



HVBA
HEALTH & VOLUNTARY BENEFITS ASSOCIATION®

HVBI
HEALTH & VOLUNTARY BENEFITS INSTITUTE®

2024 CORPORATE MEMBERSHIPS & GROUP PURCHASING PROGRAM

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The HVBA has several marketing options for sponsors to engage within. The HVBA's "Daily Industry Report", Roadshow / Event Sponsorship, HVBI's Group Purchasing Organization, and annual corporate memberships. We provide innovative solutions for the Healthcare & Voluntary verticals aligning with the following stakeholders:

- Healthcare Professionals
- Employee Benefits Brokers & Agencies
- High Profile Influencers such as Third-Party Administrators (**TPA's**)
- Industry Consultants & Independent Marketing Organization's (**IMOs**)
- Enrollment & Communication Firms
- Insure-Tech Companies
- Insurers/Carriers
- Human Resource (**HR**) Executives

The "Daily Industry Report," a service provided by the Health & Voluntary Benefits Association® (HVBA), has refined marketing campaigns for the employee benefits industry to the most cost-effective / easily administrated program available today.

We have grown a list of many key people engaged in distributing and administering health, voluntary, and employee benefits. We have a straightforward, cost-effective platform for creating engagement within the entire ecosystem of professionals involved in the distribution of employee benefits.

Our database has been carefully constructed to include the top employee benefits brokers and agencies and high-profile influencers within the employee benefits vertical. With over 14k daily subscribers and a 30% click through rate with 2024 projections of over 8 million deliveries of our Daily Industry Report. Additionally, we have over 79k LinkedIn followers on our HVBA and Self-Funded Healthcare pages. Assuming some duplication, we are confident in touching over 23k unique followers. As a corporate sponsor you are entitled to participate in the HVBA's Group Purchasing Organization ("GPO").

Our industry reach is vast and continues to grow by double digits each year. Currently we have the following reach:

- Total Reach: 216,896
 - HVBA Board Members (115,278)
 - LinkedIn Groups (79,303)
 - Daily Industry Report (14,663)
 - Other Social Media (7,652)
- Our aggregate connections are not all unique and we estimate a 15% overlap yielding a net unique reach of 184,362

GPO, Custom Product/Program Development and Consulting:

First, we established connections not just in the voluntary benefits vertical, but healthcare as well. In 2024, we rebranded the VBA to HVBA, illustrating our breath in a much larger insurance industry. Thus, VBA is now The Health & Voluntary Benefits Association. Additionally, to segregate our GPO, yet run in parallel with the overall organization, we further created The Health & Voluntary Benefits Institute.

Next, we developed a review and approval set of criteria for the contracts we onboard as well as categories of contracts we want to have, such as: ACA Qualified health Plans for 1099, part-time employees, GIG workforce, MERP's and ICHRA's), Third-party Administrators such as: BenAdmin, TPA, Networks, Stop Loss, PBMs and pharmacy adjacent (rebate aggregators and pharmacy cost and risk containment), Ancillary and Voluntary Carriers, Ancillary and Voluntary point solutions, platforms, technology, and more...

Custom-branded programs we have developed:

- Non-PBM Pharmacy/Primary Care (**membership-based, pre-insurance access**)
- CI/HI embedded Genomics
- ACA Qualified MVP Health plans
- Custom CI, HI and Accident programs
- Administrative protocols
- Claims Processing and Instant Payments

From a consulting point of view, we needed to develop a message around our ability to design any solution, product or program in our industry, whether it is for an employer group, 1099 workforce, carrier, association, union/trust or any other affinity-like group. We desire to have carriers, human resource executives, plan sponsors and brokers to come to us for assistance in solving their problems through developing programs, products and strategies that they can use directly or take to the marketplace. This includes pulling solutions together for unique bundles that are fully integrated.

We finished by establishing a series of GPO participation guidelines, which HVBA members, both individual and corporate, can leverage increasing their firm's revenue coupled with custom and exclusive arrangements.

