engage and participate in a mentor-based program designed to enhance life-long learning and professional development related to city managerial functions. Biannually, the Employee shall present to the City Council a report on his learning from the program and how it relates to city managerial functions.

The Employer may fix other terms and conditions of employment as it may determine from time to time, relating to performance of Manager that are not inconsistent with this Agreement.

7. Evaluation.

At or near the Manager's annual anniversary, the City Council and Manager shall meet in a closed meeting (to the extent allowed by law) for the purpose of evaluating the performance of the Manager. Such evaluation may be oral or written.

8. Termination.

- a. Termination without Cause: The City may terminate this Agreement without cause with ninety (90) days written notice to Employee. For the purpose of this agreement, termination without cause shall occur only when:
 - i. Eighty percent (80%) of the duly elected and qualified members of the City Council vote to terminate the Employee at a duly authorized public meeting and then provides the Employee the required 90 days written notice; or
 - ii. The death or disability of Employee. The 90 days written notice shall be waived in the event of the death or disability of Employee, but either occurrence will be treated as termination without cause. Disability shall be defined as the inability, due to physical or mental incapacity as determined by a certified physician of the City's choosing, of Employee to perform the essential functions of the Manager's job, with or without reasonable accommodation, for one hundred eighty (180) days out of any three hundred sixty-five (365) day period or as a condition for which Employee is receiving long-term disability benefits under the Employer's long-term disability plan.
- b. Termination for Cause: The City may terminate the Employee for cause. Termination of the Employee's employment shall not be deemed to be "for Cause" unless and until the Employer delivers to the Manager a copy of a resolution duly adopted by the affirmative vote of not less than sixty percent (60%) of the duly elected and qualified members of the City Council. Such affirmative vote and resolution may only occur after written notice as set forth below is provided to the Manager and the Manager is given an opportunity, together with counsel, to be heard before the City Council, finding that the Employee has engaged in the conduct described below. For purposes of this Agreement, "cause" shall include only the following:
 - i. Willful failure of Employee to perform Employee's duties (other than any such failure resulting from incapacity due to physical or mental illness as determined by a certified physician of the City's choosing), defined only as willful misappropriation of funds or property of the City, willful securing or attempting to secure any personal profit or commercial advantage in connection with any transaction entered into by the City, any willful falsification or misrepresentation of fact, or any material violation of law or regulation to which the City is subject. For purposes of this provision, no act or failure to act on the part of the Manager shall be considered "willful" unless it is done, or omitted to be done, by the Manager in bad faith or without reasonable belief that the Manager's action or omission was in the best interests of the City. Any act, or failure to act, based on authority given pursuant to a resolution or ordinance duly adopted by the City Council or on the advice of counsel for the City shall be conclusively presumed to be done, or omitted to be done, by the Manager in good faith and in the best interests of the City, but that definition is not all-inclusive of which acts may be performed in the best interests of the City;
 - ii. Conviction of a felony offense or a crime of moral turpitude involving dishonesty, fraud, theft, official oppression, abuse of office, or violence, whether committed within or outside the scope of Employee's employment

hereunder. Employer may suspend Employee with pay between indictment and conviction, but may not terminate for cause without an actual conviction of Employee.

- c. Required Notice for Termination with Cause: Employee shall be given written notice of the Council's intent to terminate Employee and the date of a hearing to be conducted in an executive session of the Council at least twenty (20) calendar days prior to such hearing and termination. Employee shall be given the opportunity to present evidence at the hearing in response to such proposed termination. Employee's failure to appear at such hearing does not prohibit the Council from taking action to terminate Employee. Employee shall have the option to request a public hearing.
- d. Resignation by Employee. In the event Employee voluntarily resigns his position with the City during the term of this Agreement, then Employee shall give the City ninety (90) days' written notice in advance, unless the parties agree otherwise in writing.

9. Severance. Severance shall be paid only as follows:

- a. Termination without cause:
 - i. The City will pay Employee a lump sum cash payment for all total compensation earned, all earned unused vacation, all earned unused sick leave, and other benefits that were earned but unused as of the last day of active employment.
 - ii. The City will additionally pay the Employee a lump sum cash payment equal to eighteen (18) months' total compensation. Such payment will be made to Employee in full within 20 days of the last day of active employment.
 - iii. If the Manager timely and properly elects health continuation coverage under the Consolidated Omnibus Budget Reconciliation Act of 1985 ("COBRA"), the Employer shall reimburse the Manager for the monthly COBRA premium paid by the Manager for the Manager and the Manager's dependents. Such reimbursement shall be paid to the Manager on the 5th of the month immediately following the month in which the Manager timely remits the premium payment. The Manager shall be eligible to receive such reimbursement until the earliest of:
 - 1. the eighteen-month anniversary of the last day of active employment;
 - 2. the date the Manager is no longer eligible to receive COBRA continuation coverage; or
 - 3. the date on which the Manager receives substantially similar coverage from another employer or other source.
- b. Termination for cause: In the event Employee is terminated for cause as defined in this document, the City shall have no obligation to pay the severance pay designated in this Agreement. The City shall pay Employee within 20 days all compensation and earned but unused benefits, including all unused vacation and sick leave, earned through the last day of active employment.
- c. Resignation by Employee: The City will pay Employee within 20 days a lump sum cash payment for all compensation earned through the last day of employment, earned unused vacation, earned unused sick leave, and other benefits that were earned but unused as of the last day of active employment.
- d. Any severance payment made, whether compulsory or voluntary, under this Agreement shall be conditioned upon both Employee and Employer signing a mutual full release of claims against the other in a form substantially similar to Exhibit A, attached.

10. General Provisions.

This Agreement sets forth the entire understanding between the Employer and Manager relating to the employment of the Manager by Employer. Any prior discussions or representations by or between the parties are merged into and rendered null by this Agreement. The parties may amend this Agreement by mutual agreement in writing. This Agreement is intended to be binding on Employer and Manager and their assigns, successors, heirs, executors, and beneficiaries. The invalidity or partial invalidity of this Agreement shall not affect the validity of the remainder of the Agreement, and such remainder shall be deemed to be in full force and effect as if they had been separately executed by the parties.

11. Effective Date.

This Agreement shall be effective upon April 3, 2023.

12. Appropriations.

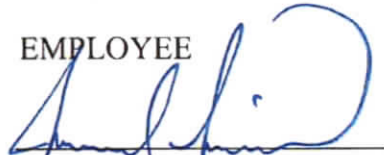
The City has appropriated, set aside and encumbered, and does hereby appropriate, set aside and encumber, available and otherwise unappropriated funds of the City in an amount sufficient to fund and pay all financial obligations of the City to Employee pursuant to this Agreement, including but not limited to all severance payments and benefits, and in such a manner as to not violate the unfunded debt limits as specified in the Texas Constitution and any Texas law. This encumbrance shall be budgeted from a revenue or enterprise fund.

The parties have executed this Agreement on this day of April 3, 2023.


CITY OF AMARILLO


By: Ginger Nelson, Mayor

EMPLOYEE


Jared Miller, City Manager

ATTEST:


Stephanie Coggins, City Secretary

APPROVED AS TO FORM:

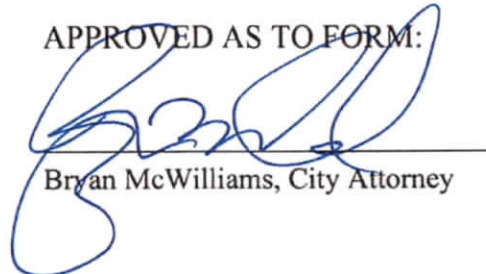

Bryan McWilliams, City Attorney

Exhibit A

MUTUAL GENERAL RELEASE

This Termination Agreement and Mutual General Release (“Agreement”) is made by and between Jared Miller (“Employee”), and the City of Amarillo, Texas, acting by and through its City Council (“Employer”) to resolve issues arising out of or in connection with Employee’s employment with Employer and the termination of that employment.

Employee and Employer signed a written employment contract on April 3, 2023. That contract contains enforceable severance provisions. As consideration for Employer’s payment of all severance due under that contract and the Employee’s release of all other claims (other than breach of the severance provisions of that contract) up to the date of execution of this Mutual Release related to Employee’s employment and the termination of such employment, Employee and Employer agree as follows:

1. *Release of Employer.* Employee hereby, for Employee, Employee’s heirs, executors, assigns and administrators, releases and forever discharges Employer and all of its present, former and future city council members, managers, employees, agents, affiliates, successors and assigns from any and all claims, grievances, other demands and/or causes of action whatsoever, which Employee ever had, now has, or which Employee hereafter can, shall or may have against Employer up to the date of the execution of this Mutual General Release, including, but not limited to, any claim that Employer in any way discriminated against Employee on account of Employee’s race, color, national origin, ethnicity, religion, sex, sexual orientation, gender identity, marital status, veteran status, or age, including claims arising under the Age Discrimination in Employment Act, physical or mental disorders or disability and any claim based on breach of contract, constitutional law, statutory law, or common law, including but not limited to claims based on negligence (whether simple, gross, sole or concurrent), libel, slander, interference with contractual relations, negligent infliction of emotional distress, and intentional infliction of emotional distress, invasion of privacy, assault and battery, intentional or negligent infliction of emotional distress, negligence, gross negligence, estoppel, misrepresentation, breaches of express or implied duties of good faith and fair dealing, and/or tort, for any and all alleged acts, omissions, or events through the Effective Date of this Agreement. Employee specifically does intend to release and shall not be deemed to have waived any claims arising out of any future breach by the Employer of the severance provisions of Employee’s employment contract dated April 3, 2023. By this release, Employee does not intend to release and shall not be deemed to have released any claims that Employee has or may have related to any employee benefit plans (as defined in ERISA) and/or his dependents have or may have to continuation of group health plan coverage under COBRA. The Parties acknowledge and agree that, notwithstanding the provisions of this section, nothing in this Agreement shall be construed to prevent the filing of any claim for unemployment

compensation or a claim for workers' compensation (although any claim asserted pursuant to Tex. Labor Code §451 or any successor provision shall be subject to this release), if applicable. **In addition, nothing in this Agreement is intended or shall be construed to prevent the filing of any charge against the Employer or third parties with any governmental agency, such as the Equal Employment Opportunity Commission, the Texas Workforce Commission or any local governmental civil rights agency or participation in any charge pending with any governmental agency, such as the Equal Employment Opportunity Commission, the Texas Workforce Commission, the National Labor Relations Board, the Department of Labor or any governmental civil rights agency. Notwithstanding the foregoing, the Employee agrees to waive his right to recover monetary damages from any cause of action released herein from the Employer in any charge, complaint or lawsuit arising out of his employment with the Employer, specifically excepting any claim relating to the severance provisions of his employment contract dated April 3, 2023.**

2. Release of Employee. Employer hereby, for Employer, Employer's city council members, managers, employees, agents, affiliates, successors and assigns, releases and forever discharges Employee and all of his present, former and future heirs, representatives, successors and assigns from any and all claims, grievances, other demands and/or causes of action whatsoever, which Employer ever had, now has, or which Employer hereafter can, shall or may have against Employee up to the date of the execution of this Mutual General Release, including, but not limited to, any claim arising out of or in connection with Employee's employment with the Employer, breach of contract, constitutional law, statutory law, or common law, including but not limited to claims based on negligence (whether simple, gross, sole or concurrent), libel, slander, interference with contractual relations, negligent infliction of emotional distress, and intentional infliction of emotional distress, claims for defamation, invasion of privacy, assault and battery, intentional or negligent infliction of emotional distress, negligence, gross negligence, estoppel, misrepresentation, breaches of express or implied duties of good faith and fair dealing, and/or torts for any and all alleged acts, omissions, or events through the Effective Date of this Agreement.

3. Voluntary and Knowing Mutual General Release.

Employee hereby acknowledges that:

- a. Employee has been given at least 21 days to consider this Mutual General Release before signing it;
- b. Employee has been advised by Employer to consult with an attorney of Employee's choice before signing it;
- c. Employee has been advised by Employer that Employee may revoke this Mutual

General Release within seven days after signing it; and

d. The Mutual General Release will be enforceable immediately without further action by either party upon expiration of the revocation period.

4. *Governing Law; Amendment; Binding Effect.* This Mutual General Release shall be construed in accordance with, and governing by, the laws of the State of Texas without regard to principles of conflict of laws. It may not be modified or amended or any term or provision waived or discharged except in writing, signed by the party against whom such amendment, modification, waiver or discharge is sought to be enforced. This Mutual General Release supersedes any and all prior or contemporaneous oral or written agreements other than the severance provisions of Employee's written employment contract dated April 3, 2023, and understandings regarding the subject matter hereof. All the terms of this Mutual General Release whether so expressed or not, shall be binding upon the respective heirs, successors and assigns of the parties hereto and shall inure to the benefit of and shall be enforceable by the parties hereto and their respective heirs, successors and assigns. This Mutual General Release may be signed in separate counterparts, each of which shall constitute an original but all of which together shall constitute one and the same instrument.

The parties have executed this Agreement on this day of _____, 20__.

CITY OF AMARILLO

EMPLOYEE

By: Ginger Nelson, Mayor

Jared Miller

ATTEST:

APPROVED AS TO FORM:

Stephanie Coggins, City Secretary

Bryan McWilliams, City Attorney

10/27/2015 040

AMENDMENT TO EMPLOYMENT AGREEMENT

WHEREAS, the City of Amarillo and W. Jarrett Atkinson have heretofore entered into an Employment Agreement for personal services in the position of City Manager dated May 29, 2012 ("Agreement"); and

WHEREAS, Mr. Atkinson has tendered his resignation as City Manager, and the resignation has been accepted by the Amarillo City Council; and

WHEREAS, the parties have determined that it is in the best interest of the City of Amarillo and Mr. Atkinson that Sections 10F and G of the Agreement be amended in accordance with Section 11 of the Agreement to define and describe the agreed terms of separation from employment, including severance pay:

NOW THEREFORE, for and in consideration of the mutual benefits and obligations accruing to the parties, the City of Amarillo and Mr. Atkinson hereby agree to amend the Agreement as follows:

Sections 10F and G of the Employment Agreement between the City of Amarillo and W. Jarrett Atkinson are hereby amended to read as follows:

10. Severance

...

F. No severance is due if Manager voluntarily elects to resign or retire without a pending or threatened investigation of or disciplinary action against the Manager, except if Manager voluntarily elects to retire on or after January 1, 2015, he shall be entitled to receive severance pay in an amount equivalent to ninety (90) days pay.

G. [deleted].

Except as herein amended all terms and conditions of the Agreement remain in full force and effect. This Agreement is effective as of October 27, 2015.

City of Amarillo

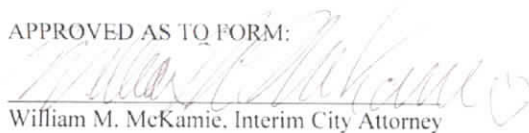
By: 
Paul Harpole, Mayor


W. Jarrett Atkinson

ATTEST:


Frances Hibbs, City Secretary

APPROVED AS TO FORM:


William M. McKamie, Interim City Attorney

EMPLOYMENT AGREEMENT

This Agreement is by and between the City of Amarillo, Texas, acting by and through its City Commission ("Employer") and W. Jarrett Atkinson, ("Manager"). The parties agree as follows:

1. Purpose.

The purpose of this Agreement is to set forth the expectations of and benefits to be provided to W. Jarrett Atkinson while he serves as City Manager of the City of Amarillo.

2. Term.

This Agreement is for an indefinite term of employment. It does not create and shall not be construed as creating an agreement to employ for any specific period of time. The parties agree that this Agreement does not alter the at-will status of the Manager's employment. The provisions of this agreement, as may be amended, apply for the duration of Mr. Atkinson's employment.

3. Duties and Authority.

Employer agrees to employ W. Jarrett Atkinson as City Manager to perform all customary and usual functions and duties of the position of City Manager, including but not limited to those specified by state law; City Charter; any applicable City ordinances, resolutions, and policies; and such other duties as may be prescribed by the City Commission from time to time. Subject to the direction of the majority of the City Commission, the City Manager shall have full administrative and managerial control over the daily operations of the municipal organization, including personnel, equipment, facilities, and programs.

4. Compensation & Benefits.

Employer agrees to pay Manager an initial annual base salary of \$228,575.00, payable in installments at the same time that the other city employees are paid. This Agreement is deemed to be automatically amended to reflect any salary adjustments that are provided by the Employer. Compensation shall be reviewed on an annual basis.

In addition to salary, the following benefits will be paid by the Employer to the Manager. Where a benefit is stated as an annual sum, it shall be paid in installments at the same time each salary payment is made, unless otherwise agreed by manager and Employer.

A. Deferred Compensation. The Employer agrees to deposit in its 457 Plan an amount equal to the maximum allowable amount. The Manager is solely responsible for investment decisions under the 457 Plan, fees, taxes, losses and gains as may arise from participation in such Plan.

B. Automobile Allowance. The Employer agrees to pay the Manager the annual sum of \$6,540.00, as such may be amended in the future by the Employer to be used to purchase, lease, or own a personal vehicle that may also be used for business purposes. The manager is responsible for paying for liability, property damage, and comprehensive insurance coverage on such vehicle and shall further be responsible for all costs attendant to purchase, operation, maintenance, repair, and replacement of such vehicle.

C. Communication Stipend. The Employer agrees to pay the Manager the standard communications stipend paid to employees required to purchase, lease, or own a personal cell phone that may also be used for business purposes. Such phone must be capable of full data services, including but not limited to internet and email access.

D. Business Expenses. The Finance Director is authorized to pay the following expenses in advance or to reimburse Manager for such expenses, upon receiving duly executed receipts, vouchers, statements, or personal affidavit. Employer agrees to budget for and to pay:

(1) Professional dues and subscriptions of the Manager necessary for his continuation and participation in national, state, regional, and local associations and organizations necessary and desirable for the Manager's continued professional growth and for the good of the Employer.

(2) Reasonable and necessary costs of travel and subsistence expenses of the Manager for professional and official travel for City-related business, meetings, official functions, seminars, conventions, and the like.

(3) Reasonable and necessary costs of general expenses of a non-personal but job related nature incurred by Manager in furtherance of Employer's business.

(4) Employer acknowledges the value it receives by having Manager participate and be directly involved in the activities described above, as well as participation in local civic clubs. Accordingly, Employer shall also pay for reasonable membership dues for Manager to become an active member in local clubs or organizations, as and to the extent the Manager may desire.

5. Other Benefits.

Manager shall be entitled to all benefits accorded to other City employees and upon the same terms as other employees, including but not limited to, vacation, sick leave, health plan, dental plan, and others. To the extent allowed by law, the Employer shall provide both a defense and indemnity to the Manager against all claims, suits, demands, causes of action, attorney fees, penalties, fines, and interest that arise out of or relate to the Manager's performance of this Agreement (whether by act or omission) in his official capacity; *provided however*, that grossly negligent, knowingly and intentional, or criminal misconduct is excluded.

6. Work Hours and Outside Employment.

It is recognized that the Manager must devote a great deal of time outside the normal office hours on City business and, to that end:

A. Manager shall be allowed to establish an appropriate work schedule.

B. The employment provided for by this Agreement shall be the Manager's sole employment unless otherwise approved by the City Commission.

7. Other Terms & Conditions.

The Employer may fix other terms and conditions of employment as it may determine from time to time, relating to performance of Manager that are not inconsistent with this Agreement.

8. Evaluation.

At or near the Manager's annual anniversary the City Commission and Manager shall meet in a closed meeting (to the extent allowed by law) for the purpose of evaluating the performance of

the Manager. Such evaluation may be oral, written or in such format as shall be mutually agreed by Manager and Employer.

9. Termination.

This Agreement may be terminated by either: a majority vote of the governing body in a duly authorized public meeting; or, by Manager giving ninety days notice of his resignation and Employer accepting such resignation in a duly authorized public meeting. Upon mutual agreement of the parties, the Manager's notice period may be reduced.

10. Severance.

Severance shall be paid only as follows:

A. In the event Manager is terminated or asked to resign **without cause** during the first year of employment and while Manager remains willing and able to perform duties under this Agreement, then Employer agrees to pay a severance payment equal to three months of Compensation & Benefits and all accrued Other Benefits (defined in Sections 4 & 5, above).

B. In the event Manager is terminated or asked to resign without cause at any time after the first year of employment and while Manager remains willing and able to perform duties under this Agreement, then Employer agrees to pay a severance payment equal to six months of Compensation & Benefits and all accrued Other Benefits (defined in Sections 4 & 5, above), plus an additional month of like payment for each year of service as City Manager, up to a maximum of twelve months of severance pay.

C. All severance pay shall be paid in a single lump sum within ten days following effective date of termination and, will be net of any applicable and customary deductions such as income tax, Medicare, etc.

D. If the Manager is terminated or asked to resign **for cause**, then the Employer is not obligated to pay any severance under this Agreement.

E. The Employer recognizes that the rigors of municipal government may require the Manager to give advice or to take a position that proves unpopular with some individuals. The Manager should not be at risk of dismissal for cause at such moments for performing a politically difficult task. Therefore, the term "cause" as used in this Section 10 shall mean the City Manager engages, by act or omission, in: (i) willful, knowing, grossly negligent or habitual neglect of an obligation required to be performed by the Manager or refrained from by the Manager under this Agreement, City ordinance, or the laws of this State or the United States; (ii) misconduct involving an act of moral turpitude, a criminal act involving moral turpitude, or habitual violations of traffic laws, whether any such act or violation relates to Manager's official's duty or not; (iii) knowing or grossly negligent misapplication or misuse of public funds, equipment, property, or personnel of the City or an agency or corporation thereof; (iv) an act of fraud, or of intentional misrepresentation to the City Commission; or, (v) any other public conduct that tends to bring substantial discredit on the City government. Nothing in this subsection shall be construed as limiting or modifying the provisions of Section 2, above.

F. No severance is due if Manager voluntarily elects to resign or retire without a pending or threatened investigation of or disciplinary action against the Manager.

G. Any severance payment made, whether compulsory or voluntary under this Agreement, shall be conditioned upon both Manager and Employer signing a mutual full release of claims against the other.

11. General Provisions.

This Agreement sets forth the entire understanding between the Employer and Manager relating to the employment of the Manager by Employer. Any prior discussions or representations by or between the parties are merged into and rendered null by this Agreement. The parties may amend this Agreement by mutual agreement in writing. This Agreement is intended to be binding on Employer and Manager and their assigns, successors, heirs, executors, and beneficiaries. The invalidity or partial invalidity of this Agreement shall not affect the validity of the remainder of the Agreement, and such remainder shall be deemed to be in full force and effect as if they had been separately executed by the parties.

The parties have executed this Agreement and it is effective on this date unless otherwise specified elsewhere herein, on this 29th day of May, 2012.

City of Amarillo

By: 
Paul Harpole, Mayor


W. Jarrett Atkinson

By: 
W. Jarrett Atkinson, City Manager

ATTEST:


Donna DeRight, City Secretary

APPROVED AS TO FORM:


Marcus W. Norris, City Attorney



City of Amarillo 2024 Retiree Benefits Guide



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Benefit Contacts

	Phone in CST/Web Address
City of Amarillo Benefits Department City Hall, 601 S. Buchanan Street, Rm. 104	806-378-4235 (M-F, 8am to 5pm) Benefits@amarillo.gov
City of Amarillo Accounting Department City Hall, 601 S. Buchanan Street, Rm. 301	806-378-6202 (M-F, 8am to 5pm) – Questions about retiree insurance premium payments.
Prescription Drug Program – MaxorPlus Pharmacy	800-687-8629 – General Questions (24/7) 866-629-6779 – MaxorPlus Specialty (24/7) www.maxorplus.com or MaxorPlus App
Medical – Aetna (Group #737475)	800-410-2386 (M-F, 7am to 7pm) – General Questions 855-TELADOC (24/7) or Teladoc App 800-556-1555 – Aetna 24-Hour Nurse Line www.Aetna.com or Aetna App (Text “AETNA” to 90156 to receive a link to download the Aetna Health App)
Dental - MetLife (Group #126985)	800-942-0854 – General Questions 877-963-8932 – MyBenefits IT Support (M-F, 7am to 10pm/ Voice Response Unit, extended weekday hours and Saturdays) www.metlife.com/mybenefits or MetLife App (search “MetLife”)
Life Insurance - The Standard Insurance Company (Group #646089)	888-937-4783 – General Questions (M-F, 7am to 7pm) 800-628-8600 – Life Claims 800-378-4668 – Portability/Conversion Questions www.standard.com
457 Deferred Compensation – Nationwide (Plan #0038510001)	877-677-3678 – Customer Service (M-F, 7am to 10pm; Sat 8am to 5pm) www.nrsforu.com or Nationwide App Jim Hammock, Lubbock Nationwide Representative 806-441-6069 (M-F, 8am to 5pm) Email: hammj25@nationwide.com
Pension Plan - TMRS (City of Amarillo Plan #00030)	800-924-8677 (M-F, 8am to 5pm) www.tMrs.com or TMRS App
Pension Plan - Amarillo Fireman’s Relief and Retirement Fund (AFRRF)	806-378-3040 Finance Department (M-F, 8am to 5pm) City Hall 3rd Floor, Rm. 301.
Employee Assistance Plan (EAP) – Deer Oaks EAP Services	888-993-7650 (24/7) or iConnectYou App (Passcode is 131997) www.deeroakseap.com (Username & Password – Amarillo)
Voluntary Insurance Products - AFLAC	806-418-8881 (M-F, 8am to 5pm) aflac.com/myaflac or MyAflac App
VIA Benefits through Towers Watson	844-596-0468 (M-F, 7am to 6pm) https://my.viabenefits.com/cityofamarillo or VIA Benefits App
Health Reimbursement Account (HRA) – HealthSecure	888-364-5027 – Customer Service Email: customercare@healthsecurehra.com Website: www.healthsecurehra.com
Sterling Administration - COBRA	800-617-4729 – Customer Service (M-F, 10am to 7pm) Email: customer.service@sterlingadministration.com

Benefits Overview

When Coverage Begins: Pre-65 Retiree Medical and Dental Plans

To be eligible to receive these benefits you must be enrolled in the medical and/or dental plan on the day you retire and be 60 years of age or older with at least 10 years of service or received approved disability retirement approval through Texas Municipal Retirement System (TMRS) or Amarillo Fireman's Relief and Retirement Fund (AFRRF), or 20 years of service at any age.

- ✓ You must be enrolled in the City's medical and/or dental plan(s) at the time of retirement to be eligible for this benefit. Only dependents (legal spouse and eligible children) enrolled in the medical and/or dental plan(s) prior to retirement are eligible to enroll in these plans.
- ✓ Retiree medical premiums are based on your years of service with the City of Amarillo (i.e., you have 12 years and 6 months of service with the City of Amarillo, your premium year of service used will be 12 years).
- ✓ If you choose not to enroll in the pre-65 medical and/or dental plans at time of retirement, your election is irrevocable where you cannot elect coverage at a later date.
- ✓ If your legal spouse is on the pre-65 medical/dental plans and you become divorced, the ex-spouse must be dropped from the coverage within 31 calendar days from the date of the divorce.
- ✓ Failure to drop an ineligible dependent within 31 calendar days from the event date may result in incurred claims not being paid and the member being responsible for all costs incurred.
- ✓ If you are divorced and later become married again, you cannot add a new legal spouse to these plans.
- ✓ You may drop coverage anytime throughout the year. You do not need to experience a qualifying life event, nor do you need to wait until open enrollment to cancel coverage for your legal spouse and/or children covered under the pre-65 medical/dental plan, however you cannot add them back on the plans later. Your election to drop pre-65 retiree healthcare coverage on yourself and/or your covered dependent is irrevocable.
- ✓ Child(ren) enrolled under the pre-65 retiree medical and dental plans can remain on the plans up to the age of 26. Coverage will then automatically be dropped on the last day of the month they turn 26 years of age.
- ✓ When either the retiree and/or spouse turns 65 and children are covered under the pre-65 medical/dental plans, the children will automatically be dropped from coverage at the end of the month that they turn 65.
- ✓ When the retiree and/or their spouse turns 65 years of age continuation of coverage through COBRA is not allowed and will transition to enrollment in Medicare using VIA Benefits at time of eligibility.
- ✓ If an employee retires and elects the pre-65 retiree medical/dental plans there will be no lapse in coverage moving from the active to the pre-65 plans. Your first premium payment on the pre-65 retiree plan is determined by the last day of the pay period following your retirement date.
- ✓ The Accounting Department mails out invoices at the beginning of each month for that current month's premium and premiums are due by the 19th of each month.
- ✓ Failure to pay premiums by the established deadline will result in termination of coverage. If coverage is terminated due to non-payment, coverage cannot be reinstated for the retiree and/or dependents enrolled under the pre-65 plans.

When Coverage Begins: Pre-65 Retiree Medical and Dental Plans (Continued)

- ✓ Monthly premiums payment options are: 1) checking or savings account drafted out of the account on the 20th of each month or 2) by personal check or money order mailed in or dropped off in person and received in Accounting by the 20th of each month. Note: If funds are not available when drafted then failure to pay the premiums owed can result in coverage being terminated and there will be a \$30.00 NSF fee. The Accounting Office's phone number is located under Benefit Contacts.
- ✓ Pre-65 Healthcare Premiums Deducted from Pension Checks
 - Firefighters – Medical, dental and life insurance premiums can be deducted from the monthly pension check by filling out an Insurance Premium Payment Deduction form at the time of retirement.
 - If there is an increase in premiums for the following calendar year and you have elected insurance premiums to be deducted from your pension check, you will be required to fill out and return the signed form by the established deadline. These forms will be mailed to your home address on file at the end of the year for the following calendar year change. Failure to return the signed form in a timely fashion will result in the change in premiums being overdue which could result in termination of coverage for failure to make up the difference in premium owed. It is the retiree's responsibility to make sure their insurance premiums are paid on time and the form is returned to the Finance Department.
- ✓ Eligibility for Medicare while on Pre-65 Medical Plan
 - If either the Retiree and/or spouse becomes eligible for Medicare while on the City's pre-65 retiree medical plan and medical coverage is continued through the City, Medicare pays primary, and the City's medical plan will be secondary.
 - If either the retiree or spouse becomes eligible for Medicare and does not enroll during the enrollment window, the medical plan will apply a Medicare estimate first and then will pay according to the pre-65 medical plan benefits.
 - If the Retiree and/or spouse is eligible for Medicare and drops the pre-65 medical insurance with the City, they will not be eligible to re-enroll in the pre-65 medical plan and will forfeit their post-65 HRA medical benefit. This election is thus irrevocable.
- ✓ If the Retiree Dies:
 - Legal spouse enrolled under the pre-65 medical/dental plan will be allowed to stay on the plans up to the age of 65.
 - If the legal spouse remains on the pre-65 medical plan up to their 65th birthday, they are eligible for the HRA benefit in the amount up to \$1800 a year.
 - Child(ren) enrolled under the pre-65 medical/dental plan will be automatically dropped from coverage at the end of the month when the retiree's spouse turns 65 years of age.
- ✓ Annual Benefit Plan Changes:
 - **The Benefits Department will provide the opportunity one time each year in the October/November timeframe where you can elect to change from either the Medical and/or Dental plan. However, you cannot add new dependents to the pre-65 retiree plans.**
- ✓ COBRA continuation may be eligible for dependents losing coverage under the medical and/or dental plans. Sterling administers the COBRA plan for the City and any questions can be directed to the vendor and their contact information is listed on pg. 2 of the guide.

When Coverage Ends: Pre-65 Retiree Medical and Dental Plans

Your pre-65 medical (includes prescription)/dental benefits will end the last day of the month prior to the month you turn 65 years of age. The only exception is if your birthday falls on the 1st of the month, Medicare then begins the 1st of the previous month you turn 65 years of age (i.e., July 1st birthday, Medicare begins June 1st). You will then be eligible to enroll in the Medicare Exchange Service offered by VIA Benefits through Willis Towers Watson.

2024 Monthly Retiree Premiums

MEDICAL PLAN 1

Years of Service*	Retiree Only	Retiree & Spouse	Retiree & Children	Retiree & Family
10 or Less	\$544.40	\$1,088.77	\$812.85	\$1,245.38
11	\$522.02	\$1,044.02	\$783.03	\$1,200.63
12	\$499.66	\$999.28	\$753.20	\$1,156.36
13	\$477.27	\$954.54	\$723.36	\$1,111.16
14	\$454.89	\$909.80	\$693.53	\$1,066.40
15	\$432.53	\$865.05	\$663.71	\$1,021.67
16	\$410.16	\$820.31	\$633.89	\$976.93
17	\$387.78	\$775.57	\$604.04	\$932.16
18	\$365.42	\$730.81	\$574.22	\$887.43
19	\$343.04	\$686.07	\$544.40	\$842.68
20	\$320.68	\$641.33	\$514.56	\$797.95
21	\$298.30	\$596.59	\$484.73	\$753.20
22	\$275.93	\$551.84	\$454.89	\$708.46
23	\$253.54	\$507.10	\$425.07	\$663.71
24	\$231.19	\$462.33	\$395.25	\$618.98
25-29	\$208.80	\$417.61	\$365.42	\$574.22
30+	\$201.35	\$402.70	\$357.96	\$559.31

*Retiree medical premiums are based on your years of service with the City of Amarillo (i.e., you have 12 years and 6 months of service with the City of Amarillo, your premium year of service used will be 12 years).

2024 Monthly Retiree Premiums

MEDICAL PLAN 2

Years of Service*	Retiree Only	Retiree & Spouse	Retiree & Children	Retiree & Family
10 or Less	\$598.84	\$1,306.52	\$975.42	\$1,494.45
11	\$574.22	\$1,252.83	\$939.64	\$1,440.76
12	\$549.63	\$1,199.14	\$903.84	\$1,387.64
13	\$524.99	\$1,145.44	\$868.04	\$1,333.38
14	\$500.38	\$1,091.76	\$832.24	\$1,279.68
15	\$475.79	\$1,038.06	\$796.46	\$1,226.01
16	\$451.18	\$984.38	\$760.67	\$1,172.31
17	\$426.56	\$930.68	\$724.85	\$1,118.59
18	\$401.96	\$876.98	\$689.06	\$1,064.92
19	\$377.34	\$823.28	\$653.29	\$1,011.22
20	\$352.75	\$769.59	\$617.47	\$957.54
21	\$328.13	\$715.91	\$581.69	\$903.84
22	\$303.52	\$662.20	\$545.86	\$850.15
23	\$278.90	\$608.52	\$510.09	\$796.46
24	\$254.32	\$554.79	\$474.30	\$742.77
25-29	\$229.68	\$501.13	\$438.50	\$689.06
30+	\$221.48	\$483.24	\$429.55	\$671.17

*Retiree medical premiums are based on your years of service with the City of Amarillo (i.e., you have 12 years and 6 months of service with the City of Amarillo, your premium year of service used will be 12 years).

