

July 19, 2019

**SJVIA Board Meeting: Consultant’s Report on Wellness Allocation Access Guidelines**

The SJVIA has an annual wellness budget of approximately \$392,000. The wellness funds come from three sources 1) Kaiser \$50,000, 2) Anthem \$50,000, and 3) the \$2.50 PEPM built into the premium rates for \$292,000.

At the last Board meeting, the SJVIA board approved allocation of the dollars to each entity for their wellness needs.

**2019 Wellness Budget Allocation**

SJVIA	Wellness Dollar Allocation				Total
	County of Fresno	County of Tulare	City of Marysville		
Anthem \$50,000	\$ 29,918	\$ 19,680	\$ 402	\$ 50,000	
Kaiser \$50,000	\$ 46,496	\$ 3,196	\$ 308	\$ 50,000	
\$2.50 PEPM Allocation	\$ 195,240	\$ 95,280	\$ 1,500	\$ 292,020	
<b>Total Wellness Allocation</b>	<b>\$ 271,654</b>	<b>\$ 118,156</b>	<b>\$ 2,210</b>	<b>\$ 392,020</b>	

The SJVIA will continue to support the SJVIA members in their wellness campaigns and programs by offering the funding available.

For an SJVIA member to access wellness funds, the following guidelines need to be adhered to.

1. A request for funds or items must be made by the member entity. The request should include:
  - a. Request for funds or purchase of items
  - b. Brief purpose for which the funds or purchase will be used
  - c. Documentation supporting the dollar amount requested (i.e., quote from vendor, description of prizes/gift cards, etc.) and whether the entity wants a check from the SJVIA, a carrier, or the SJVIA via the SJVIA Consultant to administer the request, make the purchase and arrange for payment and delivery to the member party
  - d. What funds are utilized for the request (e.g. funds held by Anthem, funds held by Kaiser, and/or funds held by the SJVIA). Kaiser funds may require Kaiser approval for their specific purpose.
  - e. Date by which funds or purchase is to be provided, and where and to whom delivery is to be made.
2. Upon receiving the request, SJVIA management will either approve/deny the request.

3. The SJVIA Consultant will administer the request including the management and timing of deliverables. Please note that short turnaround times requested by SJVIA member entities, may not be able to be completed by the time requested. It is recommended that the request for wellness funds or wellness items be given a minimum of 4-6 weeks to turnaround.
4. Funds not used in the current calendar year, will rollover to the following year. Carrier funds will not rollover. SJVIA member entities should make sure to utilize carrier dollars in the calendar year allocated.
5. Allocation of funds available will be determined and reported by the first SJVIA Board meeting of each calendar year.