The HVBI GPO can be leveraged by HVBA members and sponsors saving them hours upon hours of negotiation and development time. The due diligence is completed for them as well as custom plan designs, enhanced compensation models and other strategic and unique programs, products and platforms.

A GPO contract provider application must be completed detailing the contract provider's business and its objectives. Since financial, criminal, and other background checks may be required as determined by the HVBA, a GPO non-refundable application fee of \$500 is due at the time of application processing.

Once the GPO application is approved, the GPO contract provider must be a corporate member of the HVBA at the minimum Bronze level. There are four options of corporate membership, and the \$500 application processing fee will be applied to any corporate membership selected.

The GPO contract provider understands they may or may not be the sole entity within a specific GPO industry category.

The GPO arrangement must be for no less than a 3-year agreement, with termination clauses defined within the final HVBA / GPO contract.

The GPO contract provider agrees to offer the HVBA and their contacts and members an arrangement that includes lowest net pricing, preferential compensation and/or other concessions, or program/product features, ensuring the HVBA and GPO arrangement to be a best-in-class program.

The GPO contract provider agrees to fairly negotiate a final agreement with the HVBA.

The GPO contract provider arrangement will be a separate document from any other HVBA agreement in place relative to other utilized HBVA services, such as advertising in the HVBA DIR.



Corporate Platinum Membership Program

- Platinum Corporate member (\$20,000 - Limited to 5)
 - Sponsorship Logo at all 2024 events, attendee guides & HVBA Website
 - 2 Roadshow Speaking Engagements (HVBA's choice)
 - Co-MC at 1 HVBA Roadshow (HVBA's choice)
 - Speaker presentation to HVBA board members at Annual Event (Nov 2024)
 - 4 DIR Advertisements (Includes LinkedIn postings & Questions of the week)
 - Access to research library and all analytical reports distributed by the HVBA
 - 4 Registered HVBA individual memberships
 - Eligible to Contract with HVBI's GPO Platform
 - Eligible to Access HVBI's GPO Platform
 - Up to 5 VIP guests at all 2024 events (additional guests at HVBA's discretion)
 - Up to 4 CVBS Certifications
 - Press release announcing the membership
 - Logo appears on all whitepapers and reports
 - 20% discount on all other HVBA services
 - **Payment Options**
 - \$20,000 in one annual payment with a 3-year membership rate guarantee
 - \$6,000 initial payment then \$1,400 for 11 months (\$21,400)
 - If a multi-year sponsorship is signed, a 10% discount on year 2 and a 15% discount for year 3 will be offered

Corporate Gold Membership Program

- Gold Corporate Member (\$15,000 - Limited to 10)
 - Sponsorship Logo at all 2024 events, attendee guides & HVBA Website
 - 1 Roadshow Speaking Engagement (HVBA's choice)
 - Co-MC at 1 HVBA Roadshow (HVBA's choice)
 - 3 DIR Advertisements (Includes LinkedIn postings & Questions of the week)
 - Access to research library and all analytical reports distributed by the HVBA
 - 3 Registered HVBA individual memberships
 - Eligible to Contract with HVBI's GPO Platform
 - Eligible to Access HVBI's GPO Platform
 - Up to 4 VIP guests at all 2024 events (additional guests at HVBA's discretion)
 - Up to 3 CVBS Certifications
 - Press release announcing the membership
 - Logo appears on all whitepapers and reports
 - 15% discount on all other HVBA services
 - **Payment Options**
 - \$15,000 in one annual payment with a 2-year membership rate guarantee
 - \$5,050 initial payment then \$1,000 for 11 months (\$16,050)
 - If a multi-year sponsorship is signed, a 10% discount on year 2 and a 15% discount for year 3 will be offered