2024 Monthly Retiree Premiums

DENTAL PLAN 1

Plan Option	Premium
Retiree Only	\$39.96
Retiree and Spouse	\$75.34
Retiree and Child(ren)	\$70.33
Retiree and Family	\$105.48

DENTAL PLAN 2

Plan Option	Premium
Retiree Only	\$43.96
Retiree and Spouse	\$82.89
Retiree and Child(ren)	\$77.37
Retiree and Family	\$116.03

Medical Plans

The Medical Plans are an Exclusive Provider Organization (EPO) medical plan through Aetna and it offers you access to a broad network of in-network providers and facilities. The medical plan will only provide coverage for in-network services. Out-of-network services “will not” be covered under the medical plan. However, in emergency situations out-of-network services may be covered under the medical plan. Note: Outside the local Amarillo area there is a nationwide network through Aetna where you can seek care from other in-network providers and facilities.

In the local Amarillo area, the in-network hospital/facilities you can use is through Northwest Texas Hospital. Services performed at BSA hospital/facilities are out-of-network and will not be covered under the medical plan.

Locate in-network providers/facilities at www.Aetna.com or through the Aetna Health App (Text “AETNA” to 90156 to receive a link to download the Aetna Health App). First time users must set up and register an account through the Aetna site or App. Once registered, you can locate in-network providers/facilities locally or nationwide. You must log into your account every time to locate in-network facilities/providers. Aetna customer service representatives are also available to assist with in-network searches and their number is located on your Aetna card.

A medical card with prescription information on the back of the card is mailed to your home address on file for new hires and replacement cards can be requested by contacting Aetna customer service.

Summary of Medical Plan Coverage:

MEDICAL PLAN 1	
FEATURES	IN-NETWORK
Deductible (per calendar year)	\$1,500 Individual \$3,000 Family
Out-of-Pocket Limit (per calendar year) Includes deductible, coinsurance, and prescription co-pays	\$5,000 Individual \$10,000 Family
Out-of-Network Coverage	None , except for emergencies
PREVENTIVE CARE	IN-NETWORK
Routine Adult Physical Exams/Immunizations	Covered 100% (deductible/co-pay waived)
Routine Well Visit Exams	Covered 100% (deductible/co-pay waived)
PHYSICIAN SERVICES	IN-NETWORK
Office and Specialty Visits	Covered 80%, AFTER Deductible
DIAGNOSTIC PROCEDURES	IN-NETWORK
Diagnostic X-Ray	Covered 80%, AFTER Deductible
Diagnostic Laboratory <u>using Quest Diagnostic Labs</u>	Covered 100% (deductible/co-pay waived) Note: Quest Diagnostic Labs has facilities across the U.S. Log into your account online at www.Aetna.com to find a Quest location.
Diagnostic Laboratory (other than Quest)	Covered 80%, AFTER Deductible IF done by any other laboratory/physician office.
Diagnostic Complex Imaging (MRI/CT/PET SCAN)	Covered 80%, AFTER Deductible

EMERGENCY MEDICAL CARE	IN-NETWORK
Urgent Care	Covered 100% (deductible/co-pay waived)
Walk-In Clinics	Covered 100% (deductible/co-pay waived)
Emergency Room	Covered 80%, AFTER Deductible
Ambulance	Covered 80%, AFTER Deductible
HOSPITAL CARE (Northwest Texas Hospital - Nwth)	IN-NETWORK
Inpatient Coverage (In Amarillo, the only in network facility is Nwth)	Covered 80%, AFTER Deductible
Inpatient Maternity Coverage (includes delivery and postpartum care)	Covered 80%, AFTER Deductible
Outpatient Hospital or Surgery	Covered 80%, AFTER Deductible
MENTAL HEALTH SERVICES	IN-NETWORK
Inpatient and Outpatient Treatment	Covered 80%, AFTER Deductible
ALCOHOL/DRUG ABUSE SERVICES	IN-NETWORK
Outpatient Treatment	Covered 80%, AFTER Deductible
OTHER SERVICES	IN-NETWORK
Outpatient Short-Term Rehabilitation Includes Speech, Physical, and Occupational Therapy	Covered 80%, AFTER Deductible
Spinal Manipulation Therapy	Covered 80%, AFTER Deductible Limited to 20 visits per calendar year
Durable Medical Equipment	Covered 80%, AFTER deductible
Prosthetics	Covered 80%, AFTER deductible
Hearing Aids	\$2,000 maximum every 3 years, AFTER Deductible

MEDICAL PLAN 2

FEATURES	IN-NETWORK
Deductible (per calendar year)	\$1,500 Individual \$3,000 Family
Out-of-Pocket Limit (per calendar year) Includes deductible, coinsurance, and medical/prescription co-pays	\$5,000 Individual \$10,000 Family
Out-of-Network Coverage	None , except for emergencies
PREVENTIVE CARE	IN-NETWORK
Routine Adult Physical Exams/Immunizations	Covered 100% (deductible/co-pay waived)
Routine Well Visit Exams	Covered 100% (deductible/co-pay waived)
PHYSICIAN SERVICES	IN-NETWORK
Office Visit	\$25
Specialist Visit (includes mental health)	\$50
DIAGNOSTIC PROCEDURES	IN-NETWORK
Diagnostic X-Ray	Covered 80%, AFTER Deductible
Diagnostic Laboratory <u>using Quest Diagnostic Labs</u>	Covered 100% (deductible/co-pay waived) Note: Quest Diagnostic Labs has facilities across the U.S. Log into your account online at www.Aetna.com to find a Quest location.
Diagnostic Laboratory (other than Quest)	Covered 80%, AFTER Deductible IF done by any other laboratory/physician office.
Diagnostic Complex Imaging (MRI/CT/PET SCAN)	Covered 80%, AFTER Deductible
EMERGENCY MEDICAL CARE	IN-NETWORK
Urgent Care	Covered 100% (deductible/co-pay waived)
Walk-In Clinics	\$25 Co-pay
Emergency Room	Covered 80%, AFTER Deductible
Ambulance	Covered 80%, AFTER Deductible
HOSPITAL CARE (Northwest Texas Hospital - NWTH)	IN-NETWORK
Inpatient Coverage (In Amarillo, the only in network facility is NWTH)	Covered 80%, AFTER Deductible
Inpatient Maternity Coverage (includes delivery and postpartum care)	Covered 80%, AFTER Deductible
Outpatient Hospital or Surgery	Covered 80%, AFTER Deductible
MENTAL HEALTH SERVICES	IN-NETWORK
Inpatient and Outpatient Treatment	Covered 80%, AFTER Deductible
ALCOHOL/DRUG ABUSE SERVICES	IN-NETWORK
Outpatient Treatment	Covered 80%, AFTER Deductible
OTHER SERVICES	IN-NETWORK
Outpatient Short-Term Rehabilitation Includes Speech, Physical, and Occupational Therapy	Covered 80%, AFTER Deductible
Spinal Manipulation Therapy	\$50 Co-Pay (Specialist Office Visit) Limited to 20 visits per calendar year
Durable Medical Equipment	Covered 80%, AFTER deductible
Prosthetics	Covered 80%, AFTER deductible
Hearing Aids	\$2,000 maximum every 3 years, AFTER Deductible

100% Covered Medical Services – Both Medical Plans

Under both medical plans, some medical services that are covered at 100% or at a reduced cost. This allows you and your enrolled family members to have quality care with little or no cost depending on the service(s) provided.

Preventative Care Screenings: If enrolled in a medical plan there are preventative care services for enrollees that are covered at 100%. You can also contact Aetna customer service for more information on other preventative care services under the medical plan.

In-Network Urgent Care/Walk-In Clinic Visits: If enrolled in a medical plan, urgent care clinic visits using an in-network facility will be covered at 100% with no cost share to the member.

Teladoc: Teladoc is a telehealth medical service offered to City medical plan members. Members can call Teladoc at 1-855-Teladoc (1-855-835-2362) or access via Smartphone app (search for Teladoc) to request a visit. If you have a Smartphone, we encourage members to download the app and enter your demographic information. This will eliminate the need to register when you need the service. A medical doctor will assess you over the phone or by video conference call. In addition, the provider may also call-in necessary prescriptions at the member's requested pharmacy.

24-Hour Nurse Line: The 24-Hour Nurse Line can provide helpful information and possibly prevent an unneeded trip to the doctor's office. You can call the toll-free number listed in this guide on pg. 2 or go to www.Aetna.com and log into your account.

Quest Diagnostic Labs: Lab work is 100% paid. Log into your account at www.Aetna.com to locate local/nationwide providers. The Amarillo location is at 2207 S. Western Street, Space 50, Amarillo, TX 79109, and phone number is (806) 358-0880. Hours of operation: M-Th 8am to 5pm (closed for lunch from 12:30 to 1:30pm) and Friday 8am to 2:00pm. To schedule an appointment, you can call 1-888-277-8772 or go online at <https://appointment.questdiagnostics.com>.

Prescription Drug Plan

If you enroll in the medical plan, you will automatically receive prescription drug coverage through **MaxorPlus Pharmacy**. Your prescription drug plan information will be located on the back side of your Aetna medical card. Note, co-pays do apply towards the out-of-pocket maximum under the medical plan. Using your Smartphone download the MaxorPlus App for quick access to your prescription information.

Category	Retail (30-Day Supply)	Mail Order (90-Day Supply)
Generic Drugs - Walmart/Sam's:	\$10	\$20 (You can get a 90-day supply of your medication at Walmart/Sam's OR through MaxorPlus Mail Order)
Generic Drugs Filled Somewhere Other than Walmart/Sam's:	\$15	\$20 (You can get a 90-day supply of your medication at Walmart/Sam's OR through MaxorPlus Mail Order)
Preferred Brand Drugs:	\$35	\$70
Non-Preferred Brand Drugs:	\$50	\$100
Specialty Drugs (limited to a 30-day supply only):	\$65	Not Available – You may only get a 30-day supply

MaxorPlus Pharmacy offers certain preventive medications to you at no cost (\$0 copay)

Preventive Medications: \$0 copay

- Generic aspirin for cardiovascular & colorectal cancer prevention for patients 50 and older
- Generic aspirin for women at high risk of pre-eclampsia
- Bowel prep generics medications for patients ages 45-75
- Breast cancer prevention generic tamoxifen, raloxifene, or aromatase inhibitors for women who are at increased risk for breast cancer
- Generic, over-the-counter (OTC), and prescription folic acid medications for women up to the age of 55
- Generic fluoride oral supplements up to the age of 6
- Tobacco deterrents annual limit of 2 cycles of treatment (12 weeks/cycle) only on generics and brands with no generics

Contraceptives: \$0 Copay

- Generics & brands with no generics

Statins: \$0 Copay

- Generic lovastatin at \$0 without Prior Authorization for ages 40-75*

**Prior Authorizations can be requested for other low-to-moderate dose statins*

MaxorPlus Pharmacy offers certain preventive medications to you at no cost (\$0 copay) - Continued

HIV-pre-exposure prophylaxis (PrEP): \$0 Copay

- Truvada for adolescents and adults who are at high risk of HIV acquisition*

**Prior Authorization is required*

Immunizations/Vaccines/Toxoids: \$0 Copay

- Diphtheria Toxoid
- Haemophilus Influenza Type B Vaccine
- Hepatitis A vaccine - min 12 months
- Hepatitis B vaccine
- Human Papillomavirus Vaccine - max 26 years
- Influenza Vaccine - min 6 months
- Measles Vaccine - min 12 months to max 60 years old
- Mumps Vaccine - min 12 months to max 60 years old
- Rubella Vaccine - min 12 months to max 60 years old
- Meningococcal Vaccine
- Pertussis
- Pneumonia Vaccine
- Polio Vaccine - max 18 years
- Rotavirus Vaccine
- Shingles Vaccine - Zostavax (min 60 years old); Shingrix (min 50 years old)
- Tetanus Toxoid
- Varicella Vaccine - min 12 months
- COVID-19
- Respiratory Syncytial Virus (RSV) – up to age 2 and 60 plus
- Combinations of the above

Vision Plan

- ✓ Active coverage ends the last day of the pay period that the retirement date falls in. Employees and their eligible dependents enrolled in the vision plan on the date of retirement will be able to elect COBRA within 60 days of their termination date or as mandated by Federal Law.
- ✓ COBRA paperwork will be mailed within 14 days of the employee's termination date by our COBRA Administrator Sterling. If you have questions about COBRA continuation, please contact Sterling and their contact information is in the contact list within this guide.
- ✓ If the spouse and/or children covered under the vision plan have a different address than the employee this information must be provided to the Benefits Office.

Dental Plans

The Dental Plans will continue to provide you and your family with coverage for typical dental expenses, such as cleanings, x-rays, and fillings. The dental plan is provided through **MetLife**. The MetLife Provider Network used is **PDP Plus**.

DENTAL PLAN 1	
<u>Annual Deductible*</u>	
Individual	\$50
Family	\$100
*The deductible applies to “only” Out-of-Network providers for Basic/Major Restorative and Children Orthodontic Services	
<u>Annual Benefit Maximum</u> (Per Member)	\$1,000
Applies to preventative, basic and major services.	
<u>Preventive Services</u> - Cleanings (3 per year), exams, x-rays	100% (no deductible)
<u>Basic Services</u> – Fillings, extractions	80% (after deductible*)
<u>Major Services</u> – Bridges, dentures	50% (after deductible*)
<u>Orthodontia for Children</u> (up to 19 years of age)	\$1,500 per Lifetime (50% of Negotiated Fee)
Note: Adult orthodontics is not covered by this plan.	

DENTAL PLAN 2	
<u>Annual Deductible*</u>	
Individual	\$0
Family	\$0
*No deductible applied when using either in- or out-of-network providers.	
<u>Annual Benefit Maximum</u> (Per Member)	\$1,500
Applies to preventative, basic and major services.	
<u>Preventive Services</u> – Cleanings (3 allowed each calendar year), exams, x-rays	100%
<u>Basic Services</u> – Fillings, extractions	80%
<u>Major Services</u> – Bridges, dentures	50%
<u>Orthodontia for Children</u> (up to 19 years of age)	\$1,500 per Lifetime (50% of Negotiated Fee)
<u>Orthodontia for Adults</u> (Employee and Legal Spouse)	

Dental Information

- You will **not** receive an ID Card. When visiting a dentist, the member will simply provide employee's name and social security number. If you want to print a temporary dental ID card, go to www.metlife.com/benefits and "Register Your Account" for the first-time logging into this site.
- Use of an in-network provider under Dental Plan 1 for Basic, Major or Children Orthodontia will provide savings for certain services under this Plan. Search for participating dentists in MetLife's network – www.metlife.com/dental, click on "Find a Participating Dentist," select "PDP Plus" under your Network and search by zip code and dentist/practice name is optional or through MetLife App (search "MetLife").
- Orthodontia benefits include traditional ortho braces, Invisalign, clear aligners (through Smile Direct Club). Contact MetLife customer service for more information about this benefit.
- Provided above is a summary of your dental benefits, contact MetLife directly if you have additional questions about your dental benefits.

Life Insurance

The Standard Insurance Company “The Standard” is the vendor for our life insurance plans. Life insurance information regarding conversion/portability of life insurance at time of retirement and retiree life insurance is provided below.

Life Insurance Portability/Conversion at Time of Retirement

- ✓ Employees are eligible for portability (under the age of 65) or conversion of their current life insurance policies for themselves and or eligible dependents within 31 calendar days of the termination date. Please contact The Standard Continued Benefits number for questions about converting/porting your life insurance with the City.

Waiver of Premium – Approved for Disability Retirement

- ✓ If an employee becomes disabled because of permanent disability, they may be eligible for a waiver of premium for life insurance elected while an active employee. This Waiver of Premium benefit is available up to 60 years of age. The Waiver of Premium benefit includes the employer paid Basic Life and Additional Life Insurance elected for the employee, spouse and/or children. The Waiver of Premium packet must be completed and turned into the insurance provider within 31 calendar days from the date of termination. If approved for Disability Retirement you must convert the employer paid Basic Life and Additional Life elected for you and your dependents and pay the premiums to the Standard until Waiver of Premium is approved. Once Waiver of Premium is approved, the Standard will refund premiums paid during the waiting period. If applying for Waiver of Premium, you can elect retiree life and/or spouse insurance, however if you are approved the City will refund premiums you paid on the retiree and/or spouse life policies. If approved by the life insurance provider, there is a 180-day waiting period before the benefit begins from the date the attending physician certifies disability. If approved for Waiver of Premium this coverage ends when the retiree turns 65 years of age. When Waiver of Premium ends you have 31 calendar days from the Retiree’s 65th birthday to contact the City of Amarillo’s Benefits Department to enroll in the Retiree and/or Spouse Life insurance.

Retiree/Spouse Basic Life Policies

- ✓ Employees are eligible to elect a \$5,000 or \$10,000 Retiree Life Insurance policy on themselves at the rates shown in the table below. Note: You can still elect either of these Retiree Life Insurance policies and still convert your current life insurance policies (portability is not an option available if you elect this retiree policy).
- ✓ A Retiree Spouse Life Insurance policy is available in the amount of \$5,000 if you elect the Retiree \$10,000 Life Insurance Policy.
- ✓ You will be asked at the time of retirement to review and update your Life Insurance Beneficiary information. Note, you can change your beneficiaries anytime throughout the year.

Type of Coverage	Monthly Premium
Retiree \$5,000	\$13.00
Retiree \$10,000	\$26.00
Spouse \$5,000	\$6.25 (if Retiree selects \$10,000 policy only)

Post-65 Retiree Benefits

Retirees and their legal spouse must be enrolled in the medical plan at time of retirement to be eligible for the post-65 HRA benefit offered by VIA Benefits through Towers Watson.

If the retiree and/or spouse are 65 years of age or older at time of retirement, they will enroll in VIA Benefits through Towers Watson at time of retirement. Your current medical and dental coverage will continue through the end of the following month after retirement and you will self-pay these premiums directly to the Accounting Office.

The retiree and/or spouse will be transitioned to this service when they reach the age of 65 and are Medicare eligible. Enrollment in Medicare using VIA Benefits at time of eligibility allows the retiree and/or spouse up to \$1800 each year into a Health Reimbursement Account (HRA). The HRA allows you to pay for Medicare insurance premiums and other healthcare eligible expenses. Additional information about this benefit is provided below.

- ✓ The retiree and/or spouse who is attaining age 65 will be transitioned off the retiree medical and dental plans. All other dependents who are eligible will remain on the plan(s) until they no longer meet the eligibility requirements. This may result in a change in healthcare insurance premiums, so it is important that retirees check their ACH after there is a change in coverage.
- ✓ You and your legal spouse enrolled in the pre-65 medical plan are both eligible up to \$1800 each year through VIA Benefits for your post-65 retirement HRA benefit. The first year will be prorated based on the date of retirement.
- ✓ **Approximately 3 months from your 65th birthday** you should receive enrollment materials from VIA Benefits. If you have not received this information by this time, please contact VIA Benefits.
- ✓ **The employee is eligible to remain on this plan for their lifetime unless disenrollment from VIA Benefits occurs.**
- ✓ **You must stay enrolled in VIA Benefits to continue receiving this benefit. If you go outside VIA Benefits you cannot continue to receive these benefits and you cannot enroll at a later date.**
- ✓ If the retiree passes away, the spouse is still eligible to continue the HRA benefit for their lifetime unless disenrollment from VIA Benefits occurs.
- ✓ VIA Benefits customer service number is 1-844-596-0468, M-F, 7am to 6pm CST and their employee website is <https://my.viabenefits.com/cityofamarillo>.

Pension Benefits

Texas Municipal Retirement System (TMRS)

- ✓ Your TMRS account will be retired on the last day of the month you are retiring.
- ✓ If electing to take your pension immediately following your retirement, your first pension check will be received the last business day of the following month after your retirement date (i.e., retiring in June, your first check will be received the last business day in July).
- ✓ Questions about your TMRS benefit, call TMRS customer service.

Amarillo Fireman Relief and Retirement Fund (AFRRF)

Firefighters will need to refer to the AFRRF for retirement eligibility requirements. Contact the Finance Department for any questions about this plan.

Other Retirement Plans

457b Deferred Compensation Plan through Nationwide

Any questions about taking a distribution or rolling over your monies into a retirement account, please call Nationwide.

Other Benefits/Information

Accrued Sick Leave at Time of Retirement

- ✓ Up to 10 years of continuous service – Not eligible to cash out accrued sick leave (excludes Firefighters and Police Officers – see below).
- ✓ All City Employees (excluding Chapter 143 Firefighters and Police Officers) hired on or after October 1, 2007, with 10+ years of continuous service - 100% payment of accrued sick leave up to 60 days at time of retirement. Sick leave is capped at 480 hours. Can be cashed out and taxed accordingly if taking lump sum option or if enrolled in the 457 Deferred Compensation plan can elect to rollover the cash value of this sick leave at the employee's hourly rate pre-tax.
- ✓ Firefighters/Police Officers – Regardless of years of service, 100% payment of accrued sick leave up to 90 days at time of retirement. Can be cashed out and taxed accordingly if taking lump sum option or if enrolled in the 457 Deferred Compensation plan can elect to rollover the cash value of this sick leave at the employee's hourly rate pre-tax.
- ✓ All City employees hired on or before October 1, 2007, with 10+ years of continuous service and Firefighters/Police Officers, that are “retiring from the City”, will convert any accrued sick leave in excess of 90 days at time of retirement into a Health Reimbursement Account (HRA). Each 30 hours of accrued sick leave above 90 days will be converted to the equivalent of one month of retiree-only medical plan 1 coverage based on years of service with the City of Amarillo. The resulting dollar value will be deposited into the retiree's HRA account at time of retirement.
- ✓ The HRA account is set up and managed by HealthSecure and once enrolled information will be sent to the retiree's mailing address.

Accrued Annual Leave (AL) at Time of Retirement

- ✓ All City employees (excluding Chapter 143 Firefighters and Police Officers) hired on or after October 1, 2007, are eligible to cash out their annual leave at their current hourly rate up to 30 days at time of termination. Can be cashed out and taxed accordingly if taking lump sum option or if enrolled in the 457 Deferred Compensation plan can elect to rollover the cash value of this leave at the employee's hourly rate pre-tax up to IRS annual limits.
- ✓ All City employees hired prior to October 1, 2007, shall be eligible to cash out their accrued annual leave at their current hourly rate at time of retirement not to exceed 65 days. Can be cashed out and taxed accordingly if taking lump sum option or if enrolled in the 457 Deferred Compensation plan can elect to rollover the cash value of this leave at the employee's hourly rate pre-tax.
- ✓ All City employees hired prior to October 1, 2007 "electing to retire", will be allowed to convert any accrued annual leave above 65 days into a Health Reimbursement Account (HRA). Each 30 hours of accrued annual leave above 65 days will be converted to the equivalent of one month of retiree-only medical plan 1 coverage based on years of service with the City of Amarillo. The resulting dollar value will be deposited into the retiree's HRA account at time of retirement.
- ✓ The HRA account is set up and managed by HealthSecure and once enrolled information will be sent to the retiree's mailing address.

Retiree Assistance Program through Deer Oaks

The City realizes that planning for and adjusting to retirement can be difficult. That is why we allow retirees and their household members to continue to access the Employee Assistance Program (EAP) services for life!

Services include:

- 24/7 Assistance via the Helpline
- Short-Term Individual & Marital Counseling
- Referrals to Community Resources & Support Groups
- Access to Online Articles, Tools, Tips & Resources
- Interactive Online Will Preparation
- Consultation with Attorneys & Financial Counselors to Discuss Legal/Financial Aspects of Retirement
- Assistance in Obtaining Medical, Financial, Legal or Aging Services.

Contact Deer Oaks EAP Services tollfree at 1-888-993-7650, by email: eap@deeroaks.com, or visit their website at www.deeroakseap.com (username/password: amarillo).

AFLAC

If you have an AFLAC policy through the City and have questions about your benefits, please contact AFLAC.

Name, Address and/or Beneficiary Changes

Provided below is the information you will need to change your address, name and/or beneficiaries.

Retired On/After January 1, 2024

- **Address Change**
 - These changes can be updated through Workday either through your computer or on the App. These changes are transferred electronically to the medical (includes prescription) and dental vendors except for employees enrolled in the TMRS retirement plan. See additional information on how to make these changes as shown below.
- **Name Change**
 - These changes can be updated through Workday either through your computer or on the App. Documentation for the name change will be required at time of request. These changes are transferred electronically to the medical (includes prescription) and dental vendors except for employees enrolled in the TMRS or AFRRF retirement plans and AFLAC. See additional information on how to make these changes by benefit plan as shown below.
- **Beneficiary Changes**
 - Retiree Life Insurance – Updated through Workday.
 - Nationwide 457 Deferred Compensation
 - Log into your account at www.nrsforu.com.
 - Beneficiary Change – Select “View Account” and Click on Beneficiaries. Click on “Manage Beneficiaries.” Select Primary and Secondary Beneficiaries where they both add up to 100%.
 - TMRS Retirement Plan – See information below on how to make a beneficiary change.
 - Amarillo Fireman Relief and Retirement Fund (AFRRF) – See information below on how to make a beneficiary change.
- **TMRS – Log into your account at www.tms.com or call TMRS Customer Service at 1-800-924-8677**
 - Address Change – Under Quick Links under Update, Click on “Contact Information” and Select “Edit”.
 - Name Change – Under Quick Links under TMRS Forms, Click on “Download Forms”, Click on “Commonly Used TMRS Forms”, Click on “Address or Name Change Form.” Fillable form pops up and fill out required fields. Print out and sign form. Fax or mail form per instructions at the top of the page.
 - Beneficiary Change – Under Quick Links under Update, Click on “Beneficiaries”, Click on “Update Retirement Beneficiaries.” Fill out the requested information.
- **Firefighters Only – Amarillo Fireman Relief and Retirement Fund (AFRRF)**
 - Name/Beneficiary Changes – Contact the Finance Department M-F, 8am to 5pm by either of the following methods:
 - Phone: 1-806-378-3040.
 - In Person at City Hall, 3rd Floor in Finance Department, Rm. 301.

Retired Prior to 2024

- **Address/Name Change**
 - Form obtained from the Benefits Department by request, using one of the following methods:
 - Email: Benefits@Amarillo.gov, Phone: 1-806-378-4235, or in Person M-F 8am to 5pm at City Hall, Rm. 104.
 - This will update medical, dental, retiree life insurance and the City's internal HRIS system (Workday).

- **Beneficiary Changes**
 - Retiree Life Insurance
 - Request a beneficiary form from the Benefits Department using one of the following methods: Email: Benefits@Amarillo.gov, Phone: 1-806-378-4235, or in Person at M-F 8am to 5pm at City Hall, Rm. 104.
 - When filling out the form, provide both primary and secondary beneficiaries where they both add up to 100%.
 - Nationwide 457 Deferred Compensation
 - Log into your account at www.nrsforu.com.
 - Beneficiary Change – Select “View Account” and Click on Beneficiaries. Click on “Manage Beneficiaries.” Select Primary and Secondary Beneficiaries where they both add up to 100%.
 - TMRS Retirement Plan – See information below on how to make a beneficiary change.
 - Amarillo Fireman Relief and Retirement Fund (AFRRF) – See information below on how to make a beneficiary change.

- **TMRS – Log into your account at www.tmr.com or call TMRS Customer Service at 1-800-924-8677**
 - Address Change – Under Quick Links under Update, Click on “Contact Information” and Select “Edit”.
 - Name Change – Under Quick Links under TMRS Forms, Click on “Download Forms”, Click on “Commonly Used TMRS Forms”, Click on “Address or Name Change Form.” Fillable form pops up and fill out required fields. Print out and sign form. Fax or mail form per instructions at the top of the page.
 - Beneficiary Change – Under Quick Links under Update, Click on “Beneficiaries”, Click on “Update Retirement Beneficiaries.” Fill out the requested information.

- **Firefighters Only – Amarillo Fireman Relief and Retirement Fund (AFRRF)**
 - Name/Beneficiary Changes – Contact the Finance Department M-F, 8am to 5pm by either of the following methods:
 - Phone: 1-806-378-3040.
 - In Person at City Hall, 3rd Floor in Finance Department, Rm. 301.

Health Coverage Notices

This brochure contains several legal notices that are required to be distributed to participants in group health plans sponsored by the City of Amarillo.

The notices included in this brochure are:

- **HIPPA Notice of Privacy Practices** explains how the City’s group health plans protect your personal medical information.
- **Medicare Part D Creditable Coverage Notice** provides information about how your current prescription drug coverage under the City of Amarillo’s health care plans is affected—and your options for coverage—when you become eligible for Medicare.
- **General Notice of COBRA Continuation Coverage Rights** explains when you and your family may be able to temporarily continue coverage under the City’s health plans if coverage would otherwise end for you.
- **Health Insurance Marketplace Coverage Options and Your Health Coverage** describes the Health Insurance Marketplace, eligibility and tax credit information.
- **Newborns’ Act Disclosure** that describes federal laws that govern benefits for hospital stays for mothers following the birth of child.
- **Women’s Health and Cancer Rights Act** that summarizes the benefits available under your medical plan if you have had or are going to have a mastectomy.
- **Notice of Special Enrollment Rights** that explains when you can enroll in the plan due to special circumstances.
- **Children’s Health Insurance Program (CHIP)** provides health coverage to eligible children, through both Medicaid and separate CHIP programs.

HIPPA Notice of Privacy Practices

This Notice Describes How Medical Information About You May Be Used And Disclosed And How You Can Get Access To This Information.

Our Company's Pledge to You

This notice is intended to inform you of the privacy practices followed by the *City of Amarillo* (the Plan) and the Plan's legal obligations regarding your protected health information under the Health Insurance Portability and Accountability Act of 1996 (HIPAA). The notice also explains the privacy rights you and your family members have as participants of the Plan. It is effective on **January 1, 2024**.

The Plan often needs access to your protected health information in order to provide payment for health services and perform plan administrative functions. We want to assure the participants covered under the Plan that we comply with federal privacy laws and respect your right to privacy. **The City** requires all members of our workforce and third parties that are provided access to protected health information to comply with the privacy practices outlined below.

Protected Health Information

Your protected health information is protected by the HIPAA Privacy Rule. Generally, protected health information is information that identifies an individual created or received by a health care provider, health plan or an employer on behalf of a group health plan that relates to physical or mental health conditions, provision of health care, or payment for health care, whether past, present or future.

How We May Use Your Protected Health Information

Under the HIPAA Privacy Rule, we may use or disclose your protected health information for certain purposes without your permission. This section describes the ways we can use and disclose your protected health information.

Payment. We use or disclose your protected health information without your written authorization in order to determine eligibility for benefits, seek reimbursement from a third party, or coordinate benefits with another health plan under which you are covered. For example, a health care provider that provided treatment to you will provide us with your health information. We use that information in order to determine whether those services are eligible for payment under our group health plan.

Health Care Operations. We use and disclose your protected health information in order to perform plan administration functions such as quality assurance activities, resolution of internal grievances, and evaluating plan performance. For example, we review claims experience in order to understand participant utilization and to make plan design changes that are intended to control health care costs.

However, we are prohibited from using or disclosing protected health information that is genetic information for our underwriting purposes.

Treatment. Although the law allows use and disclosure of your protected health information for purposes of treatment, as a health plan we generally do not need to disclose your information for treatment purposes. Your physician or health care provider is required to provide you with an explanation of how they use and share your health information for purposes of treatment, payment, and health care operations.

As permitted or required by law. We may also use or disclose your protected health information without your written authorization for other reasons as *permitted* by law. We are *permitted* by law to share information, subject to certain requirements, in order to communicate information on health-related benefits or services that may be of interest to you, respond to a court order, or provide information to further public health activities (e.g., preventing the spread of disease) without your written authorization. We are also permitted to share protected health information during a corporate restructuring such as a merger, sale, or acquisition. We will also disclose health information about you when *required* by law, for example, in order to prevent serious harm to you or others.

Pursuant to your Authorization. When required by law, we will ask for your written authorization before using or disclosing your protected health information. Uses and disclosures not described in this notice will only be made with your written authorization. Subject to some limited exceptions, your written authorization is required for the sale of protected health information and for the use or disclosure of protected health information for marketing purposes. If you choose to sign an authorization to disclose information, you can later revoke that authorization to prevent any future uses or disclosures.

To Business Associates. We may enter into contracts with entities known as Business Associates that provide services to or perform functions on behalf of the Plan. We may disclose protected health information to Business Associates once they have agreed in writing to safeguard the protected health information. For example, we may disclose your protected health information to a Business Associate to administer claims. Business Associates are also required by law to protect protected health information.

To the Plan Sponsor. We may disclose protected health information to certain employees of *the City* for the purpose of administering the Plan. These employees will use or disclose the protected health information only as necessary to perform plan administration functions or as otherwise required by HIPAA, unless you have authorized additional disclosures. Your protected health information cannot be used for employment purposes without your specific authorization.

Your Rights

Right to Inspect and Copy. In most cases, you have the right to inspect and copy the protected health information we maintain about you. If you request copies, we will charge you a reasonable fee to cover the costs of copying, mailing, or other expenses associated with your request. Your request to inspect or review your health information must be submitted in writing to the person listed below. In some circumstances, we may deny your request to inspect and copy your health information. To the extent your information is held in an electronic health record, you may be able to receive the information in an electronic format.

Right to Amend. If you believe that information within your records is incorrect or if important information is missing, you have the right to request that we correct the existing information or add the missing information. Your request to amend your health information must be submitted in writing to the person listed below. In some circumstances, we may deny your request to amend your health information. If we deny your request, you may file a statement of disagreement with us for inclusion in any future disclosures of the disputed information.

Right to an Accounting of Disclosures. You have the right to receive an accounting of certain disclosures of your protected health information. The accounting will not include disclosures that were made (1) for purposes of treatment, payment or health care operations; (2) to you; (3) pursuant to your authorization; (4) to your friends or family in your presence or because of an emergency; (5) for national security purposes; or (6) incidental to otherwise permissible disclosures.

