

COUNTY OF MILWAUKEE
Inter-Office Communication

Date: 6/16/2026

To: Marcelia Nicholson-Bovell, Chairwoman, Milwaukee County Board of Supervisors

From: Jeremy Lucas, Acting Deputy Chief of Staff, Office of the County Executive, David Crowley

Subject: United Healthcare Contract – Requested Timeline

File Type: Informational Report

REQUEST

From the Office of the County Executive, providing a requested timeline of the United Healthcare Contract

BACKGROUND

File #26-279 requested a dated timeline of the events surrounding the United Healthcare Contract which was approved in File #26-272

Staff reviewed emails from January 1, 2025 through February 5, 2026 that were sent or received by the Total Rewards Director with the keywords:

- United Healthcare
- UHC
- Contract
- Audit
- RFP
- Request for Proposal
- All emails from the domain wtwco.com

The search resulted in 2,848 received emails and 572 sent emails. Attachment 1 – ‘UHC Administrative Services Agreement Timeline’ outlines the requested timeline.

Conclusions

After reviewing the emails there were some observations that help provide clarity on conversations concerning this topic at public meetings:

- All communications and negotiations surrounding the contract appeared to be in the best interest of the county

- Total Rewards Division depended heavily on contract staff from third-party vendors and lacked a mechanism for contract version control and documentation.
- County contracting process does provide for third-party purchasing support or delegation, however documentation was lacking.

File #26-440 outlines changes made to reinforce expectations around contracts, strengthen operational policies and address any personnel skill gaps.

Departments own responsibility for coordination with other stakeholders on contract approval (per AMOP 15.01v3). Both the recently revised AMOP and previous versions clearly defined the roles and responsibilities of the requesting department to include:

1. Managing their own contracts and contract compliance
2. Collaborating with departments that will use the contractual services or be asked to sign off on the contract in whole or in part
3. Asking for help when needed
4. Remaining current with all procurement and contracting training

Department staff and leadership are expected to identify deadlines for expiring contracts, delineate appropriate procurement actions and coordinate interdepartmental activities to ensure contract and/or service continuity. This did not occur for the United Healthcare Administrative Services Agreement.

ALIGNMENT TO STRATEGIC PLAN

2B: Break down silos across county government to maximize access and quality of services offered.

3B: Enhance the County's fiscal health and sustainability

FISCAL EFFECT

The report is informational only and there is no fiscal impact.

ATTACHMENTS:

UHC Administrative Services Agreement Timeline

VIRTUAL MEETING INVITES

Jeremy Lucas Jeremy.Lucas@milwaukeecountywi.gov

Aaron Hertzberg Aaron.Hertzberg@milwaukeecountywi.gov

Bill Davidson William.Davidson@milwaukeecountywi.gov

Isaac Rowlett Isaac.Rowlett@milwaukeecountywi.gov

Amy Turim Amy.Turim@milwaukeecountywi.gov

PREPARED BY:

Jeremy Lucas, Acting Deputy Chief of Staff, Office of County Executive David Crowley

cc: Kelly Bablitch, Chief of Staff, Milwaukee County Board of Supervisors
Janelle M. Jensen, Legislative Services Division Manager, Office of the County Clerk

UHC Medical Administrative Services Timeline

5/27/25 – Elisabeth Wright (Willis Towers Watson) emailed Director Maze with the results of the RFP for medical administrative services informing him that UHC provided the winning proposal

6/10/25 – Director Maze responded to WTW via email to proceed with UHC as the winning vendor

6/12/25 – Elisabeth Wright (WTW) emailed Director Maze an new insurance certificate and the UHC renewal exhibit.

6/17/25 – Elisabeth Wright (WTW) emailed Director Maze the UHC Administrative Services Agreement contract renewal requesting review for accuracy.

6/17/25 – Director Maze replied to WTW requesting new audit language, invoicing and contact information from UHC for contract signatures

6/17/25 – Elisabeth Wright (WTW) replied to Director Maze reminding him that the provided renewal is an amendment to the original 2009 Administrative Services Agreement (ASA). Clarification was requested on if current amendment should continue or if requested language should be added to the amendment.

6/18/25 – Director Maze responded to WTW that it may not need to be revised because it is an amendment. Director Maze reiterated that the signer information was still needed.