Corporate Silver Membership Program

- Silver Corporate Member (\$10,000 - Limited to 15)
 - Sponsorship Logo at all 2024 events, attendee guides & HVBA Website
 - 2 DIR Advertisements (Includes LinkedIn postings & Questions of the week)
 - Access to research library and all analytical reports distributed by the HVBA
 - 2 Registered HVBA individual memberships
 - Eligible to Contract with HVBI's GPO Platform
 - Eligible to Access HVBI's GPO Platform
 - Up to 3 VIP guests at all 2024 events (additional guests at HVBA's discretion)
 - Up to 2 CVBS Certifications
 - Press release announcing the membership
 - Logo appears on all whitepapers and reports
 - 10% discount on all other HVBA services
 - **Payment Options**
 - \$10,000 in one annual payment with a 2-year membership rate guarantee
 - \$3,000 initial payment then \$700 for 11 months (\$10,700)
 - If a multi-year sponsorship is signed, a 5% discount on year 2 and a 10% discount for year 3 will be offered

Corporate Bronze Membership Program

- Bronze Corporate Member (\$5,000)
 - Sponsorship Logo at all 2024 events, attendee guides & HVBA Website
 - 1 DIR Advertisement (Includes LinkedIn postings & Questions of the week)
 - Access to research library and all analytical reports distributed by the HVBA
 - 1 Registered HVBA individual membership
 - Eligible to Contract with HVBI's GPO Platform
 - Eligible to Access HVBI's GPO Platform
 - Up to 3 VIP guests at all 2024 events (additional guests at HVBA's discretion)
 - Up to 1 CVBS Certification
 - Press release announcing the membership
 - Logo appears on all whitepapers and reports
 - 5% discount on all other HVBA services
 - **Payment terms**
 - \$5,000 1x payment with a 1-year membership rate guarantee
 - If a multi-year sponsorship is signed, a 5% discount on year 2 and a 10% discount for year 3 will be offered

Term and Termination

This LOU will become effective on the date signed below, and both parties shall have certain rights, to terminate the Agreement. Upon termination, all rights shall immediately return to the originator, without prejudice, the monies that may be due or become due upon the occurrence of any of the following:

- A.** Any violation of the terms of the membership by the company or the company's inability to perform in accordance with this Agreement, membership monies shall remain due or forfeited if already paid;
- B.** Any violation of the terms of the Agreement by the HVBA, at the members option, unaccrued membership monies shall be refunded within 30 days; with no additional monetary damages; and/or
- C.** If the HVBA cancels the company's GPO agreement for cause, membership monies shall remain due or forfeited if already paid, since the GPO is a small part of the HVBA's corporate membership program.

Company's Responsibilities

The Company shall receive a list of all attendees for post-event communications. The company shall not distribute nor sell, nor provide any other 3rd party access to the event's attendee list. The company shall limit communications to no more than three (3) methods of correspondence to said attendees. The HVBA may request a return of all attendee data and information at any time, if it deems necessary.

Force Majeure

Neither party shall be considered in default or in breach of the Agreement when such failure or delay to perform should be triggered by any act or force of nature beyond either party's control. Such acts or force of nature would include, but are not limited to, acts of God (tornado, hurricane, lightning strike, etc.), fire, flood, hostilities, war, striking, or governmental restrictions. Should such performance become interrupted by any such act as mentioned above, every reasonable effort shall be made to resume full performance as promptly as possible.

Notice

Both parties agree that any notices provided in connection with the Agreement, shall be made in writing, by registered or certified mail, with return receipt requested.

Prevailing Law

The Agreement shall be governed in accordance with the prevailing laws of the State of New Jersey. Every aspect and provision of the Formal Agreement shall be construed in such a manner that shall render this an effective and valid legal instrument under current applicable law. Should any part of the Formal Agreement be deemed ineffective or unenforceable under applicable, only that specific provision shall be invalid and unenforceable, without affecting or invalidating any of the remaining provisions contained within the Formal Agreement.