Your request to for an accounting must be submitted in writing to the person listed below. You may request an accounting of disclosures made within the last six years. You may request one accounting free of charge within a 12-month period.

Right to Request Restrictions. You have the right to request that we not use or disclose information for treatment, payment, or other administrative purposes except when specifically authorized by you, when required by law, or in emergency circumstances. You also have the right to request that we limit the protected health information that we disclose to someone involved in your care or the payment for your care, such as a family member or friend. Your request for restrictions must be submitted in writing to the person listed below. We will consider your request, but in most cases are not legally obligated to agree to those restrictions.

Right to Request Confidential Communications. You have the right to receive confidential communications containing your health information. Your request for restrictions must be submitted in writing to the person listed below. We are required to accommodate reasonable requests. For example, you may ask that we contact you at your place of employment or send communications regarding treatment to an alternate address.

Right to be Notified of a Breach. You have the right to be notified in the event that we (or one of our Business Associates) discover a breach of your unsecured protected health information. Notice of any such breach will be made in accordance with federal requirements.

Right to Receive a Paper Copy of this Notice. If you have agreed to accept this notice electronically, you also have a right to obtain a paper copy of this notice from us upon request. To obtain a paper copy of this notice, please contact the person listed below.

Our Legal Responsibilities

We are required by law to maintain the privacy of your protected health information, provide you with this notice about our legal duties and privacy practices with respect to protected health information and notify affected individuals following a breach of unsecured protected health information.

We may change our policies at any time and reserve the right to make the change effective for all protective health information that we maintain. In the event that we make a significant change in our policies, we will provide you with a revised copy of this notice. You can also request a copy of our notice at any time. For more information about our privacy practices, contact the person listed below.

If you have any questions or complaints, please contact:

Name of Entity/Sender: City of Amarillo

Contact/Office: Benefits Department

Address: P.O. Box 1971, Amarillo, Texas 79105-1971

Phone Number: 1-806-378-4235

Complaints

If you are concerned that we have violated your privacy rights, or you disagree with a decision we made about access to your records, you may contact the person listed above. You also may send a written complaint to the U.S. Department of Health and Human Services — Office of Civil Rights. The person listed above can provide you with the appropriate address upon request or you may visit www.hhs.gov/ocr for further information. You will not be penalized or retaliated against for filing a complaint with the Office of Civil Rights or with us.

Medicare Part D Creditable Coverage Notice

Important Notice from the City of Amarillo About Your Prescription Drug Coverage and Medicare

Please read this notice carefully and keep it where you can find it. This notice has information about your current prescription drug coverage with the City of Amarillo (the "Plan Sponsor") and about your options under Medicare's prescription drug coverage. This information can help you decide whether you want to join a Medicare drug plan. If you are considering joining, you should compare your current coverage, including which drugs are covered at what cost, with the coverage and costs of the plans offering Medicare prescription drug coverage in your area. Information about where you can get help to make decisions about your prescription drug coverage is at the end of this notice.

There are two important things you need to know about your current coverage and Medicare's prescription drug coverage:

1. Medicare prescription drug coverage became available in 2006 to everyone with Medicare. You can get this coverage if you join a Medicare Prescription Drug Plan or join a Medicare Advantage Plan (like an HMO or PPO) that offers prescription drug coverage. All Medicare drug plans provide at least a standard level of coverage set by Medicare. Some plans may also offer more coverage for a higher monthly premium.
2. The City of Amarillo has determined that the prescription drug coverage offered by the City of Amarillo Group Health Plan is, on average for all plan participants, expected to pay out as much as standard Medicare prescription drug coverage pays and is therefore considered Creditable Coverage. Because your existing coverage is Creditable Coverage, you can keep this coverage and not pay a higher premium (a penalty) if you later decide to join a Medicare drug plan.

When Can You Join A Medicare Drug Plan?

You can join a Medicare drug plan when you first become eligible for Medicare and each year from October 15th to December 7th.

However, if you lose your current creditable prescription drug coverage, through no fault of your own, you will also be eligible for a two (2) month Special Enrollment Period (SEP) to join a Medicare drug plan.

What Happens To Your Current Coverage If You Decide to Join A Medicare Drug Plan?

If you decide to join a Medicare drug plan, your current City of Amarillo coverage will be affected. If you do decide to join a Medicare drug plan and drop your current City of Amarillo coverage, be aware that you and your dependents will not be able to get this coverage back.

When Will You Pay A Higher Premium (Penalty) To Join A Medicare Drug Plan?

You should also know that if you drop or lose your current coverage with the City and don't join a Medicare drug plan within 63 continuous days after your current coverage ends, you may pay a higher premium (a penalty) to join a Medicare drug plan later.

If you go 63 continuous days or longer without creditable prescription drug coverage, your monthly premium may go up by at least 1% of the Medicare base beneficiary premium per month for every month that you did not have that coverage. For example, if you go nineteen months without creditable coverage, your premium may consistently be at least 19% higher than the Medicare base beneficiary premium. You may have to pay this higher premium (a penalty) as long as you have Medicare prescription drug coverage. In addition, you may have to wait until the following October to join.

For More Information About This Notice Or Your Current Prescription Drug Coverage...

Contact the person listed on the following page for further information. **NOTE:** You'll get this notice each year. You will also get it before the next period you can join a Medicare drug plan, and if this coverage through the City of Amarillo changes. You also may request a copy of this notice at any time.

For More Information About Your Options Under Medicare Prescription Drug Coverage...

More detailed information about Medicare plans that offer prescription drug coverage is in the "Medicare & You" handbook. You'll get a copy of the handbook in the mail every year from Medicare. You may also be contacted directly by Medicare drug plans.

For more information about Medicare prescription drug coverage:

- Visit www.medicare.gov.
- Call your State Health Insurance Assistance Program (see the inside back cover of your copy of the "Medicare & You" handbook for their telephone number) for personalized help.
- Call 1-800-MEDICARE (1-800-633-4227). TTY users should call 1-877-486-2048.

If you have limited income and resources, extra help paying for Medicare prescription drug coverage is available. For information about this extra help, visit Social Security on the web at www.socialsecurity.gov, or call them at 1-800-772-1213 (TTY 1-800-325-0778).

Name of Entity/Sender: City of Amarillo
Contact/Office: Benefits Department
Address: P.O. Box 1971, Amarillo, Texas 79105-1971
Phone Number: 1-806-378-4235

Updated: April 1, 2011

Remember: Keep this Creditable Coverage notice. If you decide to join one of the Medicare drug plans, you may be required to provide a copy of this notice when you join to show whether or not you have maintained creditable coverage and, therefore, whether or not you are required to pay a higher premium (a penalty).

General Notice of COBRA Continuation Coverage Rights

Continuation Coverage Rights under COBRA

Introduction

You're getting this notice because you recently gained coverage under a group health plan (City of Amarillo). This notice has important information about your right to COBRA continuation coverage, which is a temporary extension of coverage under the Plan. **This notice explains COBRA continuation coverage, when it may become available to you and your family, and what you need to do to protect your right to get it.** When you become eligible for COBRA, you may also become eligible for other coverage options that may cost less than COBRA continuation coverage.

The right to COBRA continuation coverage was created by a federal law, the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA). COBRA continuation coverage can become available to you and other members of your family when group health coverage would otherwise end. For more information about your rights and obligations under the Plan and under federal law, you should review the Plan's Summary Plan Description or contact the Plan Administrator.

You may have other options available to you when you lose group health coverage. For example, you may be eligible to buy an individual plan through the Health Insurance Marketplace. By enrolling in coverage through the Marketplace, you may qualify for lower costs on your monthly premiums and lower out-of-pocket costs. Additionally, you may qualify for a 30-day special enrollment period for another group health plan for which you are eligible (such as a spouse's plan), even if that plan generally doesn't accept late enrollees.

What is COBRA Continuation Coverage?

COBRA continuation coverage is a continuation of Plan coverage when it would otherwise end because of a life event. This is also called a "qualifying event." Specific qualifying events are listed later in this notice. After a qualifying event, COBRA continuation coverage must be offered to each person who is a "qualified beneficiary." You, your spouse, and your dependent children could become qualified beneficiaries if coverage under the Plan is lost because of the qualifying event. Under the Plan, qualified beneficiaries who elect COBRA continuation coverage must pay for COBRA continuation coverage.

If you're an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your hours of employment are reduced; or
- Your employment ends for any reason other than your gross misconduct.

If you're the spouse of an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your spouse dies;
- Your spouse's hours of employment are reduced;
- Your spouse's employment ends for any reason other than his or her gross misconduct;
- Your spouse becomes entitled to Medicare benefits (under Part A, Part B, or both); or
- You become divorced or legally separated from your spouse.

If you're dependent children will become qualified beneficiaries if they lose coverage under the Plan because of the following qualifying events:

- The parent-employee dies;
- The parent-employee's hours of employment are reduced;
- The parent-employee's employment ends for any reason other than his or her gross misconduct;
- The parent-employee becomes entitled to Medicare benefits (Part A, Part B, or both);
- The parents become divorced or legally separated; or
- The child stops being eligible for coverage under the Plan as a "dependent child."

Sometimes, filing a proceeding in bankruptcy under Title 11 of the United States Code can be a qualifying event. If a proceeding in bankruptcy is filed with respect to the City of Amarillo, and that bankruptcy results in the loss of coverage of any retired employee covered under the Plan, the retired employee will become a qualified beneficiary. The retired employee's spouse, surviving spouse, and dependent children will also become qualified beneficiaries if bankruptcy results in the loss of their coverage under the Plan.

When is COBRA Continuation Coverage Available?

The Plan will offer COBRA continuation coverage to qualified beneficiaries only after the Plan Administrator has been notified that a qualifying event has occurred. The employer must notify the Plan Administrator of the following qualifying events:

- The end of employment or reduction of hours of employment;
- Death of the employee;
- Commencement of a proceeding in bankruptcy with respect to the employer; or
- The employee's becoming entitled to Medicare benefits (under Part A, Part B, or both).

For all other qualifying events (divorce or legal separation of the employee and spouse or a dependent child's losing eligibility for coverage as a dependent child), you must notify the Plan Administrator at 806-378-4235 within 60 days after the qualifying event occurs. You must provide this notice to the Benefits Department with required documentation.

How is COBRA Continuation Coverage Provided?

Once the Plan Administrator receives notice that a qualifying event has occurred, COBRA continuation coverage will be offered to each of the qualified beneficiaries. Each qualified beneficiary will have an independent right to elect COBRA continuation coverage. Covered employees may elect COBRA continuation coverage on behalf of their spouses, and parents may elect COBRA continuation coverage on behalf of their children.

COBRA continuation coverage is a temporary continuation of coverage that generally lasts for 18 months due to employment termination or reduction of hours of work. Certain qualifying events, or a second qualifying event during the initial period of coverage, may permit a beneficiary to receive a maximum of 36 months of coverage.

There are also ways in which this 18-month period of COBRA continuation coverage can be extended:

Disability Extension of 18-Month Period of Continuation Coverage

If you or anyone in your family covered under the Plan is determined by Social Security to be disabled and you notify the Plan Administrator in a timely fashion, you and your entire family may be entitled to get up to an additional 11 months of COBRA continuation coverage, for a maximum of 29 months. The disability would have to have started at some time before the 60th day of COBRA continuation coverage and must last at least until the end of the 18-month period of COBRA continuation coverage.

Second Qualifying Event Extension of 18-Month Period of Continuation Coverage

If your family experiences another qualifying event during the 18 months of COBRA continuation coverage, the spouse and dependent children in your family can get up to 18 additional months of COBRA continuation coverage, for a maximum of 36 months, if the Plan is properly notified about the second qualifying event. This extension may be available to the spouse and any dependent children getting COBRA continuation coverage if the employee or former employee dies; becomes entitled to Medicare benefits (under Part A, Part B, or both); gets divorced or legally separated; or if the dependent child stops being eligible under the Plan as a dependent child. This extension is only available if the second qualifying event would have caused the spouse or dependent child to lose coverage under the Plan had the first qualifying event not occurred.

Are There Other Coverage Options Besides COBRA Continuation Coverage?

Yes. Instead of enrolling in COBRA continuation coverage, there may be other coverage options for you and your family through the Health Insurance Marketplace, Medicaid, or other group health plan coverage options (such as a spouse's plan) through what is called a "special enrollment period." Some of these options may cost less than COBRA continuation coverage. You can learn more about many of these options at www.healthcare.gov.

If You Have Questions

Questions concerning your Plan or your COBRA continuation coverage rights should be addressed to the contact or contacts identified below. For more information about your rights under the Employee Retirement Income Security Act (ERISA), including COBRA, the Patient Protection and Affordable Care Act, and other laws affecting group health plans, contact the nearest Regional or District Office of the U.S. Department of Labor's Employee Benefits Security Administration (EBSA) in your area or visit www.dol.gov/ebsa. (Addresses and phone numbers of Regional and District EBSA Offices are available through EBSA's website.) For more information about the Marketplace, visit www.healthcare.gov.

Keep Your Plan Informed of Address Changes

To protect your family's rights, let the Plan Administrator know about any changes in the addresses of family members. You should also keep a copy, for your records, of any notices you send to the Plan Administrator.

Plan Contact Information: If you have any questions about COBRA continuation coverage, call the City of Amarillo Benefits Department at 806-378-4235.

Health Insurance Marketplace Coverage Options and Your Health Coverage

PART A: General Information

Since key parts of the health care law took effect in 2014, there is another way to buy health insurance: the Health Insurance Marketplace. To assist you as you evaluate options for you and your family, this notice provides some basic information about the Marketplace and employment-based health coverage offered by your employer.

What is the Health Insurance Marketplace?

The Marketplace is designed to help you find health insurance that meets your needs and fits your budget. The Marketplace offers "one-stop shopping" to find and compare private health insurance options. You may also be eligible for a tax credit that lowers your monthly premium right away. Typically, you can enroll in a Marketplace health plan during the Marketplace's annual Open Enrollment period with coverage starting the 1st of January of the following calendar year or if you experience a qualifying life event.

Can I Save Money on my Health Insurance Premiums in the Marketplace?

You may qualify to save money and lower your monthly premium, but only if your employer does not offer coverage, or offers coverage that doesn't meet certain standards. The savings on your premium that you're eligible for depends on your household income.

Does Employer Health Coverage Affect Eligibility for Premium Savings through the Marketplace?

Yes, if you have an offer of health coverage from your employer that meets certain standards, you will not be eligible for a tax credit through the Marketplace and may wish to enroll in your employer's health plan. However, you may be eligible for a tax credit that lowers your monthly premium or a reduction in certain cost-sharing if your employer does not offer coverage to you at all or does not offer coverage that meets certain standards. If the cost of a plan from your employer that would cover you (and not any other members of your family) is more than 9.5% of your household income for the year, or if the coverage your employer provides does not meet the "minimum value" standard set by the Affordable Care Act, you may be eligible for a tax credit.

Note: If you purchase a health plan through the Marketplace instead of accepting health coverage offered by your employer, then you may lose the employer contribution (if any) to the employer-offered coverage. Also, this employer contribution -as well as your employee contribution to employer-offered coverage- is often excluded from income for Federal and State income tax purposes. Your payments for coverage through the Marketplace are made on an after-tax basis.¹

How Can I Get More Information?

For more information about your coverage offered by your employer, please check your Summary Plan Description or contact City of Amarillo Benefits Manager at 601 S. Buchanan Street, Amarillo, TX 79105-1971 or by phone 1-806-378-9379.

The Marketplace can help you evaluate your coverage options, including your eligibility for coverage through the Marketplace and its cost. Please visit HealthCare.gov for more information, including an online application for health insurance coverage and contact information for a Health Insurance Marketplace in your area.

¹An employer-sponsored health plan meets the "minimum value standard" if the plan's share of the total allowed benefit costs covered by the plan is no less than 60 percent of such costs.

PART B: Information About Health Coverage Offered by Your Employer

This section contains information about any health coverage offered by your employer. If you decide to complete an application for coverage in the Marketplace, you will be asked to provide this information. This information is numbered to correspond to the Marketplace application.

3. Employer Name City of Amarillo	4. Employer Identification Number (EIN) 75-6000444
5. Employer address, 7. City, 8. State, 9. Zip Code 601 S. Buchanan Street, Amarillo, TX 79105-1971	6. Employer Phone Number (806) 378-4235
10. Who can we contact about employee health coverage at this job? Benefits Manager	
11. Phone Number (if different from above) (806) 378-9379	12. email address Benefits@amarillo.gov

Here is some basic information about health coverage offered by this employer:

- As your employer, we offer a health plan to:
 - All employees. Eligible employees are:
 - Some employees. Eligible employees are:

- With respect to dependents:
 - We do offer coverage.
- If checked, this coverage meets the minimum value standard, and the cost of this coverage to you is intended to be affordable, based on employee wages.

Even if your employer intends your coverage to be affordable, you may still be eligible for a premium discount through the Marketplace. The Marketplace will use your household income, along with other factors, to determine whether you may be eligible for a premium discount. If, for example, your wages vary from week to week (perhaps you are an hourly employee or you work on a commission basis), if you are newly employed mid-year, or if you have other income losses, you may still qualify for a premium discount.

OMB Control Number 1210-0149 (expires 11/30/2023)

Other Notices

Newborns' Act Disclosure

Group health plans and health insurance issuers generally may not, under Federal law, restrict benefits for any hospital length of stay in connection with childbirth for the mother or newborn child to less than 48 hours following a vaginal delivery, or less than 96 hours following a cesarean section. However, Federal Law generally does not prohibit the mother's or newborn's attending provider, after consulting with the mother, from discharging the mother or her newborn earlier than 48 hours (or 96 hours as applicable). In any case, plans and issuers may not, under Federal law, require that a provider obtain authorization from the plan or the insurance issuer for prescribing a length of stay not in excess of 48 hours (or 96 hours).

Women's Health and Cancer Rights Act (WHCRA)

Do you know that your plan, as required by the Women's Health and Cancer Right Act of 1998, provides benefits for mastectomy-related services, including all stages of reconstruction and surgery to achieve symmetry between the breasts, prostheses and treatment for complications resulting from a mastectomy, including lymphedema? Call your Plan Administrator at 1-806-378-4235 for more information.

Notice of Special Enrollment Rights

If you are declining enrollment for yourself or your dependents (including your spouse) because of other health insurance or group health plan coverage, you may be able to enroll yourself and your dependents in this plan if you or your dependents lose eligibility for that other coverage (or if the employer stops contributing toward your or your dependents' other coverage). However, you must request enrollment within **31 calendar days** after your dependent's other coverage ends (or after the employer stops contributing toward the other coverage).

In addition, if you have a new dependent as a result of marriage, birth, adoption, or placement for adoption, you may be able to enroll yourself and your dependents. However, you must request enrollment no later than 31 calendar days after the marriage, birth, adoption, or placement for adoption.

Effective April 1, 2009, if either of the following two events occur, you will have **60 days after the date of the event** to request enrollment in your employer's plan:

- Your dependents lose Medicaid or CHIP coverage because they are no longer eligible.
- Your dependents become eligible for a state's premium assistance program.

To take advantage of special enrollment rights, you must experience a qualifying event and provide the City of Amarillo's Benefits Department with timely notice of the event and your enrollment request.

To request special enrollment or obtain more information, contact the City of Amarillo's Benefits Department at 1-806-378-4235.

CHIP NOTICE

Premium Assistance Under Medicaid and the Children's Health Insurance Program (CHIP)

If you or your children are eligible for Medicaid or CHIP and you're eligible for health coverage from your employer, your state may have a premium assistance program that can help pay for coverage, using funds from their Medicaid or CHIP programs. If you or your children aren't eligible for Medicaid or CHIP, you won't be eligible for these premium assistance programs but you may be able to buy individual insurance coverage through the Health Insurance Marketplace. For more information, visit www.healthcare.gov.

If you or your dependents are already enrolled in Medicaid or CHIP and you live in a State listed below, contact your State Medicaid or CHIP office to find out if premium assistance is available.

If you or your dependents are NOT currently enrolled in Medicaid or CHIP, and you think you or any of your dependents might be eligible for either of these programs, contact your State Medicaid or CHIP office or dial **1-877-KIDS NOW** or www.insurekidsnow.gov to find out how to apply. If you qualify, ask your state if it has a program that might help you pay the premiums for an employer-sponsored plan.

If you or your dependents are eligible for premium assistance under Medicaid or CHIP, as well as eligible under your employer plan, your employer must allow you to enroll in your employer plan if you aren't already enrolled. This is called a "special enrollment" opportunity, and **you must request coverage within 60 days of being determined eligible for premium assistance**. If you have questions about enrolling in your employer plan, contact the Department of Labor at www.askebsa.dol.gov or call **1-866-444-EBSA (3272)**.

If you live in one of the following states, you may be eligible for assistance paying your employer health plan premiums. The following list of states is current as of October 15, 2021. Contact your State for more information on eligibility –

<p style="text-align: center;">ALABAMA – Medicaid</p> <p>Website: http://myalhipp.com/ Phone: 1-855-692-5447</p>	<p style="text-align: center;">ALASKA – Medicaid</p> <p>The AK Health Insurance Premium Payment Program Website: http://mvakhipp.com/ Phone: 1-866-251-4861 Email: CustomerService@MyAKHIPP.com Medicaid Eligibility: https://health.alaska.gov/dpa/Pages/default.aspx</p>
<p style="text-align: center;">ARKANSAS – Medicaid</p> <p>Website: http://myarhipp.com/ Phone: 1-855-MyARHIPP (855-692-7447)</p>	<p style="text-align: center;">CALIFORNIA – Medicaid</p> <p>Health Insurance Premium Payment (HIPP) Program Website: http://dhcs.ca.gov/hipp Phone: 916-445-8322 Fax: 916-440-5676 Email: hipp@dhcs.ca.gov</p>
<p style="text-align: center;">COLORADO – Health First Colorado (Colorado's Medicaid Program) & Child Health Plan Plus (CHP+)</p> <p>Health First Colorado Website: https://www.healthfirstcolorado.com/ Health First Colorado Member Contact Center: 1-800-221-3943/State Relay 711 CHP+: https://hepf.colorado.gov/child-health-plan-plus CHP+ Customer Service: 1-800-359-1991/State Relay 711 Health Insurance Buy-In Program (HIBI): https://www.mycohibi.com/ HIBI Customer Service: 1-855-692-6442</p>	<p style="text-align: center;">FLORIDA – Medicaid</p> <p>Website: https://www.flmedicaidprecovery.com/flmedicaidprecovery.com/hipp/index.html Phone: 1-877-357-3268</p>

<p align="center">GEORGIA – Medicaid</p> <p>GA HIPP Website: https://medicaid.georgia.gov/health-insurance-premium-payment-program-hipp Phone: 678-564-1162, Press 1 GA CHIPRA Website: https://medicaid.georgia.gov/programs/third-party-liability/childrens-health-insurance-program-reauthorization-act-2009-chipra Phone: 678-564-1162, Press 2</p>	<p align="center">INDIANA – Medicaid</p> <p>Healthy Indiana Plan for low-income adults 19-64 Website: http://www.in.gov/fssa/hip/ Phone: 1-877-438-4479 All other Medicaid Website: https://www.in.gov/medicaid/ Phone: 1-800-457-4584</p>
<p align="center">IOWA – Medicaid and CHIP (Hawki)</p> <p>Medicaid Website: https://dhs.iowa.gov/ime/members Medicaid Phone: 1-800-338-8366 Hawki Website: http://dhs.iowa.gov/Hawki Hawki Phone: 1-800-257-8563 HIPP Website: https://dhs.iowa.gov/ime/members/medicaid-a-to-z/hipp HIPP Phone: 1-888-346-9562</p>	<p align="center">KANSAS – Medicaid</p> <p>Website: https://www.kancare.ks.gov/ Phone: 1-800-792-4884 HIPP Phone: 1-800-967-4660</p>
<p align="center">KENTUCKY – Medicaid</p> <p>Kentucky Integrated Health Insurance Premium Payment Program (KI-HIPP) Website: https://chfs.ky.gov/agencies/dms/member/Pages/kihipp.aspx Phone: 1-855-459-6328 Email: KIHIPPPROGRAM@ky.gov KCHIP Website: https://kidshealth.ky.gov/Pages/index.aspx Phone: 1-877-524-4718 Kentucky Medicaid Website: https://chfs.ky.gov/agencies/dms</p>	<p align="center">LOUISIANA – Medicaid</p> <p>Website: www.medicare.la.gov or www.ldh.la.gov/lahipp Phone: 1-888-342-6207 (Medicaid hotline) or 1-855-618-5488 (LaHIPP)</p>
<p align="center">MAINE – Medicaid</p> <p>Enrollment Website: https://www.mymaineconnection.gov/benefits/s/?language=en_US Phone: 1-800-442-6003 TTY: Maine relay 711 Private Health Insurance Premium Webpage: https://www.maine.gov/dhhs/ofi/applications-forms Phone: 1-800-977-6740 TTY: Maine relay 711</p>	<p align="center">MASSACHUSETTS – Medicaid and CHIP</p> <p>Website: https://www.mass.gov/masshealth/pa Phone: 1-800-862-4840 TTY: 711 Email: masspremassistance@accenture.com</p>
<p align="center">MINNESOTA – Medicaid</p> <p>Website: https://mn.gov/dhs/people-we-serve/children-and-families/health-care/health-care-programs/programs-and-services/other-insurance.jsp Phone: 1-800-657-3739</p>	<p align="center">MISSOURI – Medicaid</p> <p>Website: http://www.dss.mo.gov/mhd/participants/pages/hipp.htm Phone: 573-751-2005</p>

<p align="center">MONTANA – Medicaid</p> <p>Website: http://dphhs.mt.gov/MontanaHealthcarePrograms/HIPP Phone: 1-800-694-3084 Email: HSHIPPProgram@mt.gov</p>	<p align="center">NEBRASKA – Medicaid</p> <p>Website: http://www.ACCESSNebraska.ne.gov Phone: 1-855-632-7633 Lincoln: 402-473-7000 Omaha: 402-595-1178</p>
<p align="center">NEVADA – Medicaid</p> <p>Medicaid Website: http://dhcfp.nv.gov Medicaid Phone: 1-800-992-0900</p>	<p align="center">NEW HAMPSHIRE – Medicaid</p> <p>Website: https://www.dhhs.nh.gov/programs-services/medicaid/health-insurance-premium-program Phone: 603-271-5218 Toll free number for the HIPP program: 1-800-852-3345, ext. 5218</p>
<p align="center">NEW JERSEY – Medicaid and CHIP</p> <p>Medicaid Website: http://www.state.nj.us/humanservices/dmahs/clients/medicaid/ Medicaid Phone: 609-631-2392 CHIP Website: http://www.njfamilycare.org/index.html CHIP Phone: 1-800-701-0710</p>	<p align="center">NEW YORK – Medicaid</p> <p>Website: https://www.health.ny.gov/health_care/medicaid/ Phone: 1-800-541-2831</p>
<p align="center">NORTH CAROLINA – Medicaid</p> <p>Website: https://medicaid.ncdhhs.gov/ Phone: 919-855-4100</p>	<p align="center">NORTH DAKOTA – Medicaid</p> <p>Website: https://www.hhs.nd.gov/healthcare Phone: 1-844-854-4825</p>
<p align="center">OKLAHOMA – Medicaid and CHIP</p> <p>Website: http://www.insureoklahoma.org Phone: 1-888-365-3742</p>	<p align="center">OREGON – Medicaid</p> <p>Website: http://healthcare.oregon.gov/Pages/index.aspx Phone: 1-800-699-9075</p>
<p align="center">PENNSYLVANIA – Medicaid and CHIP</p> <p>Website: https://www.dhs.pa.gov/Services/Assistance/Pages/HIPP-Program.aspx Phone: 1-800-692-7462 CHIP Website: Children's Health Insurance Program (CHIP) (pa.gov) CHIP Phone: 1-800-986-KIDS (5437)</p>	<p align="center">RHODE ISLAND – Medicaid and CHIP</p> <p>Website: http://www.cohhs.ri.gov/ Phone: 1-855-697-4347, or 401-462-0311 (Direct RItE Share Line)</p>
<p align="center">SOUTH CAROLINA – Medicaid</p> <p>Website: https://www.scdhhs.gov Phone: 1-888-549-0820</p>	<p align="center">SOUTH DAKOTA - Medicaid</p> <p>Website: http://dss.sd.gov Phone: 1-888-828-0059</p>
<p align="center">TEXAS – Medicaid</p> <p>Website: Health Insurance Premium Payment (HIPP) Program Texas Health and Human Services Phone: 1-800-440-0493</p>	<p align="center">UTAH – Medicaid and CHIP</p> <p>Medicaid Website: https://medicaid.utah.gov/ CHIP Website: http://health.utah.gov/chip Phone: 1-877-543-7669</p>

<p align="center">VERMONT– Medicaid</p> <p>Website: Health Insurance Premium Payment (HIPP) Program Department of Vermont Health Access Phone: 1-800-250-8427</p>	<p align="center">VIRGINIA – Medicaid and CHIP</p> <p>Website: https://coverva.dmas.virginia.gov/learn/premium-assistance/famis-select https://coverva.dmas.virginia.gov/learn/premium-assistance/health-insurance-premium-payment-hipp-programs Medicaid/CHIP Phone: 1-800-432-5924</p>
<p align="center">WASHINGTON – Medicaid</p> <p>Website: https://www.hca.wa.gov/ Phone: 1-800-562-3022</p>	<p align="center">WEST VIRGINIA – Medicaid and CHIP</p> <p>Website: https://dhhr.wv.gov/bms/ http://mywvhipp.com/ Medicaid Phone: 304-558-1700 CHIP Toll-free phone: 1-855-MyWVHIPP (1-855-699-8447)</p>
<p align="center">WISCONSIN – Medicaid and CHIP</p> <p>Website: https://www.dhs.wisconsin.gov/badgercareplus/p-10095.htm Phone: 1-800-362-3002</p>	<p align="center">WYOMING – Medicaid</p> <p>Website: https://health.wyo.gov/healthcarefin/medicaid/programs-and-eligibility/ Phone: 1-800-251-1269</p>

To see if any other states have added a premium assistance program since January 31, 2021, or for more information on special enrollment rights, contact either:

**U.S. Department of Labor
Employee Benefits Security Administration**
www.dol.gov/agencies/ebsa
1-866-444-EBSA (3272)

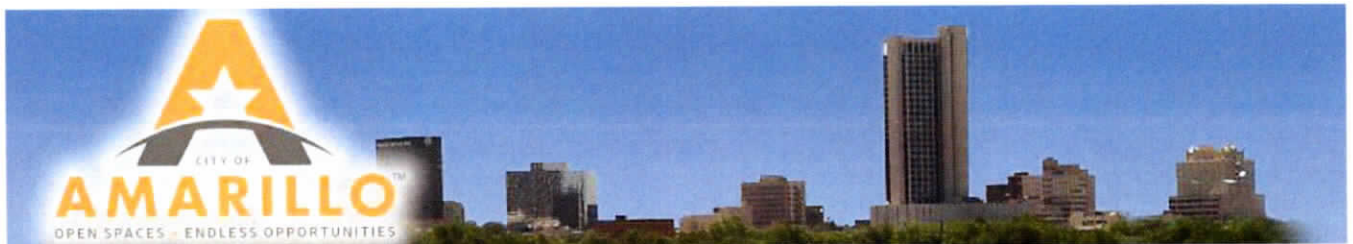
**U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services**
www.cms.hhs.gov
1-877-267-2323, Menu Option 4, Ext. 61565

Paperwork Reduction Act Statement

According to the Paperwork Reduction Act of 1995 (Pub. L. 104-13) (PRA), no persons are required to respond to a collection of information unless such collection displays a valid Office of Management and Budget (OMB) control number. The Department notes that a Federal agency cannot conduct or sponsor a collection of information unless it is approved by OMB under the PRA, and displays a currently valid OMB control number, and the public is not required to respond to a collection of information unless it displays a currently valid OMB control number. See 44 U.S.C. 3507. Also, notwithstanding any other provisions of law, no person shall be subject to penalty for failing to comply with a collection of information if the collection of information does not display a currently valid OMB control number. See 44 U.S.C. 3512.

The public reporting burden for this collection of information is estimated to average approximately seven minutes per respondent. Interested parties are encouraged to send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, Employee Benefits Security Administration, Office of Policy and Research, Attention: PRA Clearance Officer, 200 Constitution Avenue, N.W., Room N-5718, Washington, DC 20210 or email ebsa.opr@dol.gov and reference the OMB Control Number 1210-0137.

OMB Control Number 1210-0137 (expires 1/31/2026)



Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, February 1, 2024 4:42 PM
To: edward.williams@bakertilly.com
Cc: Karen.Edwards@bakertilly.com
Subject: FW: Signed Letter of Agreement - City of Amarillo

Here is the last bit of information for you. Happy Thursday to both of you as well!

Thanks,
Stephanie

From: Storrs, Laura <Laura.Storrs@amarillo.gov>
Sent: Thursday, February 1, 2024 4:24 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

Sorry for the delay:

The City of Amarillo has a AAA rating on its General Obligation bonds, a AA+ rating on its Water and Sewer revenue bonds and on its Drainage revenue bonds, and a A+ on its Hotel Occupancy Tax bonds, all of which are issued from Standard and Poor's.

Laura

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Monday, January 29, 2024 3:18 PM
To: Schupbach, Jordan <Jordan.Schupbach@amarillo.gov>
Cc: Storrs, Laura <Laura.Storrs@amarillo.gov>
Subject: FW: Signed Letter of Agreement - City of Amarillo

Jordan,

Can you or someone from your team help provide me with the information requested for #16 and #17 below?