6/19/25 – Elisabeth Wright (WTW) responded to Director Maze with the UHC contract signatory

7/8/25 – Elisabeth Wright (WTW) provided Director Maze with the UHC Certificate of Insurance

9/16/25 – Elisabeth Wright (WTW) emailed Director Maze with objections from UHC on the audit language

9/17/25 – Director Maze forwarded the objections of UHC to the audit language to Director Folliard (Audit Services), OCC and the Office of the Comptroller requesting guidance on how to address the concerns.

9/18/25 – Paul Grant (Audit) replied to Director Maze requesting the full draft contract in order to provide guidance.

9/23/25 – Paul Grant (Audit) emailed Director Maze following up on his request for the full draft contract.

9/23/25 – Director Maze responded to Paul Grant (Audit) stating that he is requesting the latest version from WTW. Audit acknowledged receipt.

9/23/25 – Director Maze requested the latest version of the contract from Elisabeth Wright (WTW)

9/23/25 – Elisabeth Wright (WTW) responded to Director Maze noting that UHC will not agree to the standard audit language and requested review by Milwaukee County OCC for

approval.

9/24/25 – Director Maze emailed Paul Grant (Audit) requesting Audit review the proposed language by UHC.

9/24/25– Paul Grant (Audit) reiterated via email to Director Maze that the language from the email could not be reviewed without the context of the contract.

10/2/25 – Director Maze requested the latest version of the contract from Elisabeth Wright (WTW) without the audit language.

10/8/25 – Elisabeth Wright (WTW) emailed Director Maze that UHC escalated the request and expects to have a version soon.

10/8/25 – Director Maze acknowledged the receipt of the update from WTW

10/28/25 – Elisabeth Wright (WTW) emailed Director Maze a proposal from UHC to:

- restate the current Administrative Services Agreement (ASA) using the current agreement as the base
- No negotiations will be made to the ASA
- The ASA must be finalized by the next renewal and in the first year of a new multi-year term
- If county does not agree, restatement is discontinued and operation under the current ASA

10/28/25 – Director Maze replied to Elisabeth Wright (WTW) and stated he would manage her proposal next week and that the contract needs to be complete by 11/10/25. Director Maze stated he is working with the Office of the Comptroller on other items. Elisabeth Wright (WTW) acknowledged receipt.

11/3/25 – Director Maze emailed WTW requesting UHC insurance information and contact information of the signer from UHC

11/3/25 – Elisabeth Wright (WTW) replied with the insurance information and signer information.

1/15/26 – Director Maze received an email from Elisabeth Wright (WTW) with the UHC ASA amendment and UHC insurance certificate.

1/15/26 – Director Maze emailed Director Folliard (Audit) and Paul Grant (Audit) attachments of the 2020 United Health Care Services amendment and the 2023-2025 UHC Optum Renewal Terms amendment

1/15/26 – Director Maze emailed Deputy Comptroller Moon attachments of the 2026 ASA fees, UHC Certificate of Insurance, a draft board report for January 2026, a draft resolution for January 2026, a TBE-12 recommendation form, a 1684 form for the contract and a fiscal note for the January 2026 board report.

1/16/26 – Paul Grant (Audit) emailed Director Maze thanking him for the amendments and reiterated his request for the original contract. Mr. Grant referred back to this September 18, 2025 email requesting this information.

1/16/26- Elisabeth Wright (WTW) emailed Director Maze an attachment of the executed 2009 ASA with United Healthcare.

1/16/26 – Elisabeth Wright (WTW) emailed Director Maze attachments of additional amendments between Milwaukee County and United Healthcare from 2010, 2011, 2020, 2021-22 and 2023

1/16/26 – Director Maze replied to Paul Grant (Audit) with an attachment of the executed 2009 Administrative Services Agreement (ASA) with United Healthcare.

1/16/26 – Director Maze forwarded the 1/16/26 email to Paul Grant (Audit) to Deputy Comptroller Moon.

1/16/26 – Deputy Comptroller Moon replied to Director Maze requesting notification when the audit language is approved and direct email to him with documentation to expedite the process.

1/20/26 – Director Maze emailed Paul Grant (Audit) for an update on the contract language approval stating that he is planning to request approval for a late submission from the board chair to Finance Committee.

1/20/26 – Paul Grant (Audit) replied to Director Maze that the contracts and amendments were reviewed and that Audit has reached out to OCC to discuss concerns regarding County's right to audit contractor performance.