Legal Remedies

Should either party seek legal remedy to enforce or interpret any of the provisions contained in the Agreement, the prevailing party shall be entitled to reasonable attorney fees, in conjunction with any other relief deemed appropriate by the court to which the party may be entitled, except as outlined in the Term and Termination of the Agreement.

Membership Pricing

Both parties acknowledge that the terms set forth in this LOU and Agreement accurately reflect the terms being agreed to by the parties and that such terms appear within this Agreement.

Both parties acknowledge that the terms set forth in this corporate membership program LOI accurately reflects the terms being agreed to by the parties relative to membership level and financial commitment.

By signing my name below, and checking the applicable box below, I am duly authorized by my company to enroll in a corporate membership program with the HBVA:

- | | | |
|--------------------------|----------------------------|-----------------|
| <input type="checkbox"/> | Platinum Membership | \$20,000 |
| <input type="checkbox"/> | Gold Membership | \$15,000 |
| <input type="checkbox"/> | Silver Membership | \$10,000 |
| <input type="checkbox"/> | Bronze Membership | \$5,000 |

Sincerely,



Robert S. Shestack, CVBS, CFF
 Publisher, Chairman & CEO
 Voluntary Benefits Association, Inc.

 Date

 Sponsor: _____
 Name: _____
 Title: _____

 Date

HVBA General Sponsorships

- Daily Industry Report Campaign: **\$1,250 per month**
- Daily Industry Report Boost Campaign: **\$1,950 per month**
- White Papers: **\$3,500 to \$7,500**
- Webinars: **\$4,500 to \$7,500**
- Benchmarking & Analytics: **\$17,500 per product**
- We Got You Covered Guest Appearance: **\$2,500**
- Press Releases: **\$1,500**

HVBA Roadshow Sponsorships

- HVBA Roadshow Give-a-way Sponsor: **\$2,500**
- HVBA Roadshow or Annual Meeting CE Program Sponsor: **\$3,500**
- HVBA Roadshow Food/Drink Sponsor: **\$5,000**
- HVBA Roadshow Event Sponsor: **\$7,500**

HVBA Annual Meeting Sponsorships

- HVBA Annual Meeting Give-a-way Sponsor: **\$2,500**
- HVBA Annual Meeting Board Sponsor: **\$3,500**
- HVBA Annual Meeting Food/Drink Sponsor: **\$5,000**
- HVBA Annual Meeting Event Sponsor: **\$10,000**



Robert S. Shestack, CVBS, CFF
 Publisher, Chairman & CEO
 Voluntary Benefits Association, Inc.

_____ Date

Sponsor: _____
 Name: _____
 Title: _____

_____ Date

GROUP PURCHASING ORGANIZATION & CONTRACT PROVIDER PROGRAM

For Carriers/Suppliers/Vendors/Service Providers

Company Name Applying for GPO Provider Program

Submission Date

GENERAL INFORMATION

Company Name Applying for Participatiion: _____

DBA (trade or fictitious) Name: (if applicable) _____

Parent Company: (if applicable) _____

Address Line 1: _____

Address Line 2: _____

City: _____ State: _____ Zip Code: _____

Telephone: () _____ Mobile: () _____ EIN: _____

Website URL: _____ Email: _____

EIN: _____ Type of Entity (LLC, C-Corp etc.): _____

SIC Code: _____ Situs State of Entity: _____

Years in Business: _____ If publicly traded (ticker symbol): _____

Are you a Not-for-Profit (501(c)(6) or a Non-Profit Entity (501(c)(3): _____

Number of Company EE's: _____ Estimated Number of Clients: _____

Estimated Number of Client Employees: _____

What are the top 3 industries your clients represent: _____

Individual Completing Application: _____

Individual's Title / Position: _____

Applicant Key Contacts

Function/Title	First Name	Last Name	Phone No.	Email
President & CEO	John	Smith	(123) 456-7891	John.smith@abcxyz.com