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

1. Organizational charts (titles only).
2. Current FY City of Amarillo budget.
3. # of City Employees FTEs? Part Time?
4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
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11. Current and prior city manager employment agreement?
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Please upload the pictures securely by clicking the below link. Make sure to enter City of Amarillo "Company":

<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

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Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

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Disclaimer

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, February 1, 2024 4:59 PM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Thank you!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: FW: Signed Letter of Agreement - City of Amarillo

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City of Amarillo
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4. # of City of Amarillo employees represented by unions, if applicable

5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
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<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
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2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

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Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Friday, February 2, 2024 9:38 AM
To: edward.williams@bakertilly.com
Cc: Karen.Edwards@bakertilly.com
Subject: FW: 2024 Benefits Guide
Attachments: 2024 Active COA FT Benefits Guide FINAL .pdf

Good morning Edward,

Please use this benefits guide – it's the latest and greatest.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

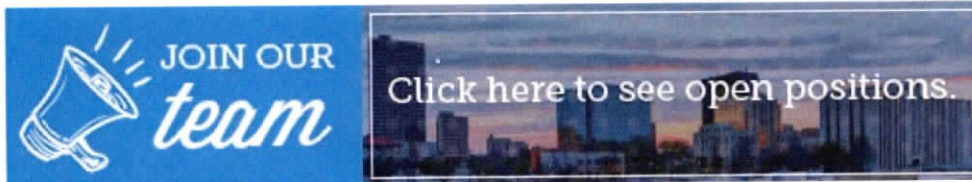
From: Ester, Brandon <Brandon.Ester@amarillo.gov>
Sent: Friday, February 2, 2024 9:24 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: 2024 Benefits Guide

Good morning,

Mitch wanted me to send you the final 2024 Benefits guide to make sure that you received the latest version. Please let me know if you need anything else.

Thank you,

Brandon Ester
Assistant Director of HR
City of Amarillo
Phone 806-378-6224
Email Brandon.Ester@amarillo.gov



<http://careers.amarillo.gov>



City of Amarillo Full-Time Employees 2024 Benefits Guide



This guide highlights the main features of many of the benefit plans sponsored by the City of Amarillo. Full details of these plans are contained in the legal documents governing the plans. If there is any discrepancy between the plan documents and the information described here, the plan documents will govern. In all cases, the plan documents are the exclusive source for determining rights and benefits under the plans. Participation in the plans does not constitute an employment contract. The City reserves the right to modify, amend or terminate any benefit plan or practice described in this guide. Nothing in this guide guarantees that any new plan provisions will continue in effect for any period of time. If you would like a copy of the Summary Plan Descriptions (SPDs), please contact the City of Amarillo Benefits Office at 1-806-378-4235.

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Benefit Contacts

Resource	Phone in CST/Web Address
City of Amarillo Benefits Department City Hall, 601 S. Buchanan Street, Rm. 104	806-378-4235 (M-F, 8am to 5pm) Benefits@amarillo.gov
Medical – Aetna (Group #737475)	800-410-2386 (M-F, 7am to 7pm) – General Questions 855-TELADOC (24/7) or Teladoc App 800-556-1555 – Aetna 24-Hour Nurse Line www.Aetna.com or Aetna App (Text “AETNA” to 90156 to receive a link to download the Aetna Health App)
Prescription Plan – MaxorPlus Pharmacy	800-687-8629 – General Questions (24/7) 866-629-6779 – MaxorPlus Specialty (24/7) www.maxorplus.com or MaxorPlus App
Dental - MetLife (Group #126985)	800-942-0854 – General Questions 877-963-8932 – MyBenefits IT Support (M-F, 7am to 10pm/ Voice Response Unit, extended weekday hours and Saturdays) www.metlife.com/mybenefits or MetLife App (search “MetLife”)
Vision – The Standard Insurance Company through EyeMed (Policy #160-646089-1)	866-289-0614 (M-Sat 7am to 10pm; Sun 10am to 7pm) https://www.eyemedvisioncare.com/member/public/login.emvc
Life Insurance and Voluntary Long-Term Disability - The Standard Insurance Company (Group #646089)	888-937-4783 – General Questions (M-F, 7am to 7pm) Life Claims: 800-628-8600 / LTD Claims: 800-368-1135 800-378-4668 – Portability/Conversion Questions www.standard.com EOI link: https://myeoi.standard.com/646089 (Policy Number: 646089 required when logging in for EOI.)
Flexible Spending Accounts – ASI Flex (Plan Number 501)	800-659-3035 (M-F 7am to 7pm; Sat 9am to 1pm) ASIFlex.com or ASIFlex App
Pension Plan - TMRS (City of Amarillo Plan #00030)	800-924-8677 (M-F, 8am to 5pm) www.tmr.com or TMRS App
Pension Plan - Amarillo Fireman’s Relief and Retirement Fund (AFRRF)	806-378-3040 Finance Department (M-F, 8am to 5pm) City Hall, Rm. 301.
457 Deferred Compensation – Nationwide (Plan #0038510001)	877-677-3678 – Customer Service (M-F, 7am to 10pm; Sat 8am to 5pm) www.nrsforu.com or Nationwide App Enroll by Text to 877697 and type in Ready. Jim Hammock, Lubbock Nationwide Representative 806-441-6069 (M-F, 8am to 5pm) Email: hammj25@nationwide.com
Employee Assistance Plan (EAP) – Deer Oaks EAP Services	888-993-7650 (24/7) or iConnectYou App (Passcode is 131997) www.deeroakseap.com (Username & Password – Amarillo)
Voluntary Insurance Products - AFLAC	806-418-8881 (M-F, 8am to 5pm) aflac.com/myaflac or MyAflac App

Benefits Overview

When Coverage Begins:

On the first day of employment, regular, full-time employees working 40 hours per week are eligible to enroll themselves and their eligible dependents in the medical (includes prescription), dental, vision and life insurance plans.

Eligible dependents under the medical, dental, vision and life insurance plans include:

- Your legal spouse (legally married includes opposite and same sex)
- Texas Common Law Spouse (includes opposite and same sex)
- Child(ren) up to the age of 26, defined as your natural children, stepchildren, legally adopted children, foster children, children for whom you are the court-appointed guardian, physically or mentally disabled children of any age who are incapable of self-support where proof of disability is required or grandchildren in your court-ordered custody.

Benefit Changes – Qualifying Life Event (QLE)/ Open Enrollment:

Qualifying Life Event

To make changes to your benefit elections, you must make enrollment changes **within 31 calendar days from the effective date of the qualifying life event**. Some examples of qualifying life events include:

- Changes in Household – Having a baby or adopting a child, getting married or divorced, or a death in the family.
- Loss of Health Coverage – Losing existing health coverage, losing eligibility for Medicare, Medicaid or CHIP, or turning 26 and losing coverage through a parent's plan.

Any changes to your benefits because of a qualifying life event will need to be completed **within 31 calendar days from the qualifying life event** including providing the required documentation related to the change. If changes are not submitted on time, you must wait until the next Open Enrollment period to make your election changes.

Open Enrollment

Open Enrollment will be held each year in October/November with an effective date of January 1st of the following calendar year for any changes made during the Open Enrollment window.

2024 Healthcare Insurance Employee Premiums (Per Pay Period)

MEDICAL PREMIUMS

Medical Plan 1	Medical Plan 2
Employee Only - \$26.34	Employee Only - \$28.97
Employee and Spouse - \$84.44	Employee and Spouse - \$101.32
Employee and Child(ren) - \$71.46	Employee and Child(ren) - \$85.75
Employee and Family - \$134.86	Employee and Family - \$161.83

DENTAL PREMIUMS

Dental Plan 1	Dental Plan 2
Employee Only - \$18.44	Employee Only - \$20.29
Employee and Spouse - \$34.77	Employee and Spouse - \$38.26
Employee and Child(ren) - \$32.46	Employee and Child(ren) - \$35.71
Employee and Family - \$48.68	Employee and Family - \$53.55

VISION PREMIUMS

Vision Plan
Employee Only - \$2.76
Employee and Spouse - \$5.16
Employee and Child(ren) - \$5.23
Employee and Family - \$8.08

Medical Plans

The Medical Plans are an Exclusive Provider Organization (EPO) through Aetna and it offers you access to a broad network of in-network providers and facilities. The medical plan will only provide coverage for in-network services. Out-of-network services “will not” be covered under the medical plan. However, in emergency situations out-of-network services may be covered under the medical plan. Note: Outside the local Amarillo area there is a nationwide network through Aetna where you can seek care from other in-network providers and facilities.

In the local Amarillo area, the in-network hospital/facilities you can use is through Northwest Texas Hospital. Services performed at BSA hospital/facilities are out-of-network and will not be covered under the medical plan.

Locate in-network providers/facilities at www.Aetna.com or through the Aetna Health App (Text “AETNA” to 90156 to receive a link to download the Aetna Health App). First time users must set up and register an account through the Aetna site or App. Once registered, you can locate in-network providers/facilities locally or nationwide. You must log into your account every time to locate in-network facilities/providers. Aetna customer service representatives are also available to assist with in-network searches and their number is located on your Aetna card.

A medical card with prescription information on the back of the card is mailed to your home address on file for new hires and replacement cards can be requested by contacting Aetna customer service.

Summary of Medical Plan Coverage:

MEDICAL PLAN 1	
FEATURES	IN-NETWORK
Deductible (per calendar year)	\$1,500 Individual \$3,000 Family
Out-of-Pocket Limit (per calendar year) Includes deductible, coinsurance, and prescription co-pays	\$5,000 Individual \$10,000 Family
Out-of-Network Coverage	None , except for emergencies
PREVENTIVE CARE	IN-NETWORK
Routine Adult Physical Exams/Immunizations	Covered 100% (deductible/co-pay waived)
Routine Well Visit Exams	Covered 100% (deductible/co-pay waived)
PHYSICIAN SERVICES	IN-NETWORK
Office and Specialty Visits	Covered 80%, AFTER Deductible
DIAGNOSTIC PROCEDURES	IN-NETWORK
Diagnostic X-Ray	Covered 80%, AFTER Deductible
Diagnostic Laboratory <u>using Quest Diagnostic Labs</u>	Covered 100% (deductible/co-pay waived) Note: Quest Diagnostic Labs has facilities across the U.S. Log into your account online at www.Aetna.com to find a Quest location.
Diagnostic Laboratory (other than Quest)	Covered 80%, AFTER Deductible IF done by any other laboratory/physician office.
Diagnostic Complex Imaging (MRI/CT/PET SCAN)	Covered 80%, AFTER Deductible

EMERGENCY MEDICAL CARE	IN-NETWORK
Urgent Care	Covered 100% (deductible/co-pay waived)
Walk-In Clinics	Covered 100% (deductible/co-pay waived)
Emergency Room	Covered 80%, AFTER Deductible
Ambulance	Covered 80%, AFTER Deductible
HOSPITAL CARE (Northwest Texas Hospital - Nwth)	IN-NETWORK
Inpatient Coverage (In Amarillo, the only in network facility is Nwth)	Covered 80%, AFTER Deductible
Inpatient Maternity Coverage (includes delivery and postpartum care)	Covered 80%, AFTER Deductible
Outpatient Hospital or Surgery	Covered 80%, AFTER Deductible
MENTAL HEALTH SERVICES	IN-NETWORK
Inpatient and Outpatient Treatment	Covered 80%, AFTER Deductible
ALCOHOL/DRUG ABUSE SERVICES	IN-NETWORK
Outpatient Treatment	Covered 80%, AFTER Deductible
OTHER SERVICES	IN-NETWORK
Outpatient Short-Term Rehabilitation Includes Speech, Physical, and Occupational Therapy	Covered 80%, AFTER Deductible
Spinal Manipulation Therapy	Covered 80%, AFTER Deductible Limited to 20 visits per calendar year
Durable Medical Equipment	Covered 80%, AFTER deductible
Prosthetics	Covered 80%, AFTER deductible
Hearing Aids	\$2,000 maximum every 3 years, AFTER Deductible

MEDICAL PLAN 2

FEATURES	IN-NETWORK
Deductible (per calendar year)	\$1,500 Individual \$3,000 Family
Out-of-Pocket Limit (per calendar year) Includes deductible, coinsurance, and medical/prescription co-pays	\$5,000 Individual \$10,000 Family
Out-of-Network Coverage	None , except for emergencies
PREVENTIVE CARE	IN-NETWORK
Routine Adult Physical Exams/Immunizations	Covered 100% (deductible/co-pay waived)
Routine Well Visit Exams	Covered 100% (deductible/co-pay waived)
PHYSICIAN SERVICES	IN-NETWORK
Office Visit	\$25 Co-pay
Specialist Visit (includes mental health)	\$50 Co-pay
DIAGNOSTIC PROCEDURES	IN-NETWORK
Diagnostic X-Ray	Covered 80%, AFTER Deductible
Diagnostic Laboratory <u>using Quest Diagnostic Labs</u>	Covered 100%. Note: Quest Diagnostic Labs has facilities across the U.S. Log into your account online at www.Aetna.com to find a Quest location.
Diagnostic Laboratory (other than Quest)	Covered 80%, AFTER Deductible IF done by any other laboratory/physician office.
Diagnostic Complex Imaging (MRI/CT/PET SCAN)	Covered 80%, AFTER Deductible
EMERGENCY MEDICAL CARE	IN-NETWORK
Urgent Care	Covered 100% (deductible/co-pay waived).
Walk-In Clinics	\$25 Co-pay
Emergency Room	Covered 80%, AFTER Deductible
Ambulance	Covered 80%, AFTER Deductible
HOSPITAL CARE (Northwest Texas Hospital - NWTH)	IN-NETWORK
Inpatient Coverage (In Amarillo, the only in network facility is NWTH)	Covered 80%, AFTER Deductible
Inpatient Maternity Coverage (includes delivery and postpartum care)	Covered 80%, AFTER Deductible
Outpatient Hospital or Surgery	Covered 80%, AFTER Deductible
MENTAL HEALTH SERVICES	IN-NETWORK
Inpatient and Outpatient Treatment	Covered 80%, AFTER Deductible

ALCOHOL/DRUG ABUSE SERVICES	IN-NETWORK
Outpatient Treatment	Covered 80%, AFTER Deductible
OTHER SERVICES	IN-NETWORK
Outpatient Short-Term Rehabilitation Includes Speech, Physical, and Occupational Therapy	Covered 80%, AFTER Deductible
Spinal Manipulation Therapy	\$50 Co-Pay (Specialist Office Visit) Limited to 20 visits per calendar year
Durable Medical Equipment	Covered 80%, AFTER deductible
Prosthetics	Covered 80%, AFTER deductible
Hearing Aids	\$2,000 maximum every 3 years, AFTER Deductible

100% Covered Medical Services - Both Medical Plans

Under both medical plans, some medical services are covered at 100%. This allows you and your enrolled family members to have quality care with little or no cost depending on the service(s) provided.

Preventative Care Screenings: If enrolled in a medical plan there are preventative care services for enrollees that are covered at 100%. Contact Aetna customer service for more information on other preventative care services available under the medical plan.

In-Network Urgent Care Clinic Visits: If enrolled in a medical plan, urgent care clinic visits using an in-network facility will be covered at 100% with no cost share to the member.

Teladoc: Teladoc is a telehealth medical service offered to City medical plan members. Members can call Teladoc at 1-855-Teladoc (1-855-835-2362) or access via Smartphone app (search for Teladoc) to request a visit. If you have a Smartphone, we encourage members to download the app and enter your demographic information. This will eliminate the need to register when you need the service. A medical doctor will assess you over the phone or by video conference call. In addition, the provider may also call-in necessary prescriptions at the member's requested pharmacy.

24-Hour Nurse Line: The 24-Hour Nurse Line can provide helpful information and possibly prevent an unneeded trip to the doctor's office. You can call the toll-free number listed in this guide on pg. 2 or go to www.Aetna.com and log into your account.

Quest Diagnostic Labs: Lab work is 100% paid. Log into your account at www.Aetna.com to locate local/nationwide providers. The Amarillo location is at 2207 S. Western Street, Space 50, Amarillo, TX 79109, and phone number is 1-806-358-0880. Hours of operation: M-Th 8am to 5pm (closed for lunch from 12:30 to 1:30pm) and Friday 8am to 2:00pm. To schedule an appointment, you can call 1-888-277-8772 or go online at <https://appointment.questdiagnostics.com>.

Prescription Drug Plan

If you enroll in the medical plan, you will automatically receive prescription drug coverage through **MaxorPlus Pharmacy**. Your prescription drug plan information will be located on the back side of your Aetna medical card. Note, copays do apply towards the out-of-pocket maximum under the medical plan. Using your Smartphone download the MaxorPlus App for quick access to your prescription information.

Category	Retail (30-Day Supply)	Mail Order (90-Day Supply)
Generic Drugs - Walmart/Sam's:	\$10	\$20 (You can get a 90-day supply of your medication at Walmart/Sam's OR through MaxorPlus Mail Order)
Generic Drugs Filled Somewhere Other than Walmart/Sam's:	\$15	\$20 (You can get a 90-day supply of your medication at Walmart/Sam's OR through MaxorPlus Mail Order)
Preferred Brand Drugs:	\$35	\$70
Non-Preferred Brand Drugs:	\$50	\$100
Specialty Drugs (limited to a 30-day supply only):	\$65	Not Available – You may only get a 30-day supply

MaxorPlus Pharmacy offers certain preventive medications to you at no cost (\$0 copay)

Preventive Medications: \$0 copay

- Generic aspirin for cardiovascular & colorectal cancer prevention for patients 50 and older
- Generic aspirin for women at high risk of pre-eclampsia
- Bowel prep generics medications for patients ages 45-75
- Breast cancer prevention generic tamoxifen, raloxifene, or aromatase inhibitors for women who are at increased risk for breast cancer
- Generic, over-the-counter (OTC), and prescription folic acid medications for women up to the age of 55
- Generic fluoride oral supplements up to the age of 6
- Tobacco deterrents annual limit of 2 cycles of treatment (12 weeks/cycle) only on generics and brands with no generics

Contraceptives: \$0 Copay

- Generics & brands with no generics

Statins: \$0 Copay

- Generic lovastatin at \$0 without Prior Authorization for ages 40-75*
- *Prior Authorizations can be requested for other low-to-moderate dose statins*

MaxorPlus Pharmacy offers certain preventive medications to you at no cost (\$0 copay) - Continued

HIV-pre-exposure prophylaxis (PrEP): \$0 Copay

- Truvada for adolescents and adults who are at high risk of HIV acquisition*

**Prior Authorization is required*

Immunizations/Vaccines/Toxoids: \$0 Copay

- Diphtheria Toxoid
- Haemophilus Influenza Type B Vaccine
- Hepatitis A vaccine - min 12 months
- Hepatitis B vaccine
- Human Papillomavirus Vaccine - max 26 years
- Influenza Vaccine - min 6 months
- Measles Vaccine - min 12 months to max 60 years old
- Mumps Vaccine - min 12 months to max 60 years old
- Rubella Vaccine - min 12 months to max 60 years old
- Meningococcal Vaccine
- Pertussis
- Pneumonia Vaccine
- Polio Vaccine - max 18 years
- Rotavirus Vaccine
- Shingles Vaccine - Zostavax (min 60 years old); Shingrix (min 50 years old)
- Tetanus Toxoid
- Varicella Vaccine - min 12 months
- COVID-19
- Respiratory Syncytial Virus (RSV) – up to age 2 and 60 plus
- Combinations of the above

Dental Plans

The Dental Plans will provide you and your family with coverage for typical dental expenses such as cleanings, x-rays, and fillings. The dental plan is provided through **MetLife**. The MetLife Provider Network used is **PDP Plus**.

DENTAL PLAN 1	
<u>Annual Deductible*</u> Individual Family *The deductible applies only when using Out-of-Network providers for Basic/Major Restorative and Children Orthodontia Services	\$50 \$100
<u>Annual Benefit Maximum</u> (Per Member) Applies to preventative, basic and major services.	\$1,000
<u>Preventive Services</u> - Cleanings (3 per year), exams, x-rays	100% (no deductible)
<u>Basic Services</u> – Fillings, extractions	80% (after deductible*)
<u>Major Services</u> – Bridges, dentures	50% (after deductible*)
<u>Orthodontia for Children (up to 19 years of age)</u> Note: Adult orthodontics is not covered by this plan.	\$1,500 per Lifetime (50% of Negotiated Fee)

DENTAL PLAN 2	
<u>Annual Deductible*</u> Individual Family *No deductible applied when using either in- or out-of-network providers.	\$0 \$0
<u>Annual Benefit Maximum</u> (Per Member) Applies to preventative, basic and major services.	\$1,500
<u>Preventive Services</u> – Cleanings (3 allowed each calendar year), exams, x-rays	100%
<u>Basic Services</u> – Fillings, extractions	80%
<u>Major Services</u> – Bridges, dentures	50%
<u>Orthodontia for Children (up to 19 years of age) and Orthodontia for Adults (Employee and Legal Spouse)</u>	\$1,500 per Lifetime (50% of Negotiated Fee)

Dental Information

- You will **not** receive an ID Card. When visiting a dentist, the member will simply provide employee's name and social security number. If you want to print a temporary dental ID card, go to www.metlife.com/benefits and "Register Your Account" for the first-time logging into this site.
- Use of an in-network provider under Dental Plan 1 for Basic, Major or Children Orthodontia will provide savings for certain services under this Plan. Search for participating dentists in MetLife's network – www.metlife.com/dental, click on "Find a Participating Dentist," select "PDP Plus" under your Network, and search by zip code and dentist/practice name is optional or through MetLife App (search "MetLife").
- Orthodontia benefits include traditional ortho braces, Invisalign, clear aligners (through Smile Direct Club). Contact MetLife customer service for more information about this benefit.
- Transition of Care benefits for existing orthodontia for qualifying children and/or adults may be available. Contact MetLife customer service for more information about this benefit.
- Provided above is a summary of your dental benefits, contact MetLife directly if you have additional questions about your dental benefits.

Vision Plan

The Vision Plan is administered by **The Standard Insurance Company through EyeMed**. You will save money by utilizing in-network providers. Under this plan, members must choose either contacts or glasses. A vision card will be mailed to the home address on file with the Benefits Department.

Vision Plan Summary (Plan 1: Balanced Care Vision II Plan H)

	EyeMed Insight Network	Out of Network
Deductibles		
	\$10 Exam	No deductible
	\$25 Eye Glass Lenses	
Annual Eye Exam	Covered in full	Up to \$35
Lenses (per pair)		
Single Vision	Covered in full	Up to \$25
Bifocal	Covered in full	Up to \$40
Trifocal	Covered in full	Up to \$55
Lenticular	20% discount	Not covered
Progressive	See lens options	NA
Contacts		
Fit & Follow Up Exams		
<i>Standard</i>	Standard: Participant cost up to \$40	Not covered
<i>Premium (Allowance)</i>	Premium: 10% off of retail	Not covered
Elective	Up to \$150	Up to \$150
Medically Necessary	Covered in full	Up to \$200
Frame Allowance	\$150	Up to \$75
Frequencies (months)		
Exam/Lens/Frame	12/12/24	12/12/24
	Based on date of service	Based on date of service
Lens Options (Participant Cost)		
	EyeMed Insight Network	Out of Network
Progressive Lenses		
<i>Standard</i>	\$65 + lens deductible	Not covered
<i>Premium</i>		
<i>Tier 1</i>	\$85 + lens deductible	Not covered
<i>Tier 2</i>	\$95 + lens deductible	Not covered
<i>Tier 3</i>	\$110 + lens deductible	Not covered
<i>Tier 4</i>	\$65 plus 80% of charge less \$120 allowance	Not covered
Std. Polycarbonate	\$40	Not covered
Tint (solid and gradient)	\$15	Not covered
Scratch Resistant Coating	\$15	Not covered
Anti-Reflective Coating		
Standard	\$45	Not covered
Premium		
<i>Tier 1</i>	\$57	Not covered
<i>Tier 2</i>	\$68	Not covered
<i>Tier 3</i>	80% of the charge	Not covered
Ultraviolet Coating	\$15	Not covered
Lasik or PRK	Average discount of 15% off retail price or 5% off promotional price at US Laser Network participating providers.	Not covered

Additional Balanced Care Vision II H Features

EyeMed In-Network Discounts	15% discount off the remaining balance in excess of the conventional contact lens allowance. 20% discount off the remaining balance in excess of the frame allowance. 20% discount on items not covered by the plan at network providers, which may not be combined with any other discounts or promotional offers. This discount does not apply to EyeMed Provider's professional services or contact lenses.
EyeMed In-Network Secondary Purchase Plan	Participants receive a 40% discount on a complete pair of glasses once the funded benefit has been exhausted. Participants receive a 15% discount off the retail price on conventional contact lenses once the funded benefit has been exhausted. Discount applies to materials only.
Contact Lens Replacement by Mail Program	After exhausting the contact lens benefit, replacement lenses may be obtained at significant discounts on-line. Visit www.eyemedvisioncare.com for details.

Based on applicable laws, reduced costs may vary by doctor location.

Vision Plan Participant Service

Balanced Care Vision II from The Standard features the money-saving eye care network of EyeMed Vision Care. Customer service is available to plan participants through EyeMed's well-trained and helpful service representatives. Call or go online to locate the nearest EyeMed Access network provider, view plan benefit information and more.

EyeMed Customer Care Center: 1-866.289.0614

- Service Representative Hours: 7 a.m. to 10 p.m. CT Monday through Saturday, 10 a.m. to 7 p.m. CT Sunday
- Interactive Voice Response available 24/7

Locate an EyeMed provider at:

You can search specific zip codes or providers on the EyeMed website under the Insight Network:

<https://eyedoclocator.eyemedvisioncare.com/member/en>

Employees may create a Vision Member Account to access certificates, online ID Cards and EOB's by following these steps:

1. Begin at <https://www.eyemedvisioncare.com/member/public/login.emvc>. The address will direct you to The EyeMed's website.
2. Click on Create an Account. Please enter the primary member's social security number. If you encounter any problems with account setup or for help using online services, please contact our Web Support team at 1-866-939-3633.

Life Insurance

The Standard Insurance Company “The Standard” is the vendor for our life insurance plans. On date of hire or on the status change date from a part-time to full-time position, employees are automatically enrolled in the \$10,000 Employee Basic Life Insurance & Accidental Death & Dismemberment (AD&D) benefit that is paid by the employer. Additional Life Insurance is available for yourself, your legal spouse and/or dependent children (through 25 years of age). These premiums are paid by the employee and deducted from your paycheck on a post-tax basis. Information is provided below regarding the insurance plans available to you.

Type of Coverage	Coverage
<p>Employee</p>	<p><u>Employee Basic & Additional Life Insurance</u></p> <ul style="list-style-type: none"> ○ \$10,000 Basic Life Insurance with AD&D – EMPLOYER PAID ○ Additional Life Insurance with AD&D – EMPLOYEE PAID (POST-TAX) ○ \$10,000 up to \$500,000 (in \$10,000 increments) ○ Additional Employee Life Insurance cannot exceed 8 times your Base Annual Earnings (rounded down to the next \$10,000 of coverage). ○ No Evidence of Insurability (EOI) is required for amounts elected up to \$250,000. If eligible, and electing coverage above \$250,000, you will need to submit EOI online. You will then pay premiums on the \$250,000 beginning with your date of hire or status change date. The Standard will notify both the employee and the Benefits Department of approval or denial of the EOI coverage. If approved, your premiums will increase based on the amount approved. ○ The deadline to submit EOI is 31 calendar days from your date of hire or status change date. ○ Link to EOI website can be accessed through your Smartphone or via your computer (see pg. 2 for link). You will need to provide your date of hire and base annual earnings when completing your EOI. ○ The Standard Insurance Company may request additional medical, testing, bloodwork, etc., during the EOI process. Each EOI is reviewed on an individual basis and the medical underwriters would request additional information if needed. The Standard will pay for additional testing if required. ○ Premiums elected will be based on your age as of January 1st of the current calendar year. ○ Age reductions at age 70 and 75 will reduce the amount of coverage available to you.
<p>Legal Spouse</p>	<p><u>Spouse Additional Life Insurance</u></p> <ul style="list-style-type: none"> ● Additional Life Insurance with AD&D – EMPLOYEE PAID (POST-TAX) <ul style="list-style-type: none"> ○ \$10,000 up to \$50,000 (in \$10,000 increments) ○ No EOI is required for any amounts elected. ○ The coverage amount for your spouse cannot exceed 100% of your combined Basic Life of \$10,000 and Employee Additional Life coverage. For clarification purposes on this requirement, your “total” Employee Basic and Additional Life coverage must be equal to or greater than the Employee’s coverage. ○ Age reductions are based on Spouse’s age and coverage will be reduced to 50% at age 70 and to 25% at age 75.

Dependent Children

Dependent Children Additional Life Insurance

- Additional Life Insurance – **EMPLOYEE PAID (POST-TAX)**
 - \$10,000 policy for each eligible child at a bi-weekly premium of .46 cents.
 - No EOI is required.
 - Dependent children are covered through 25 years of age.

Additional Life Insurance Employee Age Bracket and Employee/Spouse Age Reduction Changes

The Benefits Department will make any changes to your premiums and/or coverage levels at the beginning of each calendar year based on age bracket changes or age reductions at age 70 or 75 from the previous calendar year (January 1 through December 31st). These changes will be reflected on the first paycheck received in January. For example, your age as of January 1st of the current year (which is noted on your enrollment form) is 54 years of age. You turn 55 years of age in the current calendar year which caused you to go to the next age bracket of 55-59 years of age. Your insurance premium will then increase the following year based on your age bracket change. If you or your spouse turns 70 or 75 years of age in the previous calendar year, your coverage level and premiums will change in the following calendar year.

Evidence of Insurability (EOI)

If you are electing greater than \$250,000 (\$260,000 or more) of coverage under the Employee Additional Life Insurance Plan you will need to go online to Standard's website at <https://myeoi.standard.com/646089> and complete the EOI form within 31 calendar days from your eligibility date.

Updating Life Insurance Beneficiaries

You can update your life insurance beneficiaries anytime throughout the year through the online system.

Voluntary Long-Term Disability (LTD)

The Standard Insurance Company "The Standard" is the vendor for the voluntary LTD plan. This is an employee paid post-tax benefit and it offers income replacement if you are continuously disabled for 90 consecutive days or longer.

A summary of this benefit is provided below:

- For qualifying disabilities, you must be continuously disabled for 90 days before you become eligible to receive your monthly benefit.
- If approved, you will receive 60% of your eligible earnings, up to a maximum benefit of \$12,500 per month.
- For a continuous disability, your benefits may last until your Social Security Normal Retirement Age depending on your age at time of disability. If you become disabled before age 62, LTD benefits may continue during disability until age 65 or to the Social Security Normal Retirement Age (SSNRA) or 3 years, 6 months, which is longer. If you become disabled at age 62 or older, the benefit duration is determined by the age when disability begins.
- Your benefits will be reduced if you have deductible income, which is income you receive or are eligible to receive while receiving LTD benefits. Some examples of deductible income include sick or annual leave pay and/or benefits being received under workers' compensation.
- If you enroll in the voluntary long-term disability benefit at time of hire or status change to full-time, your first premium deduction will be reflected on your first paycheck or the paycheck that covers your status change effective date.
- If you feel that you may have a qualifying disability where you will be out more than 90 consecutive calendar days, it is suggested that you begin the disability claim process after 30 days of your disability. The disability claim packet and filing a claim Frequently Asked Questions (FAQs) can be requested by contacting the Benefits Department.
- If you have further questions about this benefit, please contact MetLife's Life Claims customer service number located in the Benefits Contact list within this guide or call the Benefits Department.

Flexible Spending Accounts (FSAs)

ASI Flex is the vendor for Flexible Spending Accounts for Health Care and Dependent Day Care. FSA accounts allow you to set aside money from your paycheck pre-tax to pay for out-of-pocket health care expenses and child day care expenses and, in some cases, elder care expenses. You can enroll in one or both FSA plans. A list of eligible expenses including over-the counter (OTC) and reimbursement of orthodontia benefits can be found on the ASI Flex website.

What is a Health Care Flexible Spending Account (HCFSA)?

Eligible expenses include medical, prescriptions, dental, vision, hearing and over-the-counter health care products for yourself, your qualifying spouse, and children. A Debit Card will be automatically mailed to new enrollees in the HCFSA plan only and can be presented at point of sale in place of submitting a claim.

How much can I contribute to my HCFSA?

The minimum you can contribute is \$100 and maximum is \$3,050.

What is a Dependent Day Care Flexible Spending Account (DCFSA)?

Eligible expenses are those incurred while you and your spouse, if married, work or look for work. This can include daycare, general purpose day camps (overnight camp is not eligible), regular babysitting, before and after school care, nursery or preschool, and pre-kindergarten expenses.

How much can I contribute to my DCFSA?

Your contribution maximum limit is determined by your tax filing status. Married Filing Separately is \$2,500 and Single, Head of Household, or if Married Filing Jointly is \$5,000. The minimum you can contribute is \$100.

Does a DCFSA impact the tax credit on my income tax return?

You cannot claim a tax credit for amounts contributed to your DCFSA. However, you may be able to claim a tax credit for amounts, up to IRS limits, not contributed to your DCFSA.

How do I submit claims and get reimbursed?

- HCFSA – As you incur expenses, you can submit a claim to be reimbursed. FSA monies elected under this Plan are available when you first become eligible for benefits or at the beginning of the calendar year following your Open Enrollment election.
- DCFSA – Your funds are available as you contribute throughout the year via payroll deduct into your account.

Under both FSA Plans there are several easy ways to submit claims. You do not have to choose only one option; you can use multiple options throughout the year:

- **ASIFlex Mobile App** – Download the app and log into your account. Then, just snap a picture of your itemized receipt and submit a claim via the app. You can also access your balance and account statement.
- **ASIFlex Online** – Sign into your online account to submit a claim. Go to www.ASIFlex.com to see your account statement and balance, submit claims, sign up for email, text alerts and direct deposit.
- **Toll-Free Fax or Mail** – Download and complete a claim form. Then, submit it with your itemized receipt. Keep a copy for your records.

Reimbursements will be made to you within three business days following receipt of a complete claim. Log into your ASIFlex account to sign up for direct deposit reimbursement to a bank account of your choice.

There is a grace period allowed under both FSA Plans that provides additional time to incur expenses. You have from January 1st through December 31st each calendar year and an additional grace period through March 15th of the following calendar year to incur expenses (15-1/2 months total). The deadline to submit reimbursements is June 15th of the following calendar year. If you have funds left in your account after March 15th of the following calendar year and no further expenses to submit you will then forfeit these funds into your FSA account(s) per IRS regulations.

Pension Benefits

Texas Municipal Retirement System (TMRS)

TMRS is a retirement pension program for civilians (includes Fire Marshalls) and police officers. Eligible employees will automatically be enrolled in this program on date of hire for new employees or when they meet eligibility requirements for status changes. You contribute 7% of your gross compensation each pay period on a pre-tax basis and your employer will make a 14.9% matching contribution into your TMRS retirement account. When you have 5 years of service credit you are 100% vested. You earn a month of service credit toward retirement each month you make a deposit while employed in an eligible position. As a vested member, if you leave TMRS-covered employment, you may leave your deposits (includes employee/employer matching contributions) with TMRS, and your deposits will continue to earn yearly interest credits until you retire. If you are not vested and leave TMRS-covered employment, you may leave your deposits (includes only employee contributions) with TMRS up to 5 years and your deposits will continue to earn yearly interest credits. Download the TMRS App and register your account for easy access to your personal information.