1/21/26 – Elisabeth Wright (WTW) emailed Director Maze, citing a verbal conversation earlier that day, the existing audit language in the contract.

1/21/26 – Director Maze emailed Paul Grant (Audit), Molly-Pahl Skierawski (Audit), Director Folliard and OCC the existing language in the UHC contract citing an upcoming meeting with OCC on 1/22/26. Director Maze stated that UHC's position is not to permit substitutions to their Statement of Work when similar language already exists in their standard agreements.

1/22/26 – Director Maze emailed Paul Grant (Audit), OCC, Alexis Gassenhuber (Comptroller), Molly Pahl-Skwierawski (Audit) and Director Folliard requesting an update on the meeting with OCC.

1/22/26 – Director Maze forwarded his inquiry to Audit to Chief Human Resources Officer Franklin without comment.

1/23/26 – Paul Grant (Audit) replied to Director Maze that the two offices were still working through the matter and requested copies of policies and procedures for UHC monitoring and oversight, including any documentation substantiating efforts in this regard.

1/23/26 – Director Maze forwarded Paul Grant's (Audit) response to Chief Human Resources Officer Franklin without comment

1/23/26 OCC emailed Director Maze with advice regarding the UHC contract and requested time to meet.

1/26/26 – Director Maze replied to OCC that he is amenable to a conversation, would make

himself readily available and thanked OCC for their support.

1/27/26 – Director Maze accepted a meeting invitation for 1/27/26 with OCC

1/27/26 – OCC emailed Director Maze offering to cancel their meeting for 1/27/26 citing a conversation on 1/26/26 that provided the necessary information.

1/27/26 – Director Maze replied to OCC confirming cancellation.

1/27/26 –OCC emailed Director Maze requesting certain documents.

1/27/26 – Director Maze replied to OCC with the requested documents.

1/27/26 – Jennifer Mueller (HR) emailed a copy of File 26-272 which was scheduled to appear before the board in January 2026 to members of CEX Office, OCC, Supervisor Johnson, Supervisor Logsdon, Comptroller Sumner, Director Cady, Director Hertzberg, Director Maze, HR Benefits and Office of the County Clerk.

1/27/26 – Cynthia Pahl (Comptroller) emailed Director Maze, copying Chief Human Resources Officer Franklin, Comptroller Sumner and Deputy Comptroller Moon, requesting clarification on the fiscal note provided for board File #26-272. Cynthia Pahl also requested backup data used to determine the subsequent year cost of \$90m.

1/27/26 – Director Maze responded to Cynthia Pahl (Comptroller) and all cc's from previous email, that he would provide it once it is put together

1/27/26 – Director Maze emailed Cynthia Pahl (Comptroller), Chief Human Resources Officer Franklin, Comptroller Sumner and Deputy Comptroller Moon an attachment 'WTW Healthcare Forecast 2026' and an email from WTW entitled 'WTW Updated 2025 Projections'. The email included justifications for how much health care spend was projected to increase and why.

1/28/26 –OCC emailed Director Maze and Chief Human Resources Officer Franklin with questions regarding File #26-272.

1/28/26 – Chief Human Resources Officer Franklin replied to OCC and Director Maze requesting guidance and asked if it would be easier to discuss via telephone.

1/28/26 – Director Maze emailed OCC, copying Chief Human Resources Officer Franklin, thanking him for discussing the issue verbally and for the advice given. Director Maze requested review of proposed changes to the resolution in File 26-272

1/28/26 –OCC replied to Director Maze and Chief Human Resources Officer Franklin regarding the proposed changes.

1/28/26 – Cynthia Pahl (Comptroller) replied to Director Maze and Chief Officer Franklin that the provided information did not clarify her questions and that she is adding the budget office into the conversation by including Dan Laurila (PSB) and acting Director Rowlett.

1/28/26 – Director Maze forwarded Cynthia Pahl's (Comptroller) email to Elisabeth Wright (WTW) without comment.

1/28/26 – Elisabeth Wright (WTW) replied to Director Maze email with some clarifying points regarding Cynthia Pahl’s (Comptroller) 1/28/26 email surrounding eligibility and participants.