Business Profile

Main product(s) offered: _____

Main service(s) offered: _____

Major customers: _____

D&B report attached: Yes: _____ No: _____ D&B Number: _____

Have you attached any collateral materials? Yes: _____ No: _____

Have you attached a sample proposal? Yes: _____ No: _____

Do you carry E&O insurance? Yes: ___ No: ___ Annual Limit: \$_____

Type of Business:

- Carrier**
- Broker/Consultant**
- TPA**
- Enrollment Firm**
- Payment & Collections**
- Compliance**
- Technology**
- Other:** _____

What are the core competencies of your organization? _____

Who are your top 3 to 5 competitors and how are you different? _____

How do you protect your client’s data from risk / data breaches? (high-level)

CERTIFICATES & LICENSES DATA

Are you required to have certificates and/or licenses for products and/or services?

Yes: _____ No: _____

Which type of license(s) are you required to have? (check all that apply)

Insurance: _____ TPA: _____ DOI Filings: _____

Please provide copies of all required state/federal licenses (insert the number of licenses).

Insurance: _____ TPA: _____ DOI Filings: _____

If an insurance carrier, what are your ratings and NAIC number: _____ (NAIC)

AM Best: _____ S&P: _____ Moody's: _____ Fitch: _____ DemoTech: _____

Based on the applicable ratings above, has your rating been diminished / reduced over the past three (3) years? If, yes, please explain.

Yes: _____ No: _____

Explanation:

Note:

- **If you are a TPA, please provide a copy of each state's required license**
- **If you are required to file your product with each state's department of insurance, just provide a copy of the license from your home state**
- **If you are required to have an individual or agency producer's license, just provide a copy of your resident home state**

PRICING, COMMISSIONS & OVERRIDES

The HVBI requires all GPO agreements to conform with the following requirements:

1. When fixed pricing is applicable, the HVBI GPO agreement must provide for the lowest pricing offered by the applicant.
2. Broker commissions must be equal to or better than the applicants highest broker compensation offered.
3. The HVBI GPO agreement must provide for an override to the HVBI without affecting pricing or broker compensation.
4. The agreement must be for no less than a three (3) year period with multi-year renewals.
5. A mutual hold-harmless agreement must be executed.
6. The HVBI shall be listed as an additional loss payee in the applicants E&O policy.

Applicant agrees to the above six (6) terms & conditions: Initial Here: _____

BUSINESS POLICIES (attach documents to submitted application)

Do you have a written DE&I HR policy? **Yes:** _____ **No:** _____

Do you have a written disaster recovery policy? **Yes:** _____ **No:** _____

Do you have a written business continuity plan? **Yes:** _____ **No:** _____

Are you SOC 2 compliant? **Yes:** _____ **No:** _____

Are you PCI compliant? **Yes:** _____ **No:** _____

GENERAL BACKGROUND QUESTIONS

If any of the following questions are answered "YES," an explanation must be attached. Please answer to the best of your knowledge.

Has any company officer and/or shareholder ever been convicted of a crime, had a judgment withheld or deferred, or currently charged with committing a crime?

Yes

No

"Crime" includes a misdemeanor, felony or a military offense. You may exclude misdemeanor traffic citations or convictions involving driving under the influence (DUI) or driving while intoxicated (DWI), driving without a license, reckless driving, or driving with a suspended or revoked license and juvenile offenses.

"Convicted" includes, but is not limited to, having been found guilty by verdict of a judge or jury, having entered a plea of guilty or nolo contendere, or having been given probation, a suspended sentence or a fine.

Has any company officer and/or shareholder been named or involved as a party in an administrative proceeding regarding any professional or occupational license or registration?

Yes

No

"Involved" means having a license censured, suspended, revoked, canceled, terminated; or, being assessed a fine, a cease-and-desist order, a prohibition order, a compliance order, placed on probation or surrendering a license to resolve an administrative action.

"Involved" also means being named as a party to an administrative or arbitration proceeding which is related to a professional or occupational license.

"Involved" also means having a license application denied or the act of withdrawing an application to avoid a denial.