Service credit with other statewide retirement systems or government entities may also count toward your eligibility for service retirement. With combined service, you may be able to retire earlier. Contact the Benefits Department for more information on Prior Service Credit.

To be eligible to retire and receive a pension annuity you must meet the following eligibility requirements. You must have at least 20 years of service at any age or be at least 60 years of age with 5 years of service or receive approval for disability retirement through TMRS.

You will be mailed a TMRS packet to your home address on file. You will need to set up your account online at www.tmr.com or through the TMRS App and make your beneficiary elections. Any address or name changes will need to be updated through TMRS. After you meet your vesting requirement of 5 years, TMRS will require you to update your beneficiary information.

If you plan on retiring with the City, it is recommended that you schedule an appointment with the Benefits Office within 30 days from your retirement date.

Amarillo Fireman Relief and Retirement Fund (AFRRF)

Under the Texas Local Fire Fighters Retirement Act (TLFFRA), City of Amarillo Firefighters are provided a retirement benefit. As provided under TLFFRA, all firefighters must be less than 36 years of age upon entering service for the City as a firefighter and must become members of the Plan. This Plan provides pension, death, and disability benefits. This Plan covers current and former firefighters, as well as beneficiaries of current and former firefighters. Firefighters will need to refer to the AFRRF for retirement eligibility requirements. Contact the Finance Department at 1-806-378-3040 for any questions about the AFRRF.

Other Retirement Plans

457b Deferred Compensation Plan through Nationwide

This plan provides an additional opportunity for employees to save money for retirement under the Deferred Compensation Plan through Nationwide by contributing pre-and post-tax dollars into a retirement account. You can enroll in this plan anytime throughout the year. Contribution changes will be effective at the beginning of the first available pay period after the contribution change from Nationwide is received by the Benefits Department.

You can increase, decrease, or stop your contributions anytime throughout the year. You can make this contribution change yourself by logging into your Nationwide account online or through the App, or by calling Nationwide customer service or by contacting our Nationwide representative by phone.

There is an Automatic Contribution Feature that allows you to increase your contribution automatically by a percentage of your choice each year. Go to "Manage Account," select "Automatic Contributions Increase," then "Manage Automatic Increase." Then scroll down and provide the necessary information to set up this feature.

The 2024 IRS Limits for the regular 457 is \$23,000. If age 50 or older in 2024, an additional contribution of \$7,500 is allowed for a total annual amount of \$30,500. The minimum contribution you can elect is \$10.00 each paycheck.

Active Employees – Special Catch-Up Option with 457(b) Deferred Compensation Plan

- ✓ You must be enrolled in the 457(b) Deferred Compensation Plan through Nationwide with the City to be eligible to enroll in this benefit.
- ✓ An option is available for employees that have not maxed out their employee contributions up to the maximum IRS limits in the 3 calendar years prior to the year in which Normal Retirement Age occurs. Note: You cannot defer Special Catch-Up amounts in the year in which Normal Retirement Age occurs.
- ✓ Normal Retirement Age for Police Officers is 40 to 70-1/2 years of age and Civilians is 65 to 70-1/2 years of age.
- ✓ If enrolled in the Special Catch-Up Option, you are not allowed during this 3-year period to also contribute in the 50+ Catchup Contribution. After the 3-year Special Catch-Up period ends, the 50+ Catch-Up provision will resume to those eligible.
- ✓ If you are interested in finding out more about this benefit, contact Nationwide customer service at 1-877-677-3678, M-F: 7am to 10pm and Saturday 8am to 5pm CST.

Other Benefits/Information

AFLAC

Employees have the opportunity to enroll in AFLAC's supplemental insurance policies for Short-Term Disability, Cancer, Accident, Hospital and Critical Care. Contact the local AFLAC representative located in the Benefits Contact list anytime throughout the year to enroll in any of these policies. The insurance premiums are 100% paid by the employee post-tax through payroll deduction. Visit aflac.com/myaflac or download the MyAflac mobile app to register and log into your account. Once registered, you can enroll in claims direct deposit and file an AFLAC SmartClaim to get paid quickly and track the status of your claim.

Employee Assistance Program (EAP)

The Deer Oaks Employee Assistance Program (EAP) is a free service provided for you, your dependents, and household members that begins on your first day of employment. This program offers a wide variety of counseling, referral, and consultation services, which are all designed to assist you and your family in resolving work and life issues in order to live happier, healthier, more balanced lives. From stress, addiction and change management, to locating childcare facilities, legal assistance, and financial challenges, their qualified professionals are here to help. These services are completely confidential and can be easily accessed 24/7, offering you around-the-clock assistance for all of life's challenges. Counseling services are available in person, over the phone, or via telehealth where you and anyone living in your household receive up to six free, confidential counseling sessions per issue.

- ✔ **Program Access:** You may access the EAP by calling the toll-free Helpline number, using our iConnectYou App, or instant messaging with a work-life consultant through our online instant messaging system.
- ✔ **Telephonic Assessments & Support:** In-the-moment telephonic support and crisis intervention are available 24/7 along with intake and clinical assessments.
- ✔ **Short-term Counseling:** Counseling sessions with a qualified counselor to assist with issues such as stress, anxiety, grief, marital/family challenges, relationship issues, addiction, etc. Counseling is available via structured telephonic sessions, video, and in-person at local provider offices.
- ✔ **Referrals & Community Resources:** Our team provides referrals to local community resources, member health plans, support groups, legal resources, and child/elder care/daily living resources.
- ✔ **Advantage Legal Assist:** Free 30 minute telephonic or in-person consultation with a plan attorney; 25% discount on hourly attorney fees if representation is required; unlimited online access to a wealth of educational legal resources, links, tools and forms; and interactive online Simple Will preparation.
- ✔ **Advantage Financial Assist:** Unlimited telephonic consultation with an Accredited Financial Counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction, financial planning, and identity theft; supporting educational materials available; unlimited online access to a wealth of educational financial resources, links, tools and forms (i.e. tax guides, financial calculators, etc.).
- ✔ **Alternate Modes of Support:** Your EAP offers support alternatives in addition to traditional short-term counseling including telephonic life coaching, AWARE stress reduction sessions, and virtual group counseling. During your call with one of our counselors, ask if these programs would be right for you.
- ✔ **Work-life Services:** Our work-life consultants are available to assist you with a wide range of daily living resources such as locating pet sitters, event planners, home repair, tutors, travel planning, and moving services. Simply call the Helpline for resource and referral information.
- ✔ **Child & Elder Care Referrals:** Our child and elder care specialists can help you with your search for licensed child and elder care facilities in your area. They will discuss your needs, provide guidance, resources, and qualified referral packets. Searchable databases and other resources are also available on the Deer Oaks member website.
- ✔ **Take the High Road Ride Reimbursement Program:** Deer Oaks reimburses members for their cab, Lyft and Uber fares in the event that they are incapacitated due to impairment by a substance or extreme emotional condition. This service is available once per year per participant, with a maximum reimbursement of \$45.00 (excludes tips).



CONTACT US:

Toll-Free: (888) 993-7650
Website: www.deeroakseap.com
Username/Password: **amarillo**
Email: eap@deeroaks.com

Access your EAP 24/7 by downloading the iConnectYou app that instantly connects you with professionals for instant support and help finding resources for you and your family. To access iConnectYou, download the app from the App Store (iPhone) or Google Play (Android) and register using the iConnectYou Passcode: 131997.

Name, Address and/or Beneficiary Changes

Provided below is the information you will need to change your address, name and/or beneficiaries.

- **Address Change**

- These changes can be updated in Workday either through your computer or on the App. These changes are transferred electronically to the benefit vendors except for employees enrolled in the TMRS retirement plan and AFLAC. See additional information on how to make these changes by benefit plan as shown below.

- **Name Change**

- These changes can be updated in Workday either through your computer or on the App. Documentation for the name change will be required at time of request. **A name change on your dependents can only be performed through your computer, not on the App.** These changes are transferred electronically to the benefit vendors except for employees enrolled in the TMRS or AFRRF retirement plans and AFLAC. See additional information on how to make these changes by benefit plan as shown below.

- **Beneficiary Changes**

- Basic Life Insurance provided by the Employer and Optional Employee Life Insurance – Updated in Workday.
- Nationwide 457 Deferred Compensation
 - Log into your account at www.nrsforu.com.
 - Beneficiary Change – Select “View Account” and Click on Beneficiaries. Click on “Manage Beneficiaries.” Select Primary and Secondary Beneficiaries where they both add up to 100%.
- TMRS Retirement Plan – See information below on how to make a beneficiary change.
- Amarillo Fireman Relief and Retirement Fund (AFRRF) – See information below on how to make a beneficiary change.

- **TMRS – Log into your account at www.tmr.com or call TMRS Customer Service at 1-800-924-8677**

- Address Change – Under Quick Links under Update, Click on “Contact Information” and Select “Edit”.
- Name Change – Under Quick Links under TMRS Forms, Click on “Download Forms”, Click on “Commonly Used TMRS Forms”, Click on “Address or Name Change Form.” Fillable form pops up and fill out required fields. Print out and sign form. Fax or mail form per instructions at the top of the page.
- Beneficiary Change – Under Quick Links under Update, Click on “Beneficiaries”, Click on “Update Retirement Beneficiaries.” Fill out the requested information.

- **Firefighters Only – Amarillo Fireman Relief and Retirement Fund (AFRRF)**

- Name/Beneficiary Changes – Contact the Finance Department M-F, 8am to 5pm by either of the following methods:
 - Phone: 1-806-378-3040.
 - In Person at City Hall, 3rd Floor in Finance Department, Rm. 301.

- **AFLAC**

- If you have an address or name change, contact AFLAC M-F, 8am to 5pm by phone at 1-806-418-8881

Active Employees – Considering Future Retirement

This is a free service provided to employees through Via Benefits that is a resource providing guidance to help assist you in planning and questions you have regarding health insurance during retirement including Medicare. Visit the New Discover VIA Benefits Website at <https://my.viabenefits.com/discover/> or call customer service at 1-855-803-2540, M-F, 7am to 8pm CST.

Future Retiree Benefits

To be eligible to receive these benefits you must be enrolled in the medical and/or dental plan on the day you retire and be 60 years of age or older with at least 10 years of service or received approved disability retirement approval through TMRS or AFRRF, or 20 years of service at any age.

Pre-65 Retiree Medical/Dental

You must be enrolled in the medical and/or dental plan at the time of retirement to be eligible for this benefit. Only dependents (legal spouse and eligible children) enrolled in these plan(s) prior to retirement are eligible to enroll in the pre-65 medical/dental plan. If an employee retires and elects the pre-65 medical/dental plan there will be no lapse in coverage moving from the active to the pre-65 medical/dental plans. When either the retiree and/or spouse turns 65 and children are covered under the pre-65 plans, the children will automatically be dropped from coverage at the end of the month the retiree or spouse turns 65 or when the child turns 26 years of age (whichever comes first).

Health Reimbursement Account (HRA) Sick Leave Benefit

At time of retirement, Civilian, Police Officers, and 8-hour Firefighters will be allowed to convert any available sick leave, above 90 days of sick leave (720 hours) paid at retirement into a Health Reimbursement Account (HRA). Each 30 hours of accrued sick leave above 90 days will be converted to the equivalent of one month of retiree only medical coverage at the current rate for Medical Plan 1. The resulting dollar value will be deposited into the retiree's HRA. 12-hour Firefighters who retire will be allowed to convert any available sick leave, above the 90 days (1080 hours) paid at retirement into a Health Reimbursement Account. Each 42 hours of accrued sick leave above 90 days will be converted to the equivalent of one month of retiree only medical coverage at the current rate for Medical Plan 1. The resulting dollar value will be deposited into the retiree's HRA.

Retiree Life Insurance

Employees are eligible to elect a \$5,000 or \$10,000 Retiree Life Insurance policy on themselves. A Retiree Spouse Life Insurance policy is available in the amount of \$5,000 if the Retiree \$10,000 policy is elected. Retirees can select either of these Retiree Life Insurance policies and still convert their current life insurance policies.

Post-65 Retiree Benefits

Retirees and their legal spouse must be enrolled in the medical plan at time of retirement to be eligible for the post-65 Health Reimbursement Account (HRA) benefit offered by VIA Benefits through Towers Watson. The retiree and/or spouse will be transitioned to this service when they reach the age of 65 and are Medicare eligible. Enrollment in Medicare using VIA Benefits at time of eligibility allows the retiree and/or spouse up to \$1800 each year into an HRA. The HRA allows you to pay for Medicare supplemental insurance premiums and other healthcare eligible expenses.

Sick Leave Rollover

Employees that are within 3 years of retirement eligibility and have a required amount of accrued sick leave at time of request may be eligible for the 457 Deferred Compensation rollover option. Civilian employees are eligible for this benefit only if they were hired prior to October 1, 2007. Firefighters and Police Officers are eligible regardless of their hire date. All employees, except for 12-hour firefighters, must have at least 816 hours accrued sick leave hours at time of request. Twelve-hour firefighters must have 1224 hours. Non-firefighter employees that will be 57 years of age and are within 3 years of retirement eligibility must have 576 hours accrued sick leave hours at time of request.

Key information about this program is provided below:

- ✓ Employees must have a 457 Deferred Compensation Account open at the time of their request.
- ✓ Employees must sign up each year if they want to participate in the program once their 3-year period begins.
- ✓ Employees are only eligible to participate in this 3-year program one time during their employment with the City of Amarillo.
- ✓ Employees are only eligible for this benefit for a 3-year period that starts with the first year of the election. If the rollover is elected the 1st year and the employee chooses not to participate the following year (2nd year), they are eligible to participate in the 3rd year. All other employees, except for firefighters, can rollover 240 hours at their base hourly rate each year during their continuous 3-year period into their City of Amarillo's Deferred Compensation Account. 12-hour firefighters can rollover 360 hours each year.
- ✓ A firefighters rollover amount will be determined based on their current shift worked at time of rollover (i.e., 8 hr. or 12 hr. firefighter).
- ✓ Required sick leave hours must be met in the 1st year you are participating and twelve (12) days of sick leave must remain in your sick leave account after the rollover.
- ✓ Elections are irrevocable once elected and cannot later be used as compensable sick time.
- ✓ Participation cannot occur during the year you plan to retire with the City.
- ✓ The Benefits Department will send out communication to eligible employees each year.

Health Coverage Notices

This brochure contains several legal notices that are required to be distributed to participants in group health plans sponsored by the City of Amarillo.

The notices included in this brochure are:

- **HIPPA Notice of Privacy Practices** explains how the group health plans protect your personal medical information.
- **Medicare Part D Creditable Coverage Notice** provides information about how your current prescription drug coverage under the health care plans is affected—and your options for coverage—when you become eligible for Medicare.
- **General Notice of COBRA Continuation Coverage Rights** explains when you and your family may be able to temporarily continue coverage under the health plans if coverage would otherwise end for you.
- **Health Insurance Marketplace Coverage Options and Your Health Coverage** describes the Health Insurance Marketplace, eligibility and tax credit information.
- **Newborns' Act Disclosure** that describes federal laws that govern benefits for hospital stays for mothers following the birth of child.
- **Women's Health and Cancer Rights Act** that summarizes the benefits available under your medical plan if you have had or are going to have a mastectomy.
- **Notice of Special Enrollment Rights** that explains when you can enroll in the plan due to special circumstances.
- **Children's Health Insurance Program (CHIP)** provides health coverage to eligible children, through both Medicaid and separate CHIP programs.

HIPPA Notice of Privacy Practices

This Notice Describes How Medical Information About You May Be Used And Disclosed And How You Can Get Access To This Information.

Our Company's Pledge to You

This notice is intended to inform you of the privacy practices followed by the *City of Amarillo* (the Plan) and the Plan's legal obligations regarding your protected health information under the Health Insurance Portability and Accountability Act of 1996 (HIPAA). The notice also explains the privacy rights you and your family members have as participants of the Plan. It is effective on **January 1, 2024**.

The Plan often needs access to your protected health information in order to provide payment for health services and perform plan administrative functions. We want to assure the participants covered under the Plan that we comply with federal privacy laws and respect your right to privacy. **The City** requires all members of our workforce and third parties that are provided access to protected health information to comply with the privacy practices outlined below.

Protected Health Information

Your protected health information is protected by the HIPAA Privacy Rule. Generally, protected health information is information that identifies an individual created or received by a health care provider, health plan or an employer on behalf of a group health plan that relates to physical or mental health conditions, provision of health care, or payment for health care, whether past, present or future.

How We May Use Your Protected Health Information

Under the HIPAA Privacy Rule, we may use or disclose your protected health information for certain purposes without your permission. This section describes the ways we can use and disclose your protected health information.

Payment. We use or disclose your protected health information without your written authorization in order to determine eligibility for benefits, seek reimbursement from a third party, or coordinate benefits with another health plan under which you are covered. For example, a health care provider that provided treatment to you will provide us with your health information. We use that information in order to determine whether those services are eligible for payment under our group health plan.

Health Care Operations. We use and disclose your protected health information in order to perform plan administration functions such as quality assurance activities, resolution of internal grievances, and evaluating plan performance. For example, we review claims experience in order to understand participant utilization and to make plan design changes that are intended to control health care costs.

However, we are prohibited from using or disclosing protected health information that is genetic information for our underwriting purposes.

Treatment. Although the law allows use and disclosure of your protected health information for purposes of treatment, as a health plan we generally do not need to disclose your information for treatment purposes. Your physician or health care provider is required to provide you with an explanation of how they use and share your health information for purposes of treatment, payment, and health care operations.

As permitted or required by law. We may also use or disclose your protected health information without your written authorization for other reasons as *permitted* by law. We are *permitted* by law to share information, subject to certain requirements, in order to communicate information on health-related benefits or services that may be of interest to you, respond to a court order, or provide information to further public health activities (e.g., preventing the spread of disease) without your written authorization. We are also permitted to share protected health information during a corporate restructuring such as a merger, sale, or acquisition. We will also disclose health information about you when *required* by law, for example, in order to prevent serious harm to you or others.

Pursuant to your Authorization. When required by law, we will ask for your written authorization before using or disclosing your protected health information. Uses and disclosures not described in this notice will only be made with your written authorization. Subject to some limited exceptions, your written authorization is required for the sale of protected health information and for the use or disclosure of protected health information for marketing purposes. If you choose to sign an authorization to disclose information, you can later revoke that authorization to prevent any future uses or disclosures.

To Business Associates. We may enter into contracts with entities known as Business Associates that provide services to or perform functions on behalf of the Plan. We may disclose protected health information to Business Associates once they have agreed in writing to safeguard the protected health information. For example, we may disclose your protected health information to a Business Associate to administer claims. Business Associates are also required by law to protect protected health information.

To the Plan Sponsor. We may disclose protected health information to certain employees of *the City* for the purpose of administering the Plan. These employees will use or disclose the protected health information only as necessary to perform plan administration functions or as otherwise required by HIPAA, unless you have authorized additional disclosures. Your protected health information cannot be used for employment purposes without your specific authorization.

Your Rights

Right to Inspect and Copy. In most cases, you have the right to inspect and copy the protected health information we maintain about you. If you request copies, we will charge you a reasonable fee to cover the costs of copying, mailing, or other expenses associated with your request. Your request to inspect or review your health information must be submitted in writing to the person listed below. In some circumstances, we may deny your request to inspect and copy your health information. To the extent your information is held in an electronic health record, you may be able to receive the information in an electronic format.

Right to Amend. If you believe that information within your records is incorrect or if important information is missing, you have the right to request that we correct the existing information or add the missing information. Your request to amend your health information must be submitted in writing to the person listed below. In some circumstances, we may deny your request to amend your health information. If we deny your request, you may file a statement of disagreement with us for inclusion in any future disclosures of the disputed information.

Right to an Accounting of Disclosures. You have the right to receive an accounting of certain disclosures of your protected health information. The accounting will not include disclosures that were made (1) for purposes of treatment, payment or health care operations; (2) to you; (3) pursuant to your authorization; (4) to your friends or family in your presence or because of an emergency; (5) for national security purposes; or (6) incidental to otherwise permissible disclosures.

Your request to for an accounting must be submitted in writing to the person listed below. You may request an accounting of disclosures made within the last six years. You may request one accounting free of charge within a 12-month period.

Right to Request Restrictions. You have the right to request that we not use or disclose information for treatment, payment, or other administrative purposes except when specifically authorized by you, when required by law, or in emergency circumstances. You also have the right to request that we limit the protected health information that we disclose to someone involved in your care or the payment for your care, such as a family member or friend. Your request for restrictions must be submitted in writing to the person listed below. We will consider your request, but in most cases are not legally obligated to agree to those restrictions.

Right to Request Confidential Communications. You have the right to receive confidential communications containing your health information. Your request for restrictions must be submitted in writing to the person listed below. We are required to accommodate reasonable requests. For example, you may ask that we contact you at your place of employment or send communications regarding treatment to an alternate address.

Right to be Notified of a Breach. You have the right to be notified in the event that we (or one of our Business Associates) discover a breach of your unsecured protected health information. Notice of any such breach will be made in accordance with federal requirements.

Right to Receive a Paper Copy of this Notice. If you have agreed to accept this notice electronically, you also have a right to obtain a paper copy of this notice from us upon request. To obtain a paper copy of this notice, please contact the person listed below.

Our Legal Responsibilities

We are required by law to maintain the privacy of your protected health information, provide you with this notice about our legal duties and privacy practices with respect to protected health information and notify affected individuals following a breach of unsecured protected health information.

We may change our policies at any time and reserve the right to make the change effective for all protective health information that we maintain. In the event that we make a significant change in our policies, we will provide you with a revised copy of this notice. You can also request a copy of our notice at any time. For more information about our privacy practices, contact the person listed below.

If you have any questions or complaints, please contact:

Name of Entity/Sender: City of Amarillo

Contact/Office: Benefits Department

Address: P.O. Box 1971, Amarillo, Texas 79105-1971

Phone Number: 1-806-378-4235

Complaints

If you are concerned that we have violated your privacy rights, or you disagree with a decision we made about access to your records, you may contact the person listed above. You also may send a written complaint to the U.S. Department of Health and Human Services — Office of Civil Rights. The person listed above can provide you with the appropriate address upon request or you may visit www.hhs.gov/ocr for further information. You will not be penalized or retaliated against for filing a complaint with the Office of Civil Rights or with us.

Medicare Part D Creditable Coverage Notice

Important Notice from the City of Amarillo About Your Prescription Drug Coverage and Medicare

Please read this notice carefully and keep it where you can find it. This notice has information about your current prescription drug coverage with the City of Amarillo (the "Plan Sponsor") and about your options under Medicare's prescription drug coverage. This information can help you decide whether you want to join a Medicare drug plan. If you are considering joining, you should compare your current coverage, including which drugs are covered at what cost, with the coverage and costs of the plans offering Medicare prescription drug coverage in your area. Information about where you can get help to make decisions about your prescription drug coverage is at the end of this notice.

There are two important things you need to know about your current coverage and Medicare's prescription drug coverage:

1. Medicare prescription drug coverage became available in 2006 to everyone with Medicare. You can get this coverage if you join a Medicare Prescription Drug Plan or join a Medicare Advantage Plan (like an HMO or PPO) that offers prescription drug coverage. All Medicare drug plans provide at least a standard level of coverage set by Medicare. Some plans may also offer more coverage for a higher monthly premium.
2. The City of Amarillo has determined that the prescription drug coverage offered by the City of Amarillo Group Health Plan is, on average for all plan participants, expected to pay out as much as standard Medicare prescription drug coverage pays and is therefore considered Creditable Coverage. Because your existing coverage is Creditable Coverage, you can keep this coverage and not pay a higher premium (a penalty) if you later decide to join a Medicare drug plan.

When Can You Join A Medicare Drug Plan?

You can join a Medicare drug plan when you first become eligible for Medicare and each year from October 15th to December 7th.

However, if you lose your current creditable prescription drug coverage, through no fault of your own, you will also be eligible for a two (2) month Special Enrollment Period (SEP) to join a Medicare drug plan.

What Happens To Your Current Coverage If You Decide to Join A Medicare Drug Plan?

If you decide to join a Medicare drug plan, your current City of Amarillo coverage will be affected. If you do decide to join a Medicare drug plan and drop your current City of Amarillo coverage, be aware that you and your dependents will not be able to get this coverage back.

When Will You Pay A Higher Premium (Penalty) To Join A Medicare Drug Plan?

You should also know that if you drop or lose your current coverage with the City and don't join a Medicare drug plan within 63 continuous days after your current coverage ends, you may pay a higher premium (a penalty) to join a Medicare drug plan later.

If you go 63 continuous days or longer without creditable prescription drug coverage, your monthly premium may go up by at least 1% of the Medicare base beneficiary premium per month for every month that you did not have that coverage. For example, if you go nineteen months without creditable coverage, your premium may consistently be at least 19% higher than the Medicare base beneficiary premium. You may have to pay this higher premium (a penalty) as long as you have Medicare prescription drug coverage. In addition, you may have to wait until the following October to join.

For More Information About This Notice Or Your Current Prescription Drug Coverage...

Contact the person listed on the following page for further information. **NOTE:** You'll get this notice each year. You will also get it before the next period you can join a Medicare drug plan, and if this coverage through the City of Amarillo changes. You also may request a copy of this notice at any time.

For More Information About Your Options Under Medicare Prescription Drug Coverage...

More detailed information about Medicare plans that offer prescription drug coverage is in the "Medicare & You" handbook. You'll get a copy of the handbook in the mail every year from Medicare. You may also be contacted directly by Medicare drug plans.

For more information about Medicare prescription drug coverage:

- Visit www.medicare.gov.
- Call your State Health Insurance Assistance Program (see the inside back cover of your copy of the "Medicare & You" handbook for their telephone number) for personalized help.
- Call 1-800-MEDICARE (1-800-633-4227). TTY users should call 1-877-486-2048.

If you have limited income and resources, extra help paying for Medicare prescription drug coverage is available. For information about this extra help, visit Social Security on the web at www.socialsecurity.gov, or call them at 1-800-772-1213 (TTY 1-800-325-0778).

Name of Entity/Sender: City of Amarillo
Contact/Office: Benefits Department
Address: P.O. Box 1971, Amarillo, Texas 79105-1971
Phone Number: 1-806-378-4235

Updated: April 1, 2011

Remember: Keep this Creditable Coverage notice. If you decide to join one of the Medicare drug plans, you may be required to provide a copy of this notice when you join to show whether or not you have maintained creditable coverage and, therefore, whether or not you are required to pay a higher premium (a penalty).

General Notice of COBRA Continuation Coverage Rights

Continuation Coverage Rights under COBRA

Introduction

You're getting this notice because you recently gained coverage under a group health plan (City of Amarillo). This notice has important information about your right to COBRA continuation coverage, which is a temporary extension of coverage under the Plan. **This notice explains COBRA continuation coverage, when it may become available to you and your family, and what you need to do to protect your right to get it.** When you become eligible for COBRA, you may also become eligible for other coverage options that may cost less than COBRA continuation coverage.

The right to COBRA continuation coverage was created by a federal law, the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA). COBRA continuation coverage can become available to you and other members of your family when group health coverage would otherwise end. For more information about your rights and obligations under the Plan and under federal law, you should review the Plan's Summary Plan Description or contact the Plan Administrator.

You may have other options available to you when you lose group health coverage. For example, you may be eligible to buy an individual plan through the Health Insurance Marketplace. By enrolling in coverage through the Marketplace, you may qualify for lower costs on your monthly premiums and lower out-of-pocket costs. Additionally, you may qualify for a 30-day special enrollment period for another group health plan for which you are eligible (such as a spouse's plan), even if that plan generally doesn't accept late enrollees.

What is COBRA Continuation Coverage?

COBRA continuation coverage is a continuation of Plan coverage when it would otherwise end because of a life event. This is also called a "qualifying event." Specific qualifying events are listed later in this notice. After a qualifying event, COBRA continuation coverage must be offered to each person who is a "qualified beneficiary." You, your spouse, and your dependent children could become qualified beneficiaries if coverage under the Plan is lost because of the qualifying event. Under the Plan, qualified beneficiaries who elect COBRA continuation coverage must pay for COBRA continuation coverage.

If you're an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your hours of employment are reduced; or
- Your employment ends for any reason other than your gross misconduct.

If you're the spouse of an employee, you'll become a qualified beneficiary if you lose your coverage under the Plan because of the following qualifying events:

- Your spouse dies;
- Your spouse's hours of employment are reduced;
- Your spouse's employment ends for any reason other than his or her gross misconduct;
- Your spouse becomes entitled to Medicare benefits (under Part A, Part B, or both); or
- You become divorced or legally separated from your spouse.

If you're dependent children will become qualified beneficiaries if they lose coverage under the Plan because of the following qualifying events:

- The parent-employee dies;
- The parent-employee's hours of employment are reduced;
- The parent-employee's employment ends for any reason other than his or her gross misconduct;
- The parent-employee becomes entitled to Medicare benefits (Part A, Part B, or both);
- The parents become divorced or legally separated; or
- The child stops being eligible for coverage under the Plan as a "dependent child."

Sometimes, filing a proceeding in bankruptcy under Title 11 of the United States Code can be a qualifying event. If a proceeding in bankruptcy is filed with respect to the City of Amarillo, and that bankruptcy results in the loss of coverage of any retired employee covered under the Plan, the retired employee will become a qualified beneficiary. The retired employee's spouse, surviving spouse, and dependent children will also become qualified beneficiaries if bankruptcy results in the loss of their coverage under the Plan.

When is COBRA Continuation Coverage Available?

The Plan will offer COBRA continuation coverage to qualified beneficiaries only after the Plan Administrator has been notified that a qualifying event has occurred. The employer must notify the Plan Administrator of the following qualifying events:

- The end of employment or reduction of hours of employment;
- Death of the employee;
- Commencement of a proceeding in bankruptcy with respect to the employer; or
- The employee's becoming entitled to Medicare benefits (under Part A, Part B, or both).

For all other qualifying events (divorce or legal separation of the employee and spouse or a dependent child's losing eligibility for coverage as a dependent child), you must notify the Plan Administrator at 806-378-4235 within 60 days after the qualifying event occurs. You must provide this notice to the Benefits Department with required documentation.

How is COBRA Continuation Coverage Provided?

Once the Plan Administrator receives notice that a qualifying event has occurred, COBRA continuation coverage will be offered to each of the qualified beneficiaries. Each qualified beneficiary will have an independent right to elect COBRA continuation coverage. Covered employees may elect COBRA continuation coverage on behalf of their spouses, and parents may elect COBRA continuation coverage on behalf of their children.

COBRA continuation coverage is a temporary continuation of coverage that generally lasts for 18 months due to employment termination or reduction of hours of work. Certain qualifying events, or a second qualifying event during the initial period of coverage, may permit a beneficiary to receive a maximum of 36 months of coverage.

There are also ways in which this 18-month period of COBRA continuation coverage can be extended:

Disability Extension of 18-Month Period of Continuation Coverage

If you or anyone in your family covered under the Plan is determined by Social Security to be disabled and you notify the Plan Administrator in a timely fashion, you and your entire family may be entitled to get up to an additional 11 months of COBRA continuation coverage, for a maximum of 29 months. The disability would have to have started at some time before the 60th day of COBRA continuation coverage and must last at least until the end of the 18-month period of COBRA continuation coverage.

Second Qualifying Event Extension of 18-Month Period of Continuation Coverage

If your family experiences another qualifying event during the 18 months of COBRA continuation coverage, the spouse and dependent children in your family can get up to 18 additional months of COBRA continuation coverage, for a maximum of 36 months, if the Plan is properly notified about the second qualifying event. This extension may be available to the spouse and any dependent children getting COBRA continuation coverage if the employee or former employee dies; becomes entitled to Medicare benefits (under Part A, Part B, or both); gets divorced or legally separated; or if the dependent child stops being eligible under the Plan as a dependent child. This extension is only available if the second qualifying event would have caused the spouse or dependent child to lose coverage under the Plan had the first qualifying event not occurred.

Are There Other Coverage Options Besides COBRA Continuation Coverage?

Yes. Instead of enrolling in COBRA continuation coverage, there may be other coverage options for you and your family through the Health Insurance Marketplace, Medicaid, or other group health plan coverage options (such as a spouse's plan) through what is called a "special enrollment period." Some of these options may cost less than COBRA continuation coverage. You can learn more about many of these options at www.healthcare.gov.

Can I enroll in Medicare instead of COBRA continuation coverage after my group health plan coverage ends?

In general, if you don't enroll in Medicare Part A or B when you are first eligible because you are still employed, after the Medicare initial enrollment period, you have an 8-month special enrollment period¹ to sign up for Medicare Part A or B, beginning on the earlier of

- The month after your employment ends; or
- The month after group health plan coverage based on current employment ends.

If you don't enroll in Medicare and elect COBRA continuation coverage instead, you may have to pay a Part B late enrollment penalty and you may have a gap in coverage if you decide you want Part B later. If you elect COBRA continuation coverage and later enroll in Medicare Part A or B before the COBRA continuation coverage ends, the Plan may terminate your continuation coverage. However, if Medicare Part A or B is effective on or before the date of the COBRA election, COBRA coverage may not be discontinued on account of Medicare entitlement, even if you enroll in the other part of Medicare after the date of the election of COBRA coverage.

If you are enrolled in both COBRA continuation coverage and Medicare, Medicare will generally pay first (primary payer) and COBRA continuation coverage will pay second. Certain plans may pay as if secondary to Medicare, even if you are not enrolled in Medicare.

If You Have Questions

Questions concerning your Plan or your COBRA continuation coverage rights should be addressed to the contact or contacts identified below. For more information about your rights under the Employee Retirement Income Security Act (ERISA), including COBRA, the Patient Protection and Affordable Care Act, and other laws affecting group health plans, contact the nearest Regional or District Office of the U.S. Department of Labor's Employee Benefits Security Administration (EBSA) in your area or visit www.dol.gov/ebsa. (Addresses and phone numbers of Regional and District EBSA Offices are available through EBSA's website.) For more information about the Marketplace, visit www.healthcare.gov.