1/28/26 – Comptroller Sumner emailed Director Maze, copying Chief Human Resources Officer Franklin and Deputy Comptroller Moon, that her office and OCC have had discussions surrounding this contract. Comptroller Sumner expressed concern with the process of the amendment as well as with the expiration of the contract. Comptroller Sumner raised many concerns including the method of procurement, multiple amendments, lack of updated contract language, requested information on when the last RFP occurred, why it was allowed to lapse and who negotiated the terms of the agreement. Comptroller Sumner continued the email stating that as a required signatory, she would not sign the contract until the concerns outlined above are satisfied. Comptroller Sumner completed the email by stating that she would share her concerns at the 1/29/26 Finance Committee meeting.

1/28/26 – Chief Human Resources Officer Franklin forwarded Comptroller Sumner’s email to Director Lucas (CEX) without comment

1/28/26 – Chief Human Resources Officer Franklin emailed Director Maze OCC requesting legal guidance relating to the report for 26-272.

1/29/26 – January 2026 Committee on Finance

1/29/26 – Chief Human Resources Officer Franklin forwarded an email from County Board Chief of Staff to Director Maze outlining procedural clarification for a joint Finance and Personnel Committee meeting and notifying Director Maze that documentation should be submitted by 9am 1/30/26

1/29/26 – Elisabeth Wright (WTW) emailed Director Maze information regarding renegotiating the UHC contract to shorter timeframe. Elisabeth Wright stated that a shorter timeframe would require an entirely new negotiation of terms.

1/29/26 – Director Maze replied to Elisabeth Wright (WTW) that he understood.

1/29/26 – Elisabeth Wright (WTW) emailed Director Maze an overview of the WTW RFP process.

1/29/26 – Director Maze emailed Chief Human Resources Officer Franklin and Director Baez (HR Operations/Talent Acquisition) outlining the RFP process undertaken for the UHC contract.

1/29/26 – Director Maze emailed Chief Human Resources Officer Franklin and Director Baez (HR Operations/Talent Acquisition) the timeline presented from HR in File# 26-272 titled “UHC Report Timeline”.

1/29/26 – Director Maze emailed Chief Human Resources Officer Franklin Elisabeth Wright’s (WTW) 1/29/26 email outlining the WTW RFP process.

1/30/26 – Director Maze emailed Chief Human Resources Officer Franklin the RFP Results

presented in File #26-272 titled “RFP Results”

1/30/26 – Director Maze received an email from Elisabeth Wright (WTW) that she was available to attend 2/3/26 board meeting but required details on time and an invitation.

1/30/26 – Director Maze emailed Chief Human Resources Officer Franklin the 1/15/26 email from Elisabeth Wright (WTW) with the UHC ASA amendment and UHC insurance certificate.

1/30/26 – Director Maze forwarded Chief Human Resources Officer Franklin his 9/23/25 email to Elisabeth Wright requesting the latest version of the UHC contract without comment.

1/30/26 – Director Maze forwarded Chief Human Resources Officer Franklin his 10/8/25 email correspondence with Elisabeth Wright (WTW) regarding the escalation of the contract language

1/30/26 – Director Maze forwarded Chief Human Resources Officer Franklin his 10/2/25 email to Elisabeth Wright requesting a contract version without audit language.

1/30/26 – Director Maze emailed OCC certain documents.

1/30/26 – Director Maze forwarded Chief Human Resources Officer Franklin his 1/16/26 email from Elisabeth Wright (WTW) that included attachments of additional amendments between Milwaukee County and United Healthcare from 2010, 2011, 2020, 2021-22 and 2023

1/30/26 – Director Maze was cc’d on an email from Jennifer Mueller (HR) to Supervisor Johnson with additional documentation for the 2/3/26 joint finance and personnel committee meeting. Chief Human Resources Officer Franklin and members of the Office of the County Clerk were cc’d.

2/2/26 – Committee on Finance Special Joint Committee Meeting with Personnel

2/5/26 – Milwaukee County Board of Supervisors Meeting. File #26-272 resolution amended via [Amendment 1](#).

2/6/26 – County Executive signed File #26-272

2/6/26-3/6/26 – Administration and Corporation Counsel worked with appropriate counterparts at UHC to finalize contract.

3/6/26 – UHC ASA contract with Milwaukee County executed retroactive to 1/1/26 and while the agreement does grant the County substantive audit rights, it did not include the County’s current standard audit language.