You must include any business so named because of actions, in a capacity as an owner, partner, officer, director, or member or manager of a Limited Liability Company.

GENERAL BACKGROUND QUESTIONS

Has any demand been made, or judgment rendered against any company officer and/or shareholder, or any business in which they are or were an owner, partner, officer, or director, or member or manager of a limited liability company, for overdue monies by an insurer, insured or producer or have they ever been subject to a bankruptcy proceeding? Do not include personal bankruptcies, unless they involve funds held on behalf of others

Yes

No

Has any company officer and/or shareholder ever been notified by any jurisdiction to which they were applying of any delinquent tax obligation that is not the subject of a repayment agreement? If you answer yes, identify the jurisdiction(s): _____

Yes

No

Has any company officer and/or shareholder currently a party to, or have they ever been found liable in any lawsuit, arbitration, or mediation proceeding involving allegations of fraud, misappropriation or conversion of funds, misrepresentation, or breach of fiduciary duty?

Yes

No

Has your company ever filed an E&O or D&O claim?

Yes

No

If yes, please provide details: _____

Has your business ever had a security and/or data breach?

Yes

No

If yes, please provide details: _____

Note: If applicable documentation is required to support any of your responses, please attached them at the end of this application and initial here: _____

APPLICATION CERTIFICATION ATTESTATION

I, _____, certify to the best of my knowledge the entirety of the information provided and questions answered are true and accurate.

Furthermore, I agree to: (1) Fairly negotiate the final terms and conditions relative to a final HVBI GPO agreement, (2) Permit HVBI to pull a credit reports, (3) Permit HVBI to search for criminal and non-criminal background checks and (4) Permit HVBI to run other reports, including but not limited to: Better Business Bureau, Dunn & Bradstreet etc.

Signature & Title (Authorized Company Officer)

Date

Signature & Title (Witness & Attestation)

Date

Products You Offer

(please include all products or services that apply)

- Products / Services: (please specify) _____
- Products / Services: (please specify) _____
- Products / Services: (please specify) _____
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- Products / Services: (please specify) _____
- Products / Services: (please specify) _____
- Products / Services: (please specify) _____
- Products / Services: (please specify) _____

REFERENCES

Kindly provide customer / broker references. If more than five (5) references, please attach a separate sheet. Multiple references cannot be from the same organization.

Reference #1

Business Name	
Contact Name	
Phone No.	
Email	

Reference #2

Business Name	
Contact Name	
Phone No.	
Email	

Reference #3

Business Name	
Contact Name	
Phone No.	
Email	

Reference #4

Business Name	
Contact Name	
Phone No.	
Email	

HEALTH & VOLUNTARY BENEFITS INSTITUTE® (HVBI)

Contact Details:

Robert S. Shestack, Chairman & CEO, rshestack@vbassociation.com

Jake C. Velie, Vice Chairman, President, jvelie@vbassociation.com

General GPO Accreditation Inquiries:

Website: www.vbassociation.com

Phone Number (856) 200-8024

PRIVACY POLICY

By providing your contact information through this application form, you agree to be contacted by a member of our Executive team. You also agree to receive email communications from VBA about products/services relevant to your application. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practice and commitment to protecting your privacy, check out our [Privacy Policy](#).

CONFLICT OF INTEREST DISCLOSURE POLICY

The Chairman & CEO of the HVBI, to the best of his/her knowledge, when assigning the HVBI review panel of three (3) members, shall avoid any conflicts of interest between the applicant and the review committee. Each assigned review committee member shall also certify they do not have a conflict of interest in review of this application.

TO BE FILLED OUT BY HVBI GPO PERSONNEL ONLY

Evaluated by: _____ Date: _____

Notes/Comments: _____

Approved by: _____ Date: _____
(Name and Title)

Attestation by: _____ Date: _____
(Name and Title)

GPO Approved: _____ Further Info Required: _____ GPO Denied: _____