Keep Your Plan Informed of Address Changes

To protect your family's rights, let the Plan Administrator know about any changes in the addresses of family members. You should also keep a copy, for your records, of any notices you send to the Plan Administrator.

Plan Contact Information: If you have any questions about COBRA continuation coverage, call the City of Amarillo Benefits Department at 1-806-378-4235.

Health Insurance Marketplace Coverage Options and Your Health Coverage

PART A: General Information

When key parts of the health care law took effect in 2014, there is another way to buy health insurance: the Health Insurance Marketplace. To assist you as you evaluate options for you and your family, this notice provides some basic information about the Marketplace and employment-based health coverage offered by your employer.

What is the Health Insurance Marketplace?

The Marketplace is designed to help you find health insurance that meets your needs and fits your budget. The Marketplace offers "one-stop shopping" to find and compare private health insurance options. You may also be eligible for a tax credit that lowers your monthly premium right away. Typically, you can enroll in a Marketplace health plan during the Marketplace's annual Open Enrollment period with coverage starting the 1st of January of the following calendar year or if you experience a qualifying life event.

Can I Save Money on my Health Insurance Premiums in the Marketplace?

You may qualify to save money and lower your monthly premium, but only if your employer does not offer coverage, or offers coverage that doesn't meet certain standards. The savings on your premium that you're eligible for depends on your household income.

Does Employer Health Coverage Affect Eligibility for Premium Savings through the Marketplace?

Yes, if you have an offer of health coverage from your employer that meets certain standards, you will not be eligible for a tax credit through the Marketplace and may wish to enroll in your employer's health plan. However, you may be eligible for a tax credit that lowers your monthly premium or a reduction in certain cost-sharing if your employer does not offer coverage to you at all or does not offer coverage that meets certain standards. If the cost of a plan from your employer that would cover you (and not any other members of your family) is more than 9.5% of your household income for the year, or if the coverage your employer provides does not meet the "minimum value" standard set by the Affordable Care Act, you may be eligible for a tax credit.

Note: If you purchase a health plan through the Marketplace instead of accepting health coverage offered by your employer, then you may lose the employer contribution (if any) to the employer-offered coverage. Also, this employer contribution -as well as your employee contribution to employer-offered coverage- is often excluded from income for Federal and State income tax purposes. Your payments for coverage through the Marketplace are made on an after-tax basis.¹

How Can I Get More Information?

For more information about your coverage offered by your employer, please check your Summary Plan Description or contact the City of Amarillo Benefits Department at 601 S. Buchanan Street, Amarillo, TX 79105-1971 or by phone 1-806-378-9379.

The Marketplace can help you evaluate your coverage options, including your eligibility for coverage through the Marketplace and its cost. Please visit HealthCare.gov for more information, including an online application for health insurance coverage and contact information for a Health Insurance Marketplace in your area.

¹An employer-sponsored health plan meets the "minimum value standard" if the plan's share of the total allowed benefit costs covered by the plan is no less than 60 percent of such costs.

PART B: Information About Health Coverage Offered by Your Employer

This section contains information about any health coverage offered by your employer. If you decide to complete an application for coverage in the Marketplace, you will be asked to provide this information. This information is numbered to correspond to the Marketplace application.

3. Employer Name City of Amarillo	4. Employer Identification Number (EIN) 75-6000444
5. Employer Address, 7. City, 8. State, 9. Zip Code 601 S. Buchanan Street, Amarillo, TX 79105-1971	6. Employer Phone Number (806) 378-4235
10. Who can we contact about employee health care coverage at this job? Benefits Department	
11. Phone Number (if different from above) Same	12. email address Benefits@amarillo.gov

Here is some basic information about health coverage offered by this employer:

- As your employer, we offer a health plan to:
 - All employees. Eligible employees are:
 - Some employees. Eligible employees are:
- With respect to dependents:
 - We do offer coverage.
- If checked, this coverage meets the minimum value standard, and the cost of this coverage to you is intended to be affordable, based on employee wages.

Even if your employer intends your coverage to be affordable, you may still be eligible for a premium discount through the Marketplace. The Marketplace will use your household income, along with other factors, to determine whether you may be eligible for a premium discount. If, for example, your wages vary from week to week (perhaps you are an hourly employee or you work on a commission basis), if you are newly employed mid-year, or if you have other income losses, you may still qualify for a premium discount.

OMB Control Number 1210-0149 (expires 11/30/2023)

Other Notices

Newborns' Act Disclosure

Group health plans and health insurance issuers generally may not, under Federal law, restrict benefits for any hospital length of stay in connection with childbirth for the mother or newborn child to less than 48 hours following a vaginal delivery, or less than 96 hours following a cesarean section. However, Federal Law generally does not prohibit the mother's or newborn's attending provider, after consulting with the mother, from discharging the mother or her newborn earlier than 48 hours (or 96 hours as applicable). In any case, plans and issuers may not, under Federal law, require that a provider obtain authorization from the plan or the insurance issuer for prescribing a length of stay not in excess of 48 hours (or 96 hours).

Women's Health and Cancer Rights Act (WHCRA)

Do you know that your plan, as required by the Women's Health and Cancer Right Act of 1998, provides benefits for mastectomy-related services, including all stages of reconstruction and surgery to achieve symmetry between the breasts, prostheses and treatment for complications resulting from a mastectomy, including lymphedema? Call your Plan Administrator at (806) 378-4235 for more information.

Notice of Special Enrollment Rights

If you are declining enrollment for yourself or your dependents (including your spouse) because of other health insurance or group health plan coverage, you may be able to enroll yourself and your dependents in this plan if you or your dependents lose eligibility for that other coverage (or if the employer stops contributing toward your or your dependents' other coverage). However, you must request enrollment within **31 calendar days** after your dependent's other coverage ends (or after the employer stops contributing toward the other coverage).

In addition, if you have a new dependent as a result of marriage, birth, adoption, or placement for adoption, you may be able to enroll yourself and your dependents. However, you must request enrollment no later than 31 calendar days after the marriage, birth, adoption, or placement for adoption.

Effective April 1, 2009, if either of the following two events occur, you will have **60 days after the date of the event** to request enrollment in your employer's plan:

- Your dependents lose Medicaid or CHIP coverage because they are no longer eligible.
- Your dependents become eligible for a state's premium assistance program.

To take advantage of special enrollment rights, you must experience a qualifying event and provide the City of Amarillo's Benefits Department with timely notice of the event and your enrollment request.

To request special enrollment or obtain more information, contact the Benefits Department at 1-806-378-4235.

CHIP NOTICE

Premium Assistance Under Medicaid and the Children's Health Insurance Program (CHIP)

If you or your children are eligible for Medicaid or CHIP and you're eligible for health coverage from your employer, your state may have a premium assistance program that can help pay for coverage, using funds from their Medicaid or CHIP programs. If you or your children aren't eligible for Medicaid or CHIP, you won't be eligible for these premium assistance programs but you may be able to buy individual insurance coverage through the Health Insurance Marketplace. For more information, visit www.healthcare.gov.

If you or your dependents are already enrolled in Medicaid or CHIP and you live in a State listed below, contact your State Medicaid or CHIP office to find out if premium assistance is available.

If you or your dependents are NOT currently enrolled in Medicaid or CHIP, and you think you or any of your dependents might be eligible for either of these programs, contact your State Medicaid or CHIP office or dial **1-877-KIDS NOW** or www.insurekidsnow.gov to find out how to apply. If you qualify, ask your state if it has a program that might help you pay the premiums for an employer-sponsored plan.

If you or your dependents are eligible for premium assistance under Medicaid or CHIP, as well as eligible under your employer plan, your employer must allow you to enroll in your employer plan if you aren't already enrolled. This is called a "special enrollment" opportunity, and **you must request coverage within 60 days of being determined eligible for premium assistance**. If you have questions about enrolling in your employer plan, contact the Department of Labor at www.askebsa.dol.gov or call 1-866-444-EBSA (3272).

If you live in one of the following states, you may be eligible for assistance paying your employer health plan premiums. The following list of states is current as of October 15, 2021. Contact your State for more information on eligibility –

<p>ALABAMA – Medicaid</p> <p>Website: http://myalhipp.com/ Phone: 1-855-692-5447</p>	<p>ALASKA – Medicaid</p> <p>The AK Health Insurance Premium Payment Program Website: http://mvakhipp.com/ Phone: 1-866-251-4861 Email: CustomerService@MyAKHIPP.com Medicaid Eligibility: https://health.alaska.gov/dpa/Pages/default.aspx</p>
<p>ARKANSAS – Medicaid</p> <p>Website: http://myarhipp.com/ Phone: 1-855-MyARHIPP (855-692-7447)</p>	<p>CALIFORNIA – Medicaid</p> <p>Health Insurance Premium Payment (HIPP) Program Website: http://dhcs.ca.gov/hipp Phone: 916-445-8322 Fax: 916-440-5676 Email: hipp@dhcs.ca.gov</p>
<p>COLORADO – Health First Colorado (Colorado's Medicaid Program) & Child Health Plan Plus (CHP+)</p> <p>Health First Colorado Website: https://www.healthfirstcolorado.com/ Health First Colorado Member Contact Center: 1-800-221-3943/State Relay 711 CHP+: https://hcpf.colorado.gov/child-health-plan-plus CHP+ Customer Service: 1-800-359-1991/State Relay 711 Health Insurance Buy-In Program (HIBI): https://www.mycohibi.com/ HIBI Customer Service: 1-855-692-6442</p>	<p>FLORIDA – Medicaid</p> <p>Website: https://www.flmedicaidprecovery.com/flmedicaidprecovery.com/hipp/index.html Phone: 1-877-357-3268</p>

<p align="center">GEORGIA – Medicaid</p> <p>GA HIPP Website: https://medicaid.georgia.gov/health-insurance-premium-payment-program-hipp Phone: 678-564-1162, Press 1 GA CHIPRA Website: https://medicaid.georgia.gov/programs/third-party-liability/childrens-health-insurance-program-reauthorization-act-2009-chipra Phone: 678-564-1162, Press 2</p>	<p align="center">INDIANA – Medicaid</p> <p>Healthy Indiana Plan for low-income adults 19-64 Website: http://www.in.gov/fssa/hip/ Phone: 1-877-438-4479 All other Medicaid Website: https://www.in.gov/medicaid/ Phone: 1-800-457-4584</p>
<p align="center">IOWA – Medicaid and CHIP (Hawki)</p> <p>Medicaid Website: https://dhs.iowa.gov/ime/members Medicaid Phone: 1-800-338-8366 Hawki Website: http://dhs.iowa.gov/Hawki Hawki Phone: 1-800-257-8563 HIPP Website: https://dhs.iowa.gov/ime/members/medicaid-a-to-z/hipp HIPP Phone: 1-888-346-9562</p>	<p align="center">KANSAS – Medicaid</p> <p>Website: https://www.kancare.ks.gov/ Phone: 1-800-792-4884 HIPP Phone: 1-800-967-4660</p>
<p align="center">KENTUCKY – Medicaid</p> <p>Kentucky Integrated Health Insurance Premium Payment Program (KI-HIPP) Website: https://chfs.ky.gov/agencies/dms/member/Pages/kihipp.aspx Phone: 1-855-459-6328 Email: KIHIPP.PROGRAM@ky.gov KCHIP Website: https://kidshealth.ky.gov/Pages/index.aspx Phone: 1-877-524-4718 Kentucky Medicaid Website: https://chfs.ky.gov/agencies/dms</p>	<p align="center">LOUISIANA – Medicaid</p> <p>Website: www.medicaid.la.gov or www.ldh.la.gov/lahipp Phone: 1-888-342-6207 (Medicaid hotline) or 1-855-618-5488 (LaHIPP)</p>
<p align="center">MAINE – Medicaid</p> <p>Enrollment Website: https://www.mymaineconnection.gov/benefits/s/?language=en_US Phone: 1-800-442-6003 TTY: Maine relay 711 Private Health Insurance Premium Webpage: https://www.maine.gov/dhhs/ofi/applications-forms Phone: 1-800-977-6740 TTY: Maine relay 711</p>	<p align="center">MASSACHUSETTS – Medicaid and CHIP</p> <p>Website: https://www.mass.gov/masshealth/pa Phone: 1-800-862-4840 TTY: 711 Email: masspremassistance@accenture.com</p>
<p align="center">MINNESOTA – Medicaid</p> <p>Website: https://mn.gov/dhs/people-we-serve/children-and-families/health-care/health-care-programs/programs-and-services/other-insurance.jsp Phone: 1-800-657-3739</p>	<p align="center">MISSOURI – Medicaid</p> <p>Website: http://www.dss.mo.gov/mhd/participants/pages/hipp.htm Phone: 573-751-2005</p>

<p align="center">MONTANA – Medicaid</p> <p>Website: http://dphhs.mt.gov/MontanaHealthcarePrograms/HIPP Phone: 1-800-694-3084 Email: HSHIPPProgram@mt.gov</p>	<p align="center">NEBRASKA – Medicaid</p> <p>Website: http://www.ACCESSNebraska.ne.gov Phone: 1-855-632-7633 Lincoln: 402-473-7000 Omaha: 402-595-1178</p>
<p align="center">NEVADA – Medicaid</p> <p>Medicaid Website: http://dhcfp.nv.gov Medicaid Phone: 1-800-992-0900</p>	<p align="center">NEW HAMPSHIRE – Medicaid</p> <p>Website: https://www.dhhs.nh.gov/programs-services/medicaid/health-insurance-premium-program Phone: 603-271-5218 Toll free number for the HIPP program: 1-800-852-3345, ext. 5218</p>
<p align="center">NEW JERSEY – Medicaid and CHIP</p> <p>Medicaid Website: http://www.state.nj.us/humanservices/dmahs/clients/medicaid/ Medicaid Phone: 609-631-2392 CHIP Website: http://www.njfamilycare.org/index.html CHIP Phone: 1-800-701-0710</p>	<p align="center">NEW YORK – Medicaid</p> <p>Website: https://www.health.ny.gov/health_care/medicaid/ Phone: 1-800-541-2831</p>
<p align="center">NORTH CAROLINA – Medicaid</p> <p>Website: https://medicaid.ncdhhs.gov/ Phone: 919-855-4100</p>	<p align="center">NORTH DAKOTA – Medicaid</p> <p>Website: https://www.hhs.nd.gov/healthcare Phone: 1-844-854-4825</p>
<p align="center">OKLAHOMA – Medicaid and CHIP</p> <p>Website: http://www.insureoklahoma.org Phone: 1-888-365-3742</p>	<p align="center">OREGON – Medicaid</p> <p>Website: http://healthcare.oregon.gov/Pages/index.aspx Phone: 1-800-699-9075</p>
<p align="center">PENNSYLVANIA – Medicaid and CHIP</p> <p>Website: https://www.dhs.pa.gov/Services/Assistance/Pages/HIPP-Program.aspx Phone: 1-800-692-7462 CHIP Website: Children's Health Insurance Program (CHIP) (pa.gov) CHIP Phone: 1-800-986-KIDS (5437)</p>	<p align="center">RHODE ISLAND – Medicaid and CHIP</p> <p>Website: http://www.eohhs.ri.gov/ Phone: 1-855-697-4347, or 401-462-0311 (Direct RItE Share Line)</p>
<p align="center">SOUTH CAROLINA – Medicaid</p> <p>Website: https://www.scdhhs.gov Phone: 1-888-549-0820</p>	<p align="center">SOUTH DAKOTA - Medicaid</p> <p>Website: http://dss.sd.gov Phone: 1-888-828-0059</p>
<p align="center">TEXAS – Medicaid</p> <p>Website: Health Insurance Premium Payment (HIPP) Program Texas Health and Human Services Phone: 1-800-440-0493</p>	<p align="center">UTAH – Medicaid and CHIP</p> <p>Medicaid Website: https://medicaid.utah.gov/ CHIP Website: http://health.utah.gov/chip Phone: 1-877-543-7669</p>

<p align="center">VERMONT– Medicaid</p> <p>Website: Health Insurance Premium Payment (HIPP) Program Department of Vermont Health Access Phone: 1-800-250-8427</p>	<p align="center">VIRGINIA – Medicaid and CHIP</p> <p>Website: https://coverva.dmas.virginia.gov/learn/premium-assistance/famis-select https://coverva.dmas.virginia.gov/learn/premium-assistance/health-insurance-premium-payment-hipp-programs Medicaid/CHIP Phone: 1-800-432-5924</p>
<p align="center">WASHINGTON – Medicaid</p> <p>Website: https://www.hca.wa.gov/ Phone: 1-800-562-3022</p>	<p align="center">WEST VIRGINIA – Medicaid and CHIP</p> <p>Website: https://dhhr.wv.gov/bms/ http://mywvhpp.com/ Medicaid Phone: 304-558-1700 CHIP Toll-free phone: 1-855-MyWVHIPP (1-855-699-8447)</p>
<p align="center">WISCONSIN – Medicaid and CHIP</p> <p>Website: https://www.dhs.wisconsin.gov/badgercareplus/p-10095.htm Phone: 1-800-362-3002</p>	<p align="center">WYOMING – Medicaid</p> <p>Website: https://health.wyo.gov/healthcarefin/medicaid/programs-and-eligibility/ Phone: 1-800-251-1269</p>

To see if any other states have added a premium assistance program since July 31, 2023, or for more information on special enrollment rights, contact either:

**U.S. Department of Labor
Employee Benefits Security Administration**
www.dol.gov/agencies/ebsa
1-866-444-EBSA (3272)

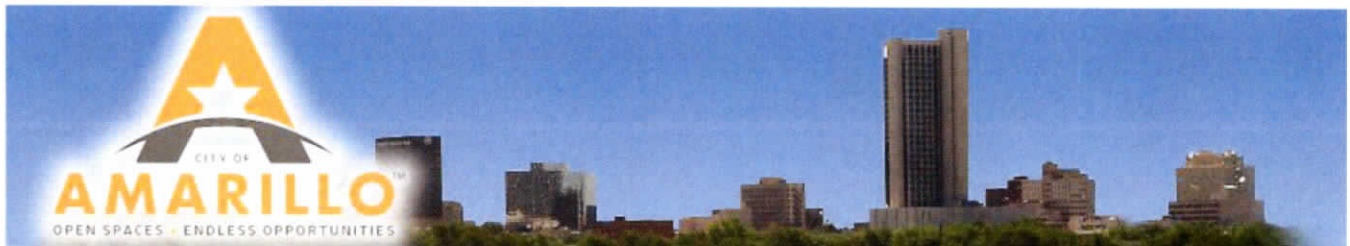
**U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services**
www.cms.hhs.gov
1-877-267-2323, Menu Option 4, Ext. 61565

Paperwork Reduction Act Statement

According to the Paperwork Reduction Act of 1995 (Pub. L. 104-13) (PRA), no persons are required to respond to a collection of information unless such collection displays a valid Office of Management and Budget (OMB) control number. The Department notes that a Federal agency cannot conduct or sponsor a collection of information unless it is approved by OMB under the PRA, and displays a currently valid OMB control number, and the public is not required to respond to a collection of information unless it displays a currently valid OMB control number. See 44 U.S.C. 3507. Also, notwithstanding any other provisions of law, no person shall be subject to penalty for failing to comply with a collection of information if the collection of information does not display a currently valid OMB control number. See 44 U.S.C. 3512.

The public reporting burden for this collection of information is estimated to average approximately seven minutes per respondent. Interested parties are encouraged to send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, Employee Benefits Security Administration, Office of Policy and Research, Attention: PRA Clearance Officer, 200 Constitution Avenue, N.W., Room N-5718, Washington, DC 20210 or email ebsa.opr@dol.gov and reference the OMB Control Number 1210-0137.

OMB Control Number 1210-0137 (expires 1/31/2026)



Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, February 2, 2024 12:02 PM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: RE: 2024 Benefits Guide

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Thank you, Stephanie!

Happy Friday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Friday, February 2, 2024 9:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: FW: 2024 Benefits Guide

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good morning Edward,

Please use this benefits guide – it's the latest and greatest.

Sincerely,

Stephanie Coggins
City Secretary

City of Amarillo
(806) 378-3014

From: Ester, Brandon <Brandon.Ester@amarillo.gov>
Sent: Friday, February 2, 2024 9:24 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: 2024 Benefits Guide

Good morning,

Mitch wanted me to send you the final 2024 Benefits guide to make sure that you received the latest version. Please let me know if you need anything else.

Thank you,

Brandon Ester
Assistant Director of HR
City of Amarillo
Phone 806-378-6224
Email Brandon.Ester@amarillo.gov



<http://careers.amarillo.gov>

Disclaimer

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorized to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, February 1, 2024 4:36 PM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Thank you, Stephanie!

Thank you, Stephanie!

We appreciate your diligence and have plenty to move this project forward.

Happy Thursday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



Baker Tilly US, LLP, trading as Baker Tilly, is a member of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities.

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, February 1, 2024 2:48 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Here is almost everything – I owe you #5, but I didn't want to delay getting the bulk of this back to you.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, January 31, 2024 9:55 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

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Good morning, Stephanie!

My colleague Karen Edwards will also manage this project and will ensure that I stay on target once we get started. Looking forward to working with you both.

Happy Wednesday!

Edward

Edward G Williams
Director



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2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Monday, January 29, 2024 3:16 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Thank you for the agreement. I will work with appropriate departments to obtain the requested information and will plan to have it back to you this week, likely within 1-2 days for most of it.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

1. Organizational charts (titles only).
2. Current FY City of Amarillo budget.
3. # of City Employees FTEs? Part Time?
4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.

17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

Please upload the pictures securely by clicking the below link. Make sure to enter City of Amarillo "Company":

<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971

Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

ATTENTION ELECTED OFFICIALS: A "Reply to All" of this email could lead to violations of the Texas Open Meetings Act. Please reply only to the sender.

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This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast.

Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, February 7, 2024 10:21 AM
To: Williams, Edward
Subject: RE: Baker Tilly E-bill Invoice# BT2674357 Amarillo, TX

Thank you!

Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Tuesday, February 6, 2024 4:33 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>; Savage, Donna <Donna.Savage@amarillo.gov>; Thompson, Carrie <Carrie.Thompson@bakertilly.com>
Subject: RE: Baker Tilly E-bill Invoice# BT2674357 Amarillo, TX

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Happy Tuesday, Stephanie!

We will update the billing address as you requested and will send all future invoices to citysecretary@amarillo.gov. Attached please find our 2024 W-9. Let us know if you need anything else.

Best wishes,

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, February 6, 2024 4:01 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>

Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>; Savage, Donna <Donna.Savage@amarillo.gov>
Subject: RE: Baker Tilly E-bill Invoice# BT2674357 Amarillo, TX

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Good Afternoon Edward,

Can you please help me get our billing email address updated to:citysecretary@amarillo.gov?

Also, we will need a W-9 form in order to set you up as a vendor. I've attached one to this email. Can you or someone from your team please complete it and return it to me (CC Donna Savage) who will help process everything for payment.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

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This email has been scanned for viruses and malware, and may have been automatically archived by Mimecast.

Coggins, Stephanie

From: Edwards, Karen <Karen.Edwards@bakertilly.com>
Sent: Wednesday, February 7, 2024 2:34 PM
To: Coggins, Stephanie
Subject: RE: Signed Letter of Agreement - City of Amarillo

You don't often get email from karen.edwards@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Hi Stephanie,

I am not seeing where the images and logo(s) were uploaded on our end. Will you please upload them again and let me know once that is complete?

Here is the link: <https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Karen Edwards, SHRM-CP
Senior Recruitment Analyst



Baker Tilly US, LLP
T: +1 (813) 915-5616
8626 North Himes Avenue, Tampa, FL 33614
karen.edwards@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, February 1, 2024 3:48 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Sincerely,

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City of Amarillo
(806) 378-3014

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Sent: Wednesday, January 31, 2024 9:55 AM
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Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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My colleague Karen Edwards will also manage this project and will ensure that I stay on target once we get started. Looking forward to working with you both.

Happy Wednesday!

Edward

Edward G Williams
Director



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edward.williams@bakertilly.com | bakertilly.com



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To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Hi Edward,

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Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo

(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

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2. Current FY City of Amarillo budget.
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4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.
17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

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<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



Baker Tilly US, LLP, trading as Baker Tilly, is a member of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities.

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Signed Letter of Agreement - City of Amarillo

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Here is the letter of agreement you sent signed on our end. Please have it executed on your side and return a final copy for my records.

Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

Stephanie Coggins
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence. (Helen Keller)

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Coggins, Stephanie

From: Edwards, Karen <Karen.Edwards@bakertilly.com>
Sent: Wednesday, February 7, 2024 3:37 PM
To: Coggins, Stephanie
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Karen Edwards, SHRM-CP
Senior Recruitment Analyst



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T: +1 (813) 915-5616
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karen.edwards@bakertilly.com | bakertilly.com



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Hi Karen,

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File Request from Michelle Lopez at Baker Tilly

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 IMG_6943.JPG	Uploaded	30.11 MB
 IMG_3940.JPG	Uploaded	6.37 MB
 IMG_3595.JPG	Uploaded	9.27 MB
 IMG_9345.JPG	Uploaded	3.62 MB
 _MG_5295.jpg	Uploaded	2.63 MB
 AS117290.jpg	Uploaded	2.58 MB
 IMG_9847.jpg	Uploaded	980.09 KB
 IMG_0786.jpg	Uploaded	1.84 MB
 IMG_0208.jpg	Uploaded	3.41 MB
 IMG_0799.jpg	Uploaded	2.08 MB
 IMG_0802.jpeg	Uploaded	1.92 MB
 IMG_2491.jpeg	Uploaded	2.71 MB

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City Secretary
City of Amarillo
(806) 378-3014

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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, February 1, 2024 3:48 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Here is almost everything – I owe you #5, but I didn't want to delay getting the bulk of this back to you.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, January 31, 2024 9:55 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Good morning, Stephanie!

My colleague Karen Edwards will also manage this project and will ensure that I stay on target once we get started. Looking forward to working with you both.

Happy Wednesday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
2500 Dallas Parkway, Suite 300, Plano, TX 75093, USA
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Monday, January 29, 2024 3:16 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Hi Edward,

Thank you for the agreement. I will work with appropriate departments to obtain the requested information and will plan to have it back to you this week, likely within 1-2 days for most of it.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

Attached please find a copy of our fully executed city manager search agreement. Additionally, below you will find a list of items we customarily request from clients to support our marketing, advertising, and outreach for a search. We fully recognize that you may not have some of the information we are requesting, so please share what you've got, and we will go from there.

You are welcome to send us a link to the information or as attachments (Word or pdf).

1. Organizational charts (titles only).
2. Current FY City of Amarillo budget.
3. # of City Employees FTEs? Part Time?

4. # of City of Amarillo employees represented by unions, if applicable
5. City credit rating.
6. Official City population?
7. City Manager job description.
8. # of FTE's reporting to the City Manager.
9. City Manager's FY2024 budget?
10. City Manager salary range and anticipated base salary.
11. Current and prior city manager employment agreement?
12. City Manager Benefits.
13. Will the City reimburse candidates for expenses related to in-person interviews?
14. Will the City of Amarillo reimburse the finalist selected for relocation expenses, if applicable?
15. Other Personnel policies affecting recruitment (pre-employment matters, residency requirement, vehicle allowance, phone allowance, or similar)
16. High resolution logo(s). (min 1MB). PNG images with a transparent background preferred.
17. 15-20 images (standalone) high resolution(1MB) color photos (JPEG or PNG) that represent the population, the primary activities of the City, and surrounding area. If possible, include images of the landscape, landmarks, recreation events and economic activities.

Please upload the pictures securely by clicking the below link. Make sure to enter City of Amarillo "Company":
<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, January 25, 2024 11:38 AM

To: Williams, Edward <Edward.Williams@bakertilly.com>

Subject: Signed Letter of Agreement - City of Amarillo

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Hi Edward,

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Also, please let me know how I can assist you as we begin this process. I'm happy to visit via email or jump on a Zoom to discuss what you may need of me in connecting with Council during this process. Please note my cell phone number is below – you are welcome to utilize that number for calls or texts if needed.

Thank you,

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1
7

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Coggins, Stephanie

From: Edwards, Karen <Karen.Edwards@bakertilly.com>
Sent: Wednesday, February 7, 2024 3:40 PM
To: Coggins, Stephanie
Subject: FW: Signed Letter of Agreement - City of Amarillo

You don't often get email from karen.edwards@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Hi Stephanie, I am seeing the images now. Thanks for your help getting these re-uploaded!

Karen Edwards, SHRM-CP
Senior Recruitment Analyst



Baker Tilly US, LLP
T: +1 (813) 915-5616
8626 North Himes Avenue, Tampa, FL 33614
karen.edwards@bakertilly.com | bakertilly.com



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From: Edwards, Karen
Sent: Wednesday, February 7, 2024 4:37 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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City Secretary
City of Amarillo
(806) 378-3014

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Sent: Friday, January 26, 2024 10:30 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Signed Letter of Agreement - City of Amarillo

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<https://bakertilly.sharefile.com/r-r9220b853a64f4ce19fd4ecb0813b82f7>

Edward

Edward G Williams, Ph.D.
Director



Baker Tilly US, LLP
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P O Box 1971
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stephanie.coggins@amarillo.gov
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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, February 21, 2024 8:31 AM
To: Coggins, Stephanie
Cc: Edwards, Karen
Subject: RE: City Manager Recruitment Update
Attachments: Amarillo City Manager Brochure - Draft v1.pdf

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.
Good morning, Stephanie!

I pray all is well with you and yours. Attached is the brochure for your city manager recruitment. Please let me know if you have any suggested edits or concerns. Our goal is to launch the recruitment within the next few days.

Happy Wednesday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, February 20, 2024 3:38 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: City Manager Recruitment Update

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Hi Edward,

I've been out of the office and am catching up on emails. In reviewing the brochure, there is some information that is incorrect or inconsistent with our Charter/policies, and some grammatical revisions to consider. I'd like to send this to

three members of our leadership team (HR, Office of Engagement & Innovation, and Finance) to review their respective parts and provide back confirmation on the information to ensure everything is correct. When would you need these red-lined revisions returned by?

For awareness, I am BCC'ing Council on this email so that we don't cause a possible walking quorum.

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, February 16, 2024 5:17 PM
To: Stanley, Cole <Cole.Stanley@amarillo.gov>; Craft, Josh <Josh.Craft@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Scherlen, Tom <Tom.Scherlen@amarillo.gov>; Simpson, Les <Les.Simpson@amarillo.gov>
Cc: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>; Edwards, Karen <Karen.Edwards@bakertilly.com>
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Mayor Stanley,
Councilmember Craft,
Councilmember Tipps,
Councilmember Scherlen,
Councilmember Simpson,

Dear Mayor and Councilmembers,

This email, and any attachments, may constitute a public record of the City of Amarillo, and may be subject to public disclosure under the Texas Public Information Act.

**Please do not "reply all" to this e-mail as doing so could lead to violations of the Texas Open Meetings Act.
Please reply only to the sender.**

Thank you for your contribution to the attached draft narrative. Please review and let me know if you have any suggested changes, edits, or revisions. The objective is to secure your input to finalize the recruitment brochure and related marketing, recruiting and outreach materials then launch the search as outlined in the attached timeline.

Please let me know if you have any questions or concerns.

Best wishes,

Edward

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Director



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CITY MANAGER

AMARILLO, TEXAS

Application Review Begins: April 15, 2024



PUBLIC SECTOR EXECUTIVE RECRUITMENT

ABOUT THE CITY

Amarillo (est. pop. 200,393), the 14th most populous city in the Lone Star State, is a vibrant city nestled in the heart of the Texas Panhandle. Steeped in history and charm, Amarillo's U.S. Route 66–Sixth Street Historic District boasts a blend of art deco and Spanish Revival architecture, creating a captivating backdrop for dining and antique shopping. For those captivated by the equestrian spirit, the American Quarter Horse Hall of Fame & Museum stands as a testament to the celebrated horse breed.

Serving as a gateway to the expansive Palo Duro Canyon State Park, where trails wind through stunning landscapes, Amarillo is a haven for nature enthusiasts. The iconic Cadillac Ranch, an installation of graffiti-adorned cars partially submerged in a vast field, adds a touch of whimsy to the city's landscape. The city boasts a thriving arts scene, anchored by esteemed professional organizations such as the renowned Amarillo Symphony, the graceful performances of the Lone Star Ballet, and the captivating productions of the Amarillo Opera.

Dubbed "The Yellow Rose of Texas," the city embodies resilience and vitality. Its diverse economy encompasses industries ranging from ranching and farming to education, banking, oil, and gas, as well as medical and tourism to aerospace manufacturing, earning it the title of "Rotor City, USA" with its V-22 Osprey assembly plant. Additionally, Pantex, the nation's sole nuclear weapons assembly and disassembly facility, stands as a cornerstone of employment and innovation.

Education in Amarillo is characterized by a steadfast commitment to excellence and innovation. With a diverse range of public, private, and charter schools, as well as esteemed institutions of higher learning, including Amarillo College and West Texas A&M University, the city provides a comprehensive educational system catering to the needs of students at every level. Whether pursuing traditional academics or specialized fields of study, students in Amarillo are nurtured in an environment that fosters intellectual curiosity, critical thinking, and lifelong learning.

Amarillo's rich tapestry of history, culture, and industry makes it a community brimming with allure and promise.



GOVERNMENT

The City of Amarillo, Texas, operates under a council-manager form of government. This system promotes professional management of the organization and provides a clear separation of legislative and executive functions. Citizens elect a mayor and 4 councilmembers during the Amarillo General Elections in May of each odd-numbered year. The Mayor and Councilmembers are the legislative body responsible for enacting ordinances and resolutions, adopting the City's fiscal year budget, establishing goals, priorities, vision, and the overall direction for the city, representing the interests of the community and hiring a city manager. The city manager, as the chief administrative officer, executes that vision, goals, and priorities established by the city council through the management of city operations and resources. Amarillo's government prioritizes transparency, community engagement, and strategic planning to address the diverse needs and interests of its residents while promoting growth and prosperity in the city.

The City of Amarillo has an AAA rating on its General Obligation bonds, an AA+ rating on its Water and Sewer revenue bonds and Drainage revenue bonds, and an A+ on its Hotel Occupancy Tax bonds, all of which are issued from Standard and Poor's. For Fiscal Year 2023-2024, the City Council approved a \$531.0 million budget that includes \$336.4 million for operation and maintenance functions, \$135.5 million for Capital Improvements, and \$59.2 million for required debt service payments, to sustain a workforce comprising 2,326 Full Time Equivalent positions and 355 Part-Time positions.

[Click here to view the City of Amarillo's organizational chart.](#)

[Click here for more details about the City of Amarillo.](#)



GUIDING PRINCIPALS

- *Create a variety of walkable destinations throughout the city while ensuring convenient local and cross-town connectivity for cars, bikes, and transit.*
- *Provide a range of housing opportunities with nearby employment and services to support all income levels and age groups.*
- *Celebrate cultural and historic assets along key corridors and in specific neighborhoods and districts.*
- *Encourage a diversity of low- to medium-scale places throughout the city.*
- *Increase overall quality of life for all residents by promoting safe, clean, and protected neighborhoods with well-maintained parks, goods, and services nearby.*
- *Prioritize reinvestment in existing infrastructure, neighborhoods, districts, and recreational amenities.*

THE CITY MANAGER

The City Manager directs and coordinates the administration of city government in accordance with policies established and approved by the Mayor and City Council by performing duties personally and through department directors. With a \$2,157,651 (FY2023-24) budget and the support of 6-8 direct reports, the city manager:

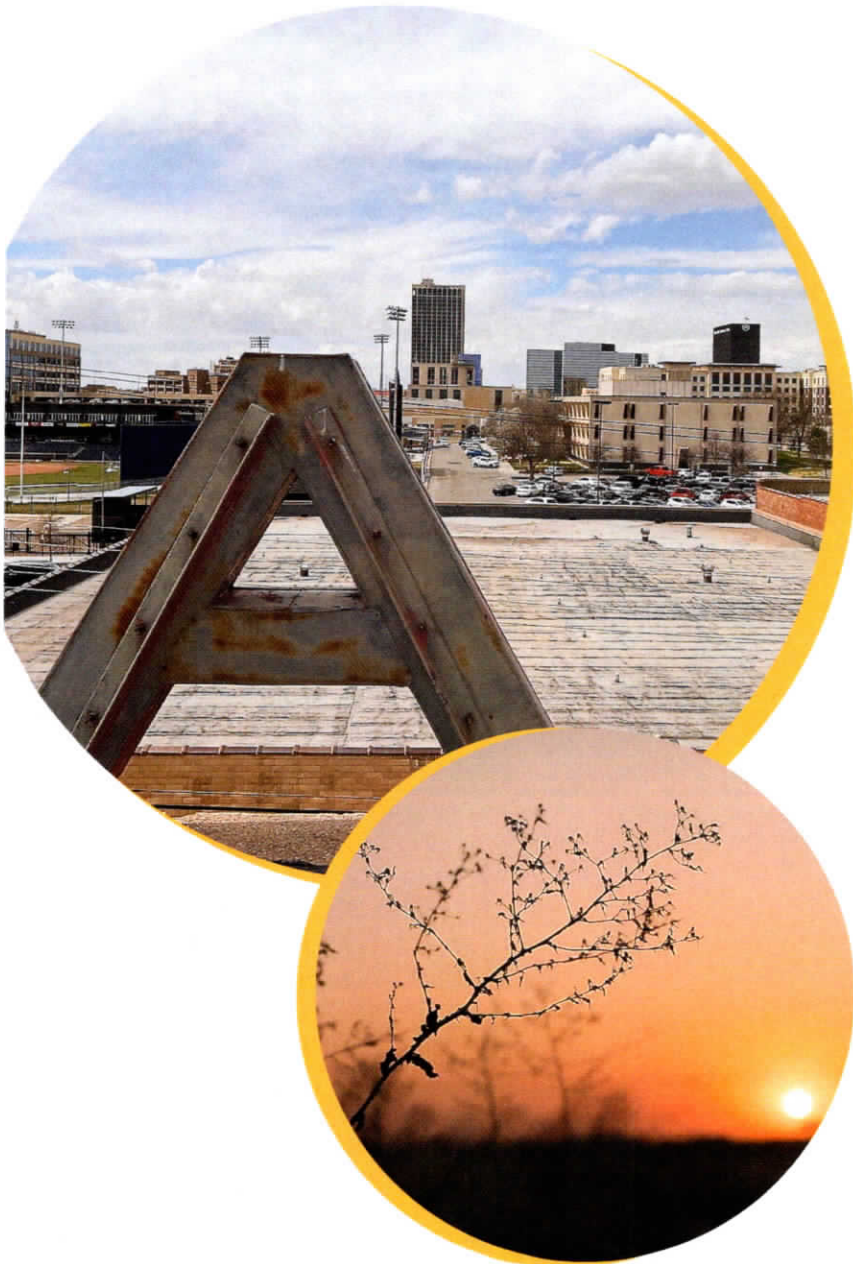
- Appoints department directors and staff according to state laws or local ordinances; oversees divisions handling tax collection, law enforcement, public health, public works, and procurement. Additionally, the city manager prepares and submits annual budgets for approval, plans for future development, and recommends zoning regulations for residential and commercial properties.
- Performs supervisory duties in line with City Charter, policies, and laws, including hiring, performance management, and conflict resolution. Additionally, adept at synthesizing complex information, researching data, and designing workflows.
- Identifies and resolves problems efficiently, develops alternative solutions, collaborates effectively in group problem-solving, manages customer situations adeptly, solicits feedback, meets commitments, focuses on conflict resolution, maintains confidentiality, listens actively, controls emotions, remains open to innovative ideas.
- Effectively communicates verbally and in writing, adapting style as needed, actively listens, participates in meetings, and presents persuasively. Balances team and individual duties, welcomes feedback, fosters morale, and supports group goals. Demonstrates passion, inspires trust, and mobilizes others toward the vision. Develops and communicates implementation plans, builds commitment, monitors progress, and evaluates outcomes.



OPPORTUNITIES FOR THE NEW CITY MANAGER

The new city manager will have an opportunity to lead of Texas's most dynamic cities and make a lasting impact on a vibrant community. As such the city manager will lead...

- **Strategic Planning:** Lead the development of a comprehensive strategic plan that outlines the City's mission, vision, values, goals, and objectives for the future, while engaging with the City Council, internal and external stakeholders to identify key priorities and strategies for achieving them.



- **Collaboration with Elected Officials:** Develop, maintain, and continuously seek improve a strong relationship with the City Council and other elected officials and develops policies, programs or initiatives that reflect the vision, needs and values of the community.
- **High Performing Team:** Build a high performing team, frame, and champion the organization's culture, while inspiring and empowering employees at all levels within the organization to serve with excellence, dedication, innovation, and integrity.
- **Transparent and Accountable Governance:** Maintain transparency and accountability in City operations by providing regular updates to the City Council and community, while adhering to ethical standards and best practices.
- **Team Building and Development:** Establish an employee development, and forward-looking workforce development plan that supports the City Councils vision of professional development, recruitment, promotion, and retention of city staff by building a culture of excellence and innovation, while fostering a collaborative workforce where all employees feel empowered, engaged, and willing to contribute their ideas and expertise.
- **Infrastructure and Economic Development:** Collaborate with the City Council to identify, prioritize, implement, and report on infrastructure projects and economic development initiatives that promote growth and enhance the quality of life for residents.
- **Budget Management:** Proactively prepares, and manages the City's annual budget process, while ensuring the effective and efficient allocation of resources to meet the needs of the community. Explore opportunities for cost-saving measures and revenue generation and presents a budget that not only adheres to sound financial practices but also effectively translates the Council's vision into concrete action, driving the city towards a prosperous and fulfilling future.

DESIRED CAPABILITIES

The Amarillo City Council desires to engage an accomplished municipal management professional who is a strategic leader, effective manager and outstanding communicator who will collaborate with the City Council and a team of resolute public service professionals, to manage the operations of the City effectively, efficiently, and responsively as the city manager. This individual will offer exceptional customer service and public service focus, admirable people skills, and a profound understanding of high performing teams, and organizations. This servant-leader is also a skilled manager, an astute leader who can solve complex problems or challenges and is a collaborative change agent. The Council expects the city manager to bring passion for service delivery excellence, a focused, and visible "Can-do" attitude and a commitment to the traditions, values, and vision of the community.

The new city manager will present a verifiable record of accomplishments in service, effectiveness, efficiencies, and people development. This individual is also a resilient, self-aware professional who welcomes and values divergent perspectives and continuously models and fosters a work culture that engages and encourages people to do and be their best. Equally as important, the new city manager has unquestionable integrity, honesty, and a reputation as a collaborator.

This proficient manager is a servant leader has highly competent and comfortable managing modern and complex principles and best practices of public administration that includes current social, political, and economic trends and operating problems of a municipal government. Furthermore, the next city manager should have strengths in finance and budget, have strengths to allocate resources in a cost-effective manner, and gain cooperation in a team setting through discussion and persuasion.

The City Council expects for the new city manager to respect the community and organizational traditions, be committed to, and enjoy being a part of and collaborating with an engaged community and demonstrate a commitment to leading the organization forward in a positive direction. The city manager should also be willing and able to identify and respond to public and City Council issues and concerns, maintain effective working relationships with the City Council, government officials, public agencies, and the public to evaluate and continuously improve city operations and procedures.



COMPENSATION AND BENEFITS

The City of Amarillo offers a market competitive total rewards package that includes a base salary in the \$285,000 – \$305,000, vehicle allowance and mobile device reimbursement, and a comprehensive benefit package that includes Medical insurance Exclusive Provider Organization, Dental, Vision, Basic Life Insurance, ADD, Long Term Disability, enrollment in the Texas Municipal Retirement System, 457b Deferred Compensation, and paid time off. Other benefits include Professional dues for professional associations and membership. Relocation assistance may be available.

EDUCATION AND EXPERIENCE

A bachelor's degree from an accredited college or university with major course work in public administration, business administration, economics, or a related field, and ten years of progressively responsible professional experience in municipal government that includes at least five years as a department head, assistant city manager or city manager. A master's degree and professional credentials desired but not required.



APPLICATION PROCESS

This announcement will remain posted until filled. First review of applications begins April 15, 2024.

www.governmentjobs.com/careers/bakertilly

Following the first review date, Baker Tilly will begin the classification of all applications based on the city's established criteria as published in the recruitment brochure. The City of Amarillo may invite select applicants for virtual or onsite interviews after a review of references, background, and academic verifications with applicant's authorization.

For more information, email edward.williams@bakertilly.com or call (214) 842-6478.

The City of Amarillo is an Equal Opportunity Employer.



PUBLIC SECTOR EXECUTIVE RECRUITMENT

2500 Dallas Parkway | Plano, TX | 972-748-0300 | bakertilly.com

Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, February 21, 2024 9:12 AM
To: Williams, Edward
Cc: Edwards, Karen
Subject: RE: City Manager Recruitment Update
Attachments: Amarillo City Manager Narrative - Draft V 2.0_egw with revised sc1 (1).docx

Thanks, Edward. Let me run this by the team and I'll get back with you by the end of the day. A precursory look seems to show some of the incorrect information has been revised, but I'm including a copy of our revisions/comments to the first draft you sent for awareness. Happy Wednesday to you as well.

Thanks!
Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, February 21, 2024 8:31 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: City Manager Recruitment Update

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, February 20, 2024 3:38 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: City Manager Recruitment Update

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Hi Edward,

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Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Friday, February 16, 2024 5:17 PM
To: Stanley, Cole <Cole.Stanley@amarillo.gov>; Craft, Josh <Josh.Craft@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Scherlen, Tom <Tom.Scherlen@amarillo.gov>; Simpson, Les <Les.Simpson@amarillo.gov>
Cc: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>; Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: City Manager Recruitment Update

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Mayor Stanley,
Councilmember Craft,
Councilmember Tipps,
Councilmember Scherlen,
Councilmember Simpson,

Dear Mayor and Councilmembers,

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Amarillo, Texas



City Manager

Career Opportunity

WHO WE ARE

Amarillo (est. pop. 200,393), the 14th most populous city in the Lone Star State, is a vibrant city nestled in

the heart of the Texas Panhandle. Steeped in history and charm, Amarillo's U.S. Route 66–Sixth Street Historic District boasts a blend of art deco and Spanish Revival architecture, creating a captivating backdrop for dining and antique shopping. For those captivated by the equestrian spirit, the American Quarter Horse Hall of Fame & Museum stands as a testament to the celebrated horse breed.

Commented [NM1]: I recommend replacing with a synonym or restructuring since the same word was used in the previous sentence.

Serving as a gateway to the expansive Palo Duro Canyon State Park, where trails wind through stunning landscapes, Amarillo is a haven for nature enthusiasts. The iconic Cadillac Ranch, an installation of graffiti-adorned cars partially submerged in a vast field, adds a touch of whimsy to the city's landscape. The city boasts a thriving arts scene, anchored by esteemed professional organizations such as the renowned Amarillo Symphony, the graceful performances of the Lone Star Ballet, and the captivating productions of the Amarillo Opera.

Dubbed "The Yellow Rose of Texas," the city embodies resilience and vitality. Its diverse economy encompasses industries ranging from ranching and farming to education, banking, oil, and gas, as well as medical and tourism to aerospace manufacturing, earning it the title of "Rotor City, USA" with its V-22 Osprey assembly plant. Additionally, Pantex, the nation's sole nuclear weapons assembly and disassembly facility, stands as a cornerstone of employment and innovation.

Commented [NM2]: Possibly break into two sentences or restructure.

Education in Amarillo is characterized by a steadfast commitment to excellence and innovation. With a diverse range of public, private, and charter schools, as well as esteemed institutions of higher learning, including Amarillo College and West Texas A&M University, the city provides a comprehensive educational system catering to the needs of students at every level. Whether pursuing traditional academics or specialized fields of study, students in Amarillo are nurtured in an environment that fosters intellectual curiosity, critical thinking, and lifelong learning.

Amarillo's rich tapestry of history, culture, and industry makes it a community brimming with allure and promise.

GOVERNMENT

Amarillo, Texas, operates under a Council-Manager form of government. At the helm is the Amarillo City Council, consisting of the mayor and four council members elected at large. The mayor, serving as the presiding officer, and the council members are elected for staggered terms, ensuring continuity in governance two year terms. Together, they City Council sets policies, enacts ordinances, approve the annual budget, and casts the vision for Amarillo oversee the city's operations. Collaborating with the council is the City Manager, who serves as the chief executive officer responsible for implementing policies and

Commented [SC3]: Per the City Charter, all 5 elected positions are elected every other year (in odd years) - not staggered

Commented [SC4]: Council sets the vision - CM oversees operations to achieve that vision

managing ~~day-to-day~~ city operations across various city departments, such as public safety, public works, and parks and recreation. Amarillo's government prioritizes transparency, community engagement, and strategic planning to address the diverse needs and interests of its residents while promoting growth and prosperity in the city.

The City of Amarillo has an AAA rating on its General Obligation bonds, an AA+ rating on its Water and Sewer revenue bonds and Drainage revenue bonds, and an A+ on its Hotel Occupancy Tax bonds, all of which are issued from Standard and Poor's. For Fiscal Year 2023-2024, the City Council approved a \$531.0 million budget that includes \$336.4 million for operation and maintenance functions, \$135.5 million for Capital Improvements, and \$59.2 million for required debt service payments, to sustain a workforce comprising 2,326 Full Time Equivalent positions and 355 Part-Time positions.

Guiding Principles (~~breakout box~~)

- ~~• Create a variety of walkable destinations throughout the city while ensuring convenient local and cross-town connectivity for cars, bikes, and transit.~~
- ~~• Provide a range of housing opportunities with nearby employment and services to support all income levels and age groups.~~
- ~~• Celebrate cultural and historic assets along key corridors and in specific neighborhoods and districts.~~
- ~~• Encourage a diversity of low- to medium-scale places throughout the city.~~
- ~~• Increase overall quality of life for all residents by promoting safe, clean, and protected neighborhoods with well-maintained parks, goods, and services nearby.~~
- ~~• Prioritize reinvestment in existing infrastructure, neighborhoods, districts, and recreational amenities.~~

Commented [SC5]: These bullet points are from our City Vision 2045 Plan that is not yet public. We cannot use them. Recommend bullet pointing our Strategic Plan priorities instead that were approved by Council.

[Click here to view the City of Amarillo's organizational chart.](#)

Commented [SC6]: We will need to provide an updated Organizational Chart. I'll send that via email.

[Click here for more details about the City of Amarillo.](#)

THE CITY MANAGER

The City Manager directs and coordinates the administration of city government in accordance with policies established and approved by the Mayor and City Council by performing duties personally and through department directors. With a \$2,157,651 (FY2023-24) budget and the support of 6-8 direct reports, the city manager:

Commented [SC7]: Recommend referring to "City Council" after the first paragraph describing them as the City Manager reports to Council as a body

- Appoints department directors and staff according to state laws or local ordinances; oversees divisions handling ~~tax collection,~~ law enforcement, public health, public works, and procurement.

Commented [SC8]: Taxes are collected through an outside independent appraisal district not overseen by the city.

Additionally, the city manager prepares and submits annual budgets for approval, plans for future development, and recommends zoning regulations for residential and commercial properties.

- Performs supervisory duties in line with the Amarillo City Charter, policies, and laws, including hiring, performance management, and conflict resolution. Additionally, adept at synthesizing complex information, researching data, and designing workflows.
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OPPORTUNITIES FOR THE NEW CITY MANAGER

The new city manager will have an opportunity to lead one of Texas's most dynamic cities and make a lasting impact on a vibrant community. As such the city manager will lead...

- ✓ **Strategic Planning:** Lead the development implementation of a comprehensive strategic plan, developed by the City Council, that outlines the City's mission, vision, values, goals, and objectives for the future, while engaging with the City Council, internal and external stakeholders to identify key priorities and strategies for achieving them.
- ✓ **Collaboration with Elected Officials:** Develop, maintain, and continuously seek to improve a strong relationship with the City Council and other elected officials and develops policies, programs or initiatives that reflect the vision, needs and values of the community.

- ✓ **High Performing Team:** Build a high performing team, frame, and champion the organization's culture, while inspiring and empowering employees at all levels within the organization to serve with excellence, dedication, innovation, and integrity.
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- ✓ **Team Building and Development:** Establish an employee development plan, and forward-looking workforce development plan that supports the City Council's vision of professional development, recruitment, promotion, and retention of city staff by building a culture of excellence and innovation, while fostering a collaborative workforce where all employees feel empowered, engaged, and willing to contribute their ideas and expertise.
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The new city manager will present a verifiable record of accomplishments in service, effectiveness, efficiencies, and people development. This individual is also a resilient, self-aware professional who welcomes and values divergent perspectives and continuously models and fosters a work culture that

engages and encourages people to do and be their best. Equally as important, the new city manager has unquestionable integrity, honesty, and a reputation as a collaborator.

This proficient manager is a servant leader, ~~has is~~ highly competent and comfortable managing modern and complex principles and best practices of public administration that includes current social, political, and economic trends and operating problems of a municipal government. Furthermore, the next city manager should have strengths in finance and budget, have strengths to allocate resources in a cost-effective manner, and ~~have the ability to~~ gain cooperation in a team setting through discussion and persuasion.

The City Council expects for the new city manager to respect the community and organizational traditions, be committed to, and enjoy being a part of and collaborating with, an engaged community, and demonstrate a commitment to leading the organization forward in a positive direction. The city manager should also be willing and able to identify and respond to public and ~~the~~ City Council issues and concerns, maintain effective working relationships with the City Council, government officials, public agencies, and the public to evaluate and continuously improve city operations and procedures.

EDUCATION AND EXPERIENCE

A bachelor's degree from an accredited college or university with major course work in public administration, business administration, economics, or a related field, and ten years of progressively responsible professional experience in municipal government that includes at least five years as a department head, assistant city manager or city manager. A master's degree and professional credentials desired but not required.

COMPENSATION AND BENEFITS

The City of Amarillo offers a market competitive total rewards package that includes a base salary in the \$285,000 – \$305,000, vehicle allowance and mobile device reimbursement, and a comprehensive benefit package that includes Medical insurance Exclusive Provider Organization, Dental, Vision, Basic Life Insurance, ADD, Long Term Disability, enrollment in the [Texas Municipal Retirement System](#), 457b Deferred Compensation, and paid time off. Other benefits include Professional dues for professional associations and membership. Relocation assistance may be available.

Commented [NM9]: Is there a word missing from this statement or does it need to be reworded?

Commented [NM10]: Is the City providing a communication allowance to be paid bi-weekly or is it reimbursing the CM?

APPLICATION PROCESS

This announcement will remain posted until filled. First review of applications begins April 15, 2024.

<https://www.governmentjobs.com/careers/bakertilly/>

Following the first review date, Baker Tilly will begin the classification of all applications based on the city's established criteria as published in the recruitment brochure. The City of Amarillo may invite select applicants for virtual or onsite interviews after a review of references, background, and academic verifications with applicant's authorization.

For more information, email edward.williams@bakertilly or call (214) 842-6478.

The City of Amarillo is an equal opportunity employer.

Commented [NM11]: Just in case you want to expand this statement, per the personnel rules (as approved by the Civil Service Commission), section 2 - Non-Discrimination: No discrimination shall be exercised, threatened or promised against or in favor of any employee, applicant, competitor, or eligible on the basis of his political opinions or affiliations or religious beliefs or creed, race, color, national origin, sex, gender, gender expression, genetic information, age, marital status, sexual orientation, military status or disability unless it is shown to be a bonafide occupational requirement.

Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, February 22, 2024 9:40 AM
To: Williams, Edward
Cc: Edwards, Karen
Subject: RE: City Manager Recruitment Update

I did not hear anything else back beyond the comments I sent yesterday. Thanks for all your work on it!

Sincerely,

Stephanie Coggins
City Secretary
City of Amarillo
(806) 378-3014

From: Coggins, Stephanie
Sent: Wednesday, February 21, 2024 9:12 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: City Manager Recruitment Update

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Thanks!
Stephanie

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Subject: RE: City Manager Recruitment Update

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Good morning, Stephanie!

I pray all is well with you and yours. Attached is the brochure for your city manager recruitment. Please let me know if you have any suggested edits or concerns. Our goal is to launch the recruitment within the next few days.

Happy Wednesday!

Edward

Edward G Williams
Director



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edward.williams@bakertilly.com | bakertilly.com



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Subject: RE: City Manager Recruitment Update

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Sent: Friday, February 16, 2024 5:17 PM
To: Stanley, Cole <Cole.Stanley@amarillo.gov>; Craft, Josh <Josh.Craft@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Scherlen, Tom <Tom.Scherlen@amarillo.gov>; Simpson, Les <Les.Simpson@amarillo.gov>
Cc: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>; Edwards, Karen <Karen.Edwards@bakertilly.com>
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Mayor Stanley,
Councilmember Craft,
Councilmember Tipps,
Councilmember Scherlen,
Councilmember Simpson,

Dear Mayor and Councilmembers,

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Happy Thursday, Stephanie!

Thank you for your input, suggested edits and follow up. Later today we will send our updated search timeline and brochure to the City Council.

Edward

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Director



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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, March 13, 2024 4:16 PM
To: edward.williams@bakertilly.com
Subject: Checking In

Good afternoon Edward,

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Thank you,

Stephanie Coggins, TRMC
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City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

*"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together"
(Professor William Bennett Munro, Political Scientist - 1934)*

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Director



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To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Checking In

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Good afternoon Edward,

It's been a couple of weeks since we've heard anything, so I'm just checking in to see how the process is going and see if you need any coordination on my end or need anything communicated to Council. We appreciate all of the work that you are putting into this important process for Amarillo.

Thank you,

Stephanie Coggins, TRMC
City Secretary

City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together" (Professor William Bennett Munro, Political Scientist - 1934)

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Monday, April 1, 2024 8:58 PM
To: Williams, Edward
Cc: Edwards, Karen
Subject: Re: This Weeks City Manager Search Update

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Edward

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Director



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Good morning, Stephanie!

30-45 minutes should be plenty.

Happy Tuesday!

Edward

Edward G Williams
Director



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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
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To: Coggins, Stephanie
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Good morning, Stephanie!

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Happy Thursday!

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Director



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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, April 4, 2024 9:32 AM
To: Williams, Edward
Subject: RE: City Manager Finalists selection date confirmation

Hi Edward,

I was able to confirm we can have all of Council available on April 18th at 2:00 p.m. CST. I will visit with the Mayor and Interim City Manager about the agenda for this meeting, but I anticipate it will be an executive session. Please let me know what else you may need from me in coordinating it. Will you be in person for it? Thanks!

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Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Monday, April 1, 2024 2:54 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Simpson, Les <Les.Simpson@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Edwards, Karen <Karen.Edwards@bakertilly.com>
Subject: RE: This Weeks City Manager Search Update

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Hi Edward,

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Sincerely,

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City of Amarillo
(806) 378-3014

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Sent: Friday, March 29, 2024 3:50 PM
To: Stanley, Cole <Cole.Stanley@amarillo.gov>; Craft, Josh <Josh.Craft@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Scherlen, Tom <Tom.Scherlen@amarillo.gov>; Simpson, Les <Les.Simpson@amarillo.gov>
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Looking forward to confirming and continue preparation for this process.

Happy Thursday!

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From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, April 4, 2024 12:12 PM
To: Coggins, Stephanie
Cc: McWilliams, Bryan
Subject: RE: City Manager Finalists selection date confirmation

Flag Status: Flagged

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Thank you, Stephanie!

Below please find the meeting link for the April 18, 2024 - 2:00 PM (Central Standard Time)

[Click here to join this meeting](#)

Meeting ID: 295 558 025 82
Passcode: YykDNC

Best wishes,

Edward

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To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: McWilliams, Bryan <Bryan.Mcwilliams@amarillo.gov>
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That sounds great. Please do not send Council individual virtual invitations, as this would not comply with Texas state law. Due to constraints of the Texas Open Meetings Act, we have to have a quorum present in a physical location where we have published the meeting will take place (City Hall Council Chamber). Once we call the meeting to order, our City Attorney will read us into executive session. All five have confirmed they will be here at City Hall for this meeting.

Please provide me the virtual invitation, and I will connect you to everyone that is physically in our Council Work Room. I will step out once we ensure you are connected.

I am copying our City Attorney for his awareness as well.

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Good morning, Ms. Coggins!

I am hopeful that we will be able to complete our update to the council during our upcoming session and look forward to sharing our update and hearing the council's feedback. At this time, I don't have a need to print any materials, but must again extend my gratitude for your diligence, professionalism, and support during this process.

Please let me know if you need anything else.

Happy Monday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Friday, April 12, 2024 10:19 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Edwards, Karen <Karen.Edwards@bakertilly.com>; McWilliams, Bryan <Bryan.Mcwilliams@amarillo.gov>
Subject: FW: City Council Meeting Agenda Posted for April 18th
Importance: High

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Good morning Mr. Williams,

I'm sharing some information I sent to Council this morning regarding next week for your awareness. I have shared your virtual invitation with our City Attorney, Bryan McWilliams who will join virtually. There will not be any other members of city staff present for this meeting. I anticipate I will get you connected and then step out unless Bryan/Council needs me to take the Certified Agenda minutes of the meeting. Do you have any deliverables you want printed for Council to see during the meeting? Any other needs you have to ensure the success of this meeting? Please let me know, and I will assist as needed.

Sincerely,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

From: Coggins, Stephanie
Sent: Friday, April 12, 2024 10:16 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Hartman, Floyd <Floyd.Hartman@amarillo.gov>; McWilliams, Bryan <Bryan.Mcwilliams@amarillo.gov>
Subject: City Council Meeting Agenda Posted for April 18th
Importance: High

Good morning Mayor and Council,

I have posted the agenda for you work session to meet and discuss the city manager finalist selection next Thursday at 2:00 p.m. It is available on your [Board Portal Website](#), and is available to the public via the [Public Portal](#). The meeting will be held in the Council Chamber/Council Work Room. Mr. Williams, with Baker Tilley, will not be attending in person, so I will help get you connected to him virtually. He anticipates it to be a 30-45 minute meeting. Please let me know if you have any questions or need anything prior to this meeting.

Thank you,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together"
(Professor William Bennett Munro, Political Scientist - 1934)

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, May 1, 2024 2:19 PM
To: Coggins, Stephanie
Cc: McWilliams, Bryan; Thompson, Carrie
Subject: RE: City Manager Search Update

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Thank you, Stephanie for your prompt response.

I will share the lodging option you referenced with the candidates and look forward to your response on reimbursement for business related expenses.

We do have a public engagement component built into this process, but it will likely be after the first round of interviews. Then, the council will invite a smaller group to meet and greet the community. Although, we are still working on the final format. At this point, we are balancing the need of some candidates who may be employed, to notify their employers only if selected and moving to the final stage of the process. As you know, that is a fine balancing act, but I am clear that the council do want the final component to include a community meet and greet.

Let me know if you have any questions or need anything else.

Best wishes,

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
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edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Wednesday, May 1, 2024 2:11 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: McWilliams, Bryan <Bryan.Mcwilliams@amarillo.gov>; Thompson, Carrie <Carrie.Thompson@bakertilly.com>
Subject: RE: City Manager Search Update

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello Edward,

Yes, they can be in executive session. Please note they will be generally defined as “City Manager Candidate Interviews” on the agendas we post to the public. I am unsure of the City’s reimbursement policy for candidate travel. Let me inquire and I’ll reply with that separately. We would recommend you book your candidates at the Embassy Suites, as it is conveniently located across the street from City Hall, where the interviews will take place.

On another note: will there be any community engagement during these two days for the public to meet the finalists and provide feedback to Council? This question was posed by a few citizens at a Council meeting recently, and I would like to provide an answer back to them.

Sincerely,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

City Councilmembers are included on this reply but were moved to BCC to help ensure no walking quorum in violation of the Texas Open Meetings Act.

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, May 1, 2024 1:53 PM
To: Stanley, Cole <Cole.Stanley@amarillo.gov>; Craft, Josh <Josh.Craft@amarillo.gov>; Tipps, Don <Don.Tipps@amarillo.gov>; Scherlen, Tom <Tom.Scherlen@amarillo.gov>; Simpson, Les <Les.Simpson@amarillo.gov>
Cc: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>; McWilliams, Bryan <Bryan.Mcwilliams@amarillo.gov>; Thompson, Carrie <Carrie.Thompson@bakertilly.com>
Subject: City Manager Search Update

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Dear Mayor, Councilmembers:

This email, and any attachments, may constitute a public record of the City of Amarillo, and may be subject to public disclosure under the Texas Public Information Act.

Please do not "reply all" to this e-mail.

Below please find the proposed in-person interviews schedule for Tuesday, May 14 and Wednesday, May 15, 2024, in Amarillo, TX. We have begun preparations for this next step in our process, which includes notifications to the candidates, background request authorization, assignment of TTI Disc leadership assessment, reference and academic verification, media, online presence and activities report, draft suggested interview questions and candidate evaluation document.

Please confirm that interviews will be in executive session. More details will be forthcoming, but for now, please mark your calendars and let me know if you need anything from us as you prepare for these six (6) interviews. In the meantime, I will also notify the candidates that within the next 8-10 days, the city may release their names to the public.

Ms. Coggins, please provide me with your travel reimbursement policy, which we will share with those candidates who may require travel and or lodging to participate in this process. Also, please let me know if the city has a preferred hotel for the candidates.

City of Amarillo, Texas		
City Manager Interviews		
Tuesday, May 14, 2024 - Council Chambers		
Start	Finish	Interview with Council
8:00 AM	8:15 AM	Briefing
8:30 AM	10:15 AM	Candidate 1
10:30 AM	12:15 PM	Candidate 2
12:30:PM		Adjourn

Wednesday, May 15, 2024		
8:00 AM	8:15 AM	Briefing
8:30 AM	10:15 AM	Candidate 3
10:30 AM	12:15 PM	Candidate 4
12:30 PM	12:55 PM	Lunch
1:00 PM	2:45 PM	Candidate 5
3:00 PM	4:45 PM	Candidate 6
5:00 PM	5:25 PM	DISC - Gap & Talent
5:30 PM		Adjourn

Please let me know if you have any questions.

Edward

Edward G Williams
Director



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 T: +1 (214) 842 6478 | M: +1 (214) 608 6363
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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, May 2, 2024 2:16 PM
To: edward.williams@bakertilly.com
Subject: Reimbursement for Candidate Travel

Edward,

We do not have a formal policy to share with candidates, but here is what our prior practice has been:

Historically, we have paid the hotel and flight costs if an applicant booked themselves. We have, however, also booked the room for out of town applicants. We have worked with embassy. I think we complete a form with the hotel to charge our city card. And I think we set restrictions (like you can't charge room service, etc)

If you would like us to book any rooms, I will need information for the candidates whom would like that assistance. Otherwise, you can have them provide receipts, and you may submit them to us for reimbursement.

Thank you,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, May 2, 2024 4:54 PM
To: Coggins, Stephanie
Subject: RE: Reimbursement for Candidate Travel

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Thank you, Stephanie!

I will share the information with the candidates. It may be a good idea to allow the candidates to book their flights, and the city reimburse them for business related expenses. Regarding the lodging, if they have not already done so, I will suggest that they stay at the Embassy Suites, but they make alternative arrangements for this process.

We will continue to communicate and accommodate the various moving parts and adjust as the need emerges.

Thank you for your support and prompt response.

Best wishes,

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, May 2, 2024 2:16 PM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Reimbursement for Candidate Travel

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Edward,

We do not have a formal policy to share with candidates, but here is what our prior practice has been:

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If you would like us to book any rooms, I will need information for the candidates whom would like that assistance. Otherwise, you can have them provide receipts, and you may submit them to us for reimbursement.

Thank you,

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P O Box 1971
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Coggins, Stephanie

From: Zelinka, Al <Al.Zelinka@bakertilly.com>
Sent: Tuesday, May 7, 2024 7:50 AM
To: Hartman, Floyd; Williams, Edward
Cc: Jacobs, Carol; Coggins, Stephanie; Clark, Shauna
Subject: Re: Governance & Ends Policies Follow up

You don't often get email from al.zelinka@bakertilly.com. [Learn why this is important](#)

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Floyd and Stephanie. I left a message yesterday afternoon with Donna indicating Shauna Clark and I can remotely attend the 8:30am Amarillo City Council meeting on Thursday. Please email or call me at (714) 815-6403 to coordinate any background and insights for our role in the meeting so that we are prepared and meet expectations.; alternatively, we would be happy to participate in a remote prep meeting with you today or tomorrow -- please provide any times that you have available. Thank you, Al

From: Hartman, Floyd <Floyd.Hartman@amarillo.gov>
Sent: Monday, May 6, 2024 11:06 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>; Jacobs, Carol <Carol.Jacobs@bakertilly.com>; Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Governance & Ends Policies Follow up

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Good Edward, I left you a phone message. I wanted to discuss the possibility of getting someone to join us this Thursday at 8:30 a.m. via teams to help facilitate the Council meeting to discuss the Charter. The Council will be bringing their topics to this meeting.

Floyd Hartman
Interim City Manager
City of Amarillo
601 S. Buchanan
Amarillo, TX 79105
806-378-9086
floyd.hartman@amarillo.gov

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Tuesday, April 23, 2024 4:23 PM
To: Hartman, Floyd <Floyd.Hartman@amarillo.gov>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>; Jacobs, Carol <Carol.Jacobs@bakertilly.com>
Subject: Governance & Ends Policies Follow up

You don't often get email from edward.williams@bakertilly.com. [Learn why this is important](#)

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Mr. Hartman,

I pray you are having a great day. The purpose of this note is twofold. First, I want to introduce you to members of our team who are prepared to provide you with a proposal for your Governance & Ends Policies, and related consulting services you may find of interest. Carol, and Al are accomplished public sector executives who welcome the opportunity to work with you, and the Amarillo City Council. Secondly, I want to circle back to ensure that Carol and Al have the most detailed information about your current or projected need.

[Carol Jacobs](#),

[Al Zelinka](#),

Please let us know if you have questions or need anything from us at this point. For example, do you have an RFP or details of your desired services? Would you like to schedule a brief Teams meeting to discuss the above?

We are looking forward to working with you and your team.

Best wishes,

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
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edward.williams@bakertilly.com | bakertilly.com



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Coggins, Stephanie

From: Zelinka, Al <Al.Zelinka@bakertilly.com>
Sent: Tuesday, May 7, 2024 9:02 AM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council Work Session Prep Meeting

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Coggins, Stephanie

From: Zelinka, Al <Al.Zelinka@bakertilly.com>
Sent: Tuesday, May 7, 2024 9:23 AM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council Work Session Prep Meeting

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Tuesday, May 7, 2024 10:38 AM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council Work Session Prep Meeting

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Tuesday, May 7, 2024 11:00 AM
To: edward.williams@bakertilly.com
Subject: Next Week

Hi Edward,

Will you be in attendance next week in person for the candidate interviews? I'm going to have our admin order lunch for Council on the 15th and would like to be sure we have some for you too if you'll be here.

Thanks,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
P O Box 1971
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stephanie.coggins@amarillo.gov
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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, May 8, 2024 11:15 AM
To: Williams, Edward
Subject: RE: Next Week

Sounds great. I look forward to meeting you. Do you have any food allergies or anything we should stay away from when ordering?

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, May 8, 2024 10:56 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Next Week

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Good morning, Stephanie!

I am scheduled to be in Amarillo for the interviews. Thank you, for the lunch offer. Looking forward to meeting you, the other members of your organization, and a great process.

Happy Wednesday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
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edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, May 7, 2024 11:00 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Next Week

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Will you be in attendance next week in person for the candidate interviews? I'm going to have our admin order lunch for Council on the 15th and would like to be sure we have some for you too if you'll be here.

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"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together"
(Professor William Bennett Munro, Political Scientist - 1934)

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 8, 2024 3:03 PM
To: Coggins, Stephanie
Cc: Zelinka, Al
Subject: Comparison cities
Attachments: Amarillo comparison city request_az.docx

Flag Status: Flagged

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Hello Stephanie:

It was very nice to meet you today. I am looking forward to this project.

In Charter efforts in other cities, we used a list of cities to compare with the city we were working in. Since you offered to get some data, I put together the attached memo of what we need. If this request is too much, just let me know what you would like to eliminate. Thank you.

Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



Baker Tilly US, LLP

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11150 Santa Monica Blvd. St. 600 Los Angeles CA 90025

shauna.clark@bakertilly.com | [bakertilly.com](https://www.bakertilly.com)

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To: Stephanie Coggins, Amarillo City Secretary

From: Shauna Clark, Baker Tilly
Al Zelinka, Baker Tilly

Subject: Comparison city information

Date: May 8, 2024

We touched on the subject of comparison city data for Amarillo charter meetings, and you said you can help us get the data. If you can, here is what we need.

1. We are working on a charter in California and are using nine comparison cities from the total 482 cities. Texas has 1,221 municipalities, almost three times that number. Can you select about nine comparison cities, or do you think more/less are needed?
2. Please indicate how you chose your cities.
3. Here is some form of governing information we would need from each city
 - Home Rule (i.e., Charter) city? If not, what type (i.e. General Law)?
 - Form of government: Council/Manager, Mayor/Council, commission?
 - Other elected officials each city, e.g., City Attorney
 - Number of council members?
 - Districts or no districts?
 - Timing of elections – odd years, even years, county consolidation?
 - Is the Mayor a member of council or is the Mayor directly elected specifically to serve as mayor?
 - Is there a Vice Mayor or Mayor Pro Tempore? If so, how were they chosen?
 - Voting power – Mayor votes?
 - Length of terms
 - Recall provisions (if any)
 - Any term limits? If so, what are they

NOTE, one way to get voters to sign off on longer term length, would be to add in term limits. Almost every city in California has a four-year term for council and mayor. About 37% have term limits—usually three terms or twelve years.

4. Demographic and financial information

- Population
- Total budget
- Total general fund budget

5. Other data that might be helpful.

Thank you very much.

Coggins, Stephanie

From: Zelinka, Al <Al.Zelinka@bakertilly.com>
Sent: Wednesday, May 8, 2024 8:01 PM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council - Special Work Session

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 8, 2024 11:02 AM
To: Coggins, Stephanie; Hartman, Floyd
Subject: Shauna Clark Resume
Attachments: Clark Shauna resume 2024.docx

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Dear Floyd and Stephanie:

My resume is attached. You will notice that I worked for the Los Angeles Host Committee to host the Democratic National Convention in 2000, which might cause some concern in Amarillo.

I did not work for the Democratic party. In fact, I was a Republican and worked for a committee, just like a host committee for the Olympics.

**Shauna Clark | Public Sector Advisory
Consultant**



Baker Tilly US, LLP

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11150 Santa Monica Blvd. St. 600 Los Angeles CA 90025

shauna.clark@bakertilly.com | [bakertilly.com](https://www.bakertilly.com)

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Wednesday, May 8, 2024 6:24 AM
To: Zelinka, Al <Al.Zelinka@bakertilly.com>; Hartman, Floyd <Floyd.Hartman@amarillo.gov>; Clark, Shauna <Shauna.Clark@bakertilly.com>
Subject: RE: Amarillo City Council Work Session Prep Meeting

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Al and Shauna,

To aid in the transition of the Charter review facilitation to you, I've attached several files I think will be helpful to let you see what we've done thus far. Also below are links to where Council discussed this item twice in their recent meetings. Look forward to talking more with you shortly.

4/9/24: <https://amarillotx.new.swagit.com/videos/302121?ts=5036>

4/23/24: <https://amarillotx.new.swagit.com/videos/303539?ts=3737>

Thanks!

Stephanie Coggins, TRMC
City Secretary

City of Amarillo
(806) 378-3014

-----Original Appointment-----

From: Coggins, Stephanie

Sent: Tuesday, May 7, 2024 9:01 AM

To: Coggins, Stephanie; Zelinka, Al; Hartman, Floyd; Clark, Shauna

Subject: Amarillo City Council Work Session Prep Meeting

When: Wednesday, May 8, 2024 8:30 AM-9:00 AM (UTC-06:00) Central Time (US & Canada).

Where: Microsoft Teams Meeting

Microsoft Teams [Need help?](#)

[Join the meeting now](#)

Meeting ID: 299 683 233 957

Passcode: aLySds

For organizers: [Meeting options](#) [Reset dial-in PIN](#)

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SHAUNA CLARK

696 E. California Boulevard

Pasadena, CA 91106

(626) 429-1990 shaunaclark1@gmail.com

shauna.clark@bakertilly.com

PRIVATE AND PUBLIC SECTOR EXPERIENCE

Special Advisor at Baker Tilly US www.bakertilly.com. **2016 to present.** The Public Sector Advisory Group is engaged by cities, counties, and special districts to perform organizational analyses, introduce best practices, and process improvement. Completed projects in more than 15 cities. **Currently: Special Advisor to the City of Pasadena Charter Study Task Force**

Fiscal Analysis – Mining Industry

Perform fiscal and economic impact analysis. In 2002, completed a fiscal impact study for Equinox Gold <https://equinoxgold.com/> on Phase 2 of Castle Mountain Mine in the Mojave Desert. Other clients: Molycorp, Mitsubishi mining.

California State University, Northridge CSUN - 2004 to present.

Teach graduate courses in the MPA program: Organizational Development, Economic Development, Budgeting and Finance, and HR Management.

City Manager/City of La Habra Heights -November 2007 to July 2016.

Managed day-to-day operations of low-density city that had a volunteer fire department and faced complications with hillside development in a very high fire hazard zone. Improved City's financial standing and reporting. Revised entitlement process. Introduced new technology.

CONSULTING HISTORY – 1997 to 2007

City of Los Angeles Elected Charter Reform Commission:

July 1997 to March 1999. **Policy Consultant to Elected Charter Reform Commission.** Served on Task Forces and Committees and provided financial analysis, research, reports, recommendations, and proposed Charter language. Policy areas included: form of government, financial and economic development processes, land use planning and election.

Los Angeles Millennium Celebration

Project Manager/Producer: Los Angeles Millennium Celebration and Governor's Ball. Managed fundraising, talent contracts, logistics, and other aspects of Y2K citywide celebration.

LA Convention 2000 Host Committee

April to Dec 2000. **Managing Director of Operations, LA Convention 2000.** Worked for the Los Angeles Host Committee that included Richard Riordan, Magic Johnson, Eli Broad and others to host the 2000 Democratic National Convention.

City of Pasadena

May 2001 to June 2002. Consultant assigned to gain citizen and council approval in initial (pre-construction) phase of the \$110 million Pasadena City Hall Seismic Retrofit and Rehabilitation Project. Coordinated work of architects, engineers, and others assigned to project. Provided staff support for two citizens committees: Oversight and Finance. Achieved grant funding.

ECAP Inc. (Private economic consulting firm)

- Researched fiscal impact of the Clean Air Action Plan for the Ports of LA and Long Beach.
- Aided in the preparation of Annual Economic updates for cities in southern California.
- Analyzed economic and environmental impact of goods movement through Ports of Los Angeles and Long Beach.

California Portland Cement Company (CPCC)

Analyzed economic impact of CPCC operations in Inland Empire. Assisted in Five-Year Business Expansion Plan for Five Regions, California, Arizona, Washington, Oregon, and Idaho for parent company Taiheiyo of Japan. Analyzed economic impact of \$35 million import and distribution terminal at Port of Stockton.

County of San Bernardino -Feb. 2004 to Dec. 7, 2004:

Chief of Staff to interim County Supervisor. Managed day-to-day operations. Developed policies and plans including economic development strategy, programs, projects, and budgets.

The Tomás Rivera Policy Institute – University of Southern California:

Project Manager Administrator and policy advisor for 22-member California Endowment Agricultural Worker Health. Completed a study funded by Rockefeller Foundation on the financial wellbeing of Latino non-profit organizations within California. Conducted studies for State Senate and others on best practices of community policing within Southern California.

1990-1997. City Administrator/ City of San Bernardino

Managed a full-service city with a population of 190,000, 1100+ employees, 16 major departments and a budget exceeding \$100 million. Developed city's overall financial policies and economic strategies. Established and directed the missions, goals, and objectives of traditional city departments such as Police, Fire, Public Works, Water, Parks and Recreation, Planning and Building Services, Redevelopment, Refuse, Human Resources, Risk Management

EDUCATION

MBA (Finance) – CSUSB June 1983

BA Public Administration – CSUSB June 1980

Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 8, 2024 3:22 PM
To: Coggins, Stephanie
Cc: Zelinka, Al
Subject: Length of terms of offices for US cities

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Stephanie:

You mentioned the three-year terms, so I am sending this along. Maybe it will be helpful. BTW, if you want us to present this, let us know.

Table 1. ICMA Information on Length of Mayor's term of office

Term of Office for Mayor	Survey Responses – Percent of cities with each term length
One Year	14%
Two Year	35%
Three Year	6%
Four Year	45%
Other	<1%

Based on the ICMA article, as of 2008, less than 1% of survey respondents said their cities had a term limit for mayor that exceeded four years.

**Shauna Clark | Public Sector Advisory
Consultant**



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shauna.clark@bakertilly.com | bakertilly.com

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, May 8, 2024 10:56 AM
To: Coggins, Stephanie
Subject: RE: Next Week

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.
Good morning, Stephanie!

I am scheduled to be in Amarillo for the interviews. Thank you, for the lunch offer.
Looking forward to meeting you, the other members of your organization, and a great process.

Happy Wednesday!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | [bakertilly.com](https://www.bakertilly.com)



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, May 7, 2024 11:00 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Next Week

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Will you be in attendance next week in person for the candidate interviews? I'm going to have our admin order lunch for Council on the 15th and would like to be sure we have some for you too if you'll be here.

Thanks,

Stephanie Coggins, TRMC

City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together"
(Professor William Bennett Munro, Political Scientist - 1934)

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Coggins, Stephanie

From: Locey, Mary <Mary.Locey@bakertilly.com>
Sent: Wednesday, May 8, 2024 9:13 PM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council - Special Work Session

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Thursday, May 9, 2024 8:04 AM
To: Clark, Shauna
Cc: Zelinka, Al
Subject: RE: Comparison cities

Shauna,

Here are a list of the comparative cities I recommend we use, with Amarillo listed in the middle:

City	Population
El Paso	683,577
Arlington	398,864
Plano	291,296
Lubbock	264,000
Laredo	263,640
Amarillo	201,234
Brownsville	199,062
Grand Prairie	197,590
Killeen	156,261
Mesquite	150,184
Waco	141,377

I chose them as the 10 cities closest to Amarillo in population. They are also all home-rule cities with a charter. If this seems reasonable, we will work to put together the research in the memo on each of the cities and return that to you soon.

Sincerely,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 8, 2024 3:03 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>
Subject: Comparison cities

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Hello Stephanie:

It was very nice to meet you today. I am looking forward to this project.

In Charter efforts in other cities, we used a list of cities to compare with the city we were working in. Since you offered to get some data, I put together the attached memo of what we need. If this request is too much, just let me know what you would like to eliminate. Thank you.

Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



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shauna.clark@bakertilly.com | bakertilly.com

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Coggins, Stephanie

From: Zelinka, AI <AI.Zelinka@bakertilly.com>
Sent: Thursday, May 9, 2024 8:08 AM
To: Coggins, Stephanie; Clark, Shauna
Subject: RE: Comparison cities

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails. Thanks, Stephanie. I am comfortable with this list and will await Shauna's feedback. Thanks.

AI Zelinka, FAICP, CMSM
Director



Baker Tilly US, LLP
M: +1 (714) 815 6403
18500 Von Karman Avenue, 10th Floor, Irvine, California, 92612 USA
al.zelinka@bakertilly.com | [bakertilly.com](https://www.bakertilly.com)

[Schedule a meeting](#)



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Thursday, May 9, 2024 6:04 AM
To: Clark, Shauna <Shauna.Clark@bakertilly.com>
Cc: Zelinka, AI <AI.Zelinka@bakertilly.com>
Subject: RE: Comparison cities

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Shauna,

Here are a list of the comparative cities I recommend we use, with Amarillo listed in the middle:

City	Population
El Paso	683,577
Arlington	398,864
Plano	291,296
Lubbock	264,000
Laredo	263,640
Amarillo	201,234
Brownsville	199,062
Grand Prairie	197,590
Killeen	156,261

Mesquite 150,184
Waco 141,377

I chose them as the 10 cities closest to Amarillo in population. They are also all home-rule cities with a charter. If this seems reasonable, we will work to put together the research in the memo on each of the cities and return that to you soon.

Sincerely,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 8, 2024 3:03 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>
Subject: Comparison cities

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Hello Stephanie:

It was very nice to meet you today. I am looking forward to this project.

In Charter efforts in other cities, we used a list of cities to compare with the city we were working in. Since you offered to get some data, I put together the attached memo of what we need. If this request is too much, just let me know what you would like to eliminate. Thank you.

Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Thursday, May 9, 2024 8:21 AM
To: Coggins, Stephanie
Subject: Accepted: Amarillo City Council - Special Work Session

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Coggins, Stephanie

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Thursday, May 9, 2024 11:24 AM
To: Coggins, Stephanie
Subject: RE: Next Week

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.
Good morning, Stephanie!

No food allergies or similar concerns.

Let's make today a great day!

Edward

Edward G Williams
Director



Baker Tilly US, LLP
T: +1 (214) 842 6478 | M: +1 (214) 608 6363
17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Wednesday, May 8, 2024 11:15 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: RE: Next Week

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Sounds great. I look forward to meeting you. Do you have any food allergies or anything we should stay away from when ordering?

From: Williams, Edward <Edward.Williams@bakertilly.com>
Sent: Wednesday, May 8, 2024 10:56 AM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Subject: RE: Next Week

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Good morning, Stephanie!

I am scheduled to be in Amarillo for the interviews. Thank you, for the lunch offer. Looking forward to meeting you, the other members of your organization, and a great process.

Happy Wednesday!

Edward

Edward G Williams
Director



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17 Cowboys Way, Suite 800, Frisco, TX, 75034
edward.williams@bakertilly.com | bakertilly.com



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From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Tuesday, May 7, 2024 11:00 AM
To: Williams, Edward <Edward.Williams@bakertilly.com>
Subject: Next Week

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Edward,

Will you be in attendance next week in person for the candidate interviews? I'm going to have our admin order lunch for Council on the 15th and would like to be sure we have some for you too if you'll be here.

Thanks,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
P O Box 1971
Amarillo, TX 79105
stephanie.coggins@amarillo.gov
O: (806) 378-3014
C: (806) 282-1584

City Secretary

"No other office in municipal service has so many contacts, It serves the mayor, the city council, the city manager, and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together"
(Professor William Bennett Munro, Political Scientist - 1934)

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Monday, May 13, 2024 1:34 PM
To: Coggins, Stephanie
Cc: Zelinka, Al; Locey, Mary; Hawkins, Dennis
Subject: Questions about the conduct of elections

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Stephanie:

I am sorry for this long email and the number of questions I have. I tried to find answers online, but some things are not clear to me.

1. Is it correct that elections for city officials are held in May of odd-numbered years?
2. Does the county conduct those elections on behalf of cities? If so, can you give me a rough idea of the cost?
3. If there is no majority for a seat, Amarillo is mandated to conduct a runoff election. Would **you** conduct the runoff as a standalone, meaning you could not join a county election but would contract with them for equipment, etc?
4. Approximately how often do you conduct a runoff?
5. Your council members have Places. If someone new runs for council, do they run for a particular Place against that incumbent or is the pool open? In other words, do they run for office against a pool of candidates and if they are one who gets a majority, they are elected to a nonspecific place?
6. If a charter change is ready for the November presidential, you contract with the county to join that election, correct?
7. Are the governor's elections held in May and November of even years, or do those months only apply to the presidential election cycle?
8. If you went to three years terms, you would have an election every year. Some would run in even years and others in odd years. If this the correct complete cycle for three-year terms?
9. If you went through a complete three-year election cycle, would it look like this?

Three-year terms -- election cycles – first election through last runoff		
Assumes runoff for every election		
Nov 2024 – Presidential	Adopt three-year terms	One election e
May 2025 - City	Mayor and Place 1 – first election	Term ends Ma
TBD – runoff	Mayor and Place 1	
May 2026 – Gov. primary	Place 2 and 3	Term ends Ma
Runoff TBD	Place 2 and 3	

May 2027 – City	Place 4 – first election		Term ends Ma
TBD – runoff	Place 4 runoff		
May 2028 – Pres primary	Mayor and Place 1 – first re-election		Term ends Ma
TBD 2028	Mayor and Place 1 - Runoff		
May 2029 – City	Place 2 and 3 primary (first re-election		May 2032
TBD	Place 2 and 3 runoff		
May 2030 – Gov Primary	Place 4 (first re-election)		May 2033
TBD	Place 4 runoff		
First cycle completed in 12 elections, six years			
Six conducted without county support			

10. If Candidate A failed to win an election when the Mayor and Place 1 were having their elections, could Candidate A run the next year when Places 2 and 3 run, and then again the following year when Place 4 runs?

Thank you very much. I am working to explain how costly and onerous a three year term would be.

If you know of any cities that have three-year terms, could you contact their election officials to see what that experience is like, perhaps even before and after the three-year terms were imposed, if they were there long enough? If this is something you do not have time to do, would you point me in the right direction?

Thanks again.

**Shauna Clark | Public Sector Advisory
Consultant**



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shauna.clark@bakertilly.com | bakertilly.com

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Tuesday, May 14, 2024 10:27 AM
To: Coggins, Stephanie
Cc: Zelinka, Al; Hawkins, Dennis; Locey, Mary
Subject: Comparison data from 2013

Flag Status: Flagged

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Stephanie: This is what I have pieced together from a newspaper article that Al found. I believe the article is from 2013 so the table needs an update.

I am writing a report to the committee which I will send for your review. I inserted this table as a placeholder.

Table 1. Comparative data from ten Texas home rule cities

City	Size	Total Seats	Single Member	At Large	Term Years	Staggered
El Paso	683,577					
Arlington	398,864					
Plano	291,296	Mayor + 7	6	Mayor	Two/Four	Every 2
Lubbock	264,000	Mayor + 6	6	Mayor + 3	Four	Every 2
Laredo	263,640	Mayor + 8	8	Mayor	Four	Every 2
Amarillo	201,234	Mayor + 4	0	Mayor + 4	Two	No
Brownsville	199,062	Mayor + 6	4	Mayor + 2	Four	Every 2
Grand Prairie	197,590	Mayor + 8	6	Mayor + 2	Three	Each year
Killeen	156,261					
Mesquite	150,184					
Waco	141,377					

Each year: 1 at large, two single-member

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, May 15, 2024 5:12 PM
To: Clark, Shauna
Cc: Zelinka, Al; Hawkins, Dennis; Locey, Mary
Subject: RE: Proposition B 2021 4 year terms
Attachments: Preview Ballot Language -2020_November_3_Special_Election (Randall County).pdf

Here is the ballot language – it was Prob B on the 2020 ballot. I don't know where to locate any arguments for and against it, but I do have some comparative city information that was provided to the committee last time if that might be helpful.

Thanks,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 4:46 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>; Hawkins, Dennis <Dennis.Hawkins@bakertilly.com>; Locey, Mary <Mary.Locey@bakertilly.com>
Subject: Proposition B 2021 4 year terms

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Stephanie: Where would I find the 2021 sample ballot language and arguments for and against Proposition B for extending council terms to four years?

**Shauna Clark | Public Sector Advisory
Consultant**



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Preview Ballot

09/04/2020 16:16:44

2020 General Election and City of Amarillo Special Election

Elección general de 2020 y elección especial de la ciudad de Amarillo

RANDALL COUNTY, TEXAS CONDADO DE RANDALL, TEXAS

Precinct 112 CITY Precinta 112 CITY

November 3, 2020 3 de noviembre de 2020

Page 2 of 2 Pagina 2 de 2

CITY OF AMARILLO SPECIAL ELECTION
ELECCIÓN ESPECIAL DE LA CIUDAD DE
AMARILLO

Proposition A

Proposición A

Vote FOR or AGAINST

Vote A FAVOR o EN CONTRA

"The issuance of \$275,000,000 General
Obligation Bonds for Convention
Center Facilities Expansion and
Improvement and the Imposition of a
Tax Sufficient to Pay the Principal of
and Interest on the Bonds."

"La emisión de \$275,000,000 de Fianza
de Obligación General para la
Ampliación y Mejora de las
Instalaciones del Centro de
Convenciones y la Imposición de un
Impuesto Suficiente para Pagar el
Principal y los Intereses de las fianzas
general."

FOR A FAVOR

AGAINST EN CONTRA

Proposition B

Proposición B

Vote FOR or AGAINST

Vote A FAVOR o EN CONTRA

To amend Article V, Section 2 of the
Amarillo City Charter to provide for a
4-year term of office for Mayor and
each City Councilmember with those
terms being staggered as provided by
ordinance and conforming
amendments as required by state law.

Enmendar el Artículo V, Sección 2 de
los Estatutos de la Ciudad de Amarillo
para proporcionar un mandato de 4
años para el Alcalde y cada Concejal de
la Ciudad con esos términos
escalonados según lo dispuesto por la
ordenanza y las enmiendas de
conformidad requeridas por la ley
estatal.

FOR A FAVOR

AGAINST EN CONTRA

Proposition C

Proposición C

Vote FOR or AGAINST

Vote A FAVOR o EN CONTRA

To amend Article V, Section 12(a) of the
Amarillo City Charter to provide for the
Mayor and Councilmembers to meet to
qualify for office on the day of the
election canvass and thereafter meet
not less than twenty-four times per
calendar year.

Enmendar el Artículo V, Sección 12 (a)
de la Carta Constitutiva de la Ciudad de
Amarillo para disponer que el Alcalde y
los Concejales se reúnan para calificar
para el cargo el día del escrutinio
electoral y luego se reúnan no menos
de veinticuatro veces por año
calendario.

FOR A FAVOR

AGAINST EN CONTRA

Approved by F. J. Hibler

Date: 9/8/20

18765

Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 6:19 PM
To: Coggins, Stephanie
Cc: Zelinka, Al; Hawkins, Dennis; Locey, Mary
Subject: RE: Proposition B 2021 4 year terms

Flag Status: Completed

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Stephanie:

Thank you. This is helpful.

I am trying to find the sample ballots to see the arguments for and against so I can read what the public saw as pros and cons. I'll keep looking.

**Shauna Clark | Public Sector Advisory
Consultant**



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11150 Santa Monica Blvd. St. 600 Los Angeles CA 90025

shauna.clark@bakertilly.com | [bakertilly.com](https://www.bakertilly.com)

From: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Sent: Wednesday, May 15, 2024 3:12 PM
To: Clark, Shauna <Shauna.Clark@bakertilly.com>
Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>; Hawkins, Dennis <Dennis.Hawkins@bakertilly.com>; Locey, Mary <Mary.Locey@bakertilly.com>
Subject: RE: Proposition B 2021 4 year terms

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Here is the ballot language – it was Prob B on the 2020 ballot. I don't know where to locate any arguments for and against it, but I do have some comparative city information that was provided to the committee last time if that might be helpful.

Thanks,

Stephanie Coggins, TRMC
City Secretary
City of Amarillo
(806) 378-3014

From: Clark, Shauna <Shauna.Clark@bakertilly.com>

Sent: Wednesday, May 15, 2024 4:46 PM

To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>

Cc: Zelinka, Al <Al.Zelinka@bakertilly.com>; Hawkins, Dennis <Dennis.Hawkins@bakertilly.com>; Locey, Mary <Mary.Locey@bakertilly.com>

Subject: Proposition B 2021 4 year terms

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Stephanie: Where would I find the 2021 sample ballot language and arguments for and against Proposition B for extending council terms to four years?

**Shauna Clark | Public Sector Advisory
Consultant**



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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 4:46 PM
To: Coggins, Stephanie
Cc: Zelinka, Al; Hawkins, Dennis; Locey, Mary
Subject: Proposition B 2021 4 year terms

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Stephanie: Where would I find the 2021 sample ballot language and arguments for and against Proposition B for extending council terms to four years?

**Shauna Clark | Public Sector Advisory
Consultant**



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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 9:38 PM
To: Coggins, Stephanie
Cc: Hawkins, Dennis; Locey, Mary; Zelinka, Al
Subject: Amarillo -- Randall, Potter, both?

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Stephanie:

Is Amarillo in two counties? Sometimes I see Randall County and other times I see Potter County.

Thank you. Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Wednesday, May 15, 2024 10:04 PM
To: Clark, Shauna
Cc: Hawkins, Dennis; Locey, Mary; Zelinka, Al
Subject: Re: Amarillo -- Randall, Potter, both?

Yes, it is. We contract with both counties for our elections. FYI, my office have been working to validate a petition, and we finished that process today. So tomorrow my goal is to knock out some of the emails you've sent which will include more information about how we contract and the cost.

Thanks!
Stephanie

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From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 9:37:41 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Hawkins, Dennis <Dennis.Hawkins@bakertilly.com>; Locey, Mary <Mary.Locey@bakertilly.com>; Zelinka, Al <Al.Zelinka@bakertilly.com>
Subject: Amarillo -- Randall, Potter, both?

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Stephanie:

Is Amarillo in two counties? Sometimes I see Randall County and other times I see Potter County.
Thank you. Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Thursday, May 16, 2024 1:02 AM
To: Coggins, Stephanie
Cc: Hawkins, Dennis; Locey, Mary; Zelinka, Al
Subject: Re: Amarillo -- Randall, Potter, both?

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails. Stephanie. No worries. I was city clerk for 12 years. I know how busy you can get.

On May 15, 2024, at 8:03 PM, Coggins, Stephanie <Stephanie.Coggins@amarillo.gov> wrote:

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Yes, it is. We contract with both counties for our elections. FYI, my office have been working to validate a petition, and we finished that process today. So tomorrow my goal is to knock out some of the emails you've sent which will include more information about how we contract and the cost.

Thanks!
Stephanie

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From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Wednesday, May 15, 2024 9:37:41 PM
To: Coggins, Stephanie <Stephanie.Coggins@amarillo.gov>
Cc: Hawkins, Dennis <Dennis.Hawkins@bakertilly.com>; Locey, Mary <Mary.Locey@bakertilly.com>; Zelinka, Al <Al.Zelinka@bakertilly.com>
Subject: Amarillo -- Randall, Potter, both?

Attention: This email was sent from someone outside of City of Amarillo. Always use caution when opening attachments or clicking links from unknown senders or when receiving unexpected emails.

Stephanie:
Is Amarillo in two counties? Sometimes I see Randall County and other times I see Potter County.
Thank you. Shauna

**Shauna Clark | Public Sector Advisory
Consultant**

<image001.png>

Baker Tilly US, LLP

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11150 Santa Monica Blvd. St. 600 Los Angeles CA 90025

shauna.clark@bakertilly.com | bakertilly.com

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Coggins, Stephanie

From: Coggins, Stephanie
Sent: Saturday, May 18, 2024 8:46 AM
To: Zelinka, Al
Subject: Accepted: Review Working Administrative Draft Charter Review Citizens Committee Report

Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Sunday, May 19, 2024 7:59 PM
To: Coggins, Stephanie; Hartman, Floyd
Subject: DRAFT report Amarillo_CharterReview_2024-May 30 Report to Committee (003)
Attachments: Amarillo_CharterReview_2024-May 30 Report to Committee (003).docx

Flag Status: Flagged

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Dear Stephanie and Floyd

Here is a draft of a report to the Amarillo Charter Committee for discussion on Monday.

Shauna

**Shauna Clark | Public Sector Advisory
Consultant**



Baker Tilly US, LLP

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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Monday, May 20, 2024 8:20 AM
To: Coggins, Stephanie; Hartman, Floyd
Cc: Zelinka, Al
Subject: AmarilloCharterMay30Agemda
Attachments: AmarilloCharterMay30Agemda.docx

Flag Status: Flagged

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Good Morning

Here is a draft agenda for the May 30 meeting. Please feel free to edit

Shauna

**Shauna Clark | Public Sector Advisory
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Coggins, Stephanie

From: Clark, Shauna <Shauna.Clark@bakertilly.com>
Sent: Tuesday, May 21, 2024 9:04 AM
To: Hartman, Floyd; Coggins, Stephanie; Zelinka, Al; Locey, Mary
Subject: Review City Attorney section added to the report

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City Attorney

Should the City Attorney report to the Mayor and Council or the City Manager.

Whereas the City Manager takes direction from and represents the interests of the Council as a whole; the City Attorney represents the interests of the City as a whole. The City Attorney and the City Council may discuss confidential matters. Because the City Attorney's client is the City — with the City Council having ultimate authority to act on the City's behalf — it follows that the City Council holds the privilege. As the holder of the privilege, the City Council may decide to waive the privilege and disclose the City Attorney's communications to the general public. However, the City Manager would not be entitled to do so unless carrying out a Council directive.

On major policy issues subject to Council approval, both the City Manager and City Attorney take direction from a majority of Council members. Contrary direction from staff, an individual council member, or less than a majority cannot be followed. That said, with councils often being split on major policy issues, the City Attorney, like the City Manager, must take special care to provide the same, balanced advice to "all sides" without going through an intermediary.

There are occasions when City business is subject to the authority and oversight of the City Manager therefore, just as the City Attorney must provide balanced advice to the Council, he or she must also have direct relationship with the executive head of the City. Part of this relationship may involve helping define where proper authority resides between the City Council and the City Manager and staff. In all cases, it is best practice for the City Attorney to provide advice "up the chain" to the ultimate decision-maker with respect to each matter. For that reason, whether the City Attorney reports to the Council or to the City Manager, he or she must maintain an excellent professional relationship with both. Some cities address this on their organizational chart by showing a straight line from the Council to the City Attorney, and a dotted line from the City Manager to the City Attorney.

Here are some additional advantages and disadvantages of having the City Attorney report to the Council

Table 9 Advantages and Disadvantages of having the City Attorney report to the City Council

Reporting Relationship of the City Attorney	
Advantages	Disadvantages
Ultimately, the City Council, representing the City, is the client. Therefore, it makes sense for the City Attorney to report to those who speak for the client	With two-year terms for the City Council and the possibility of a wholesale turnover, it is better to have the City Attorney report to the City Manager who likely would have a longer tenure than Council members.

Reporting Relationship of the City Attorney

Some cities set up a mechanism allowing staff to inquire with the City Attorney in the event of a problem like discrimination or harassment from a City Manager or staff.

City Managers who have had experience in other cities or who have been with Amarillo for a long time, might be the better option for supervising the City Attorney because they would have greater knowledge about City operations

Usually, the relationship between the City Attorney and the Council is established by a fixed term contract approved by the Council. The fixed term contract should overlap election dates to give the City Attorney some job security

A City Attorney who reports to the City Manager may have more job security, especially given a council with two-year terms

**Shauna Clark | Public Sector Advisory
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