



Request for Quote

for

**RFQ 18-1 Workers' Compensation Claims Administration
Services**

NOTICE TO PROPOSERS:

Baldwin Park Unified School District will receive sealed proposals
until

4:00 p.m. on Friday September 22, 2017

PROPOSALS WILL BE RECEIVED AT THE FOLLOWING ADDRESS:

Baldwin Park Unified School District
3699 Holly Ave. Baldwin Park, CA 91706

RELEASE DATE: August 11, 2017

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NOTICE CALLING FOR QUOTES

RFQ 18-1 Workers' Compensation Claims Administration Services

NOTICE IS HEREBY GIVEN that Baldwin Park Unified School District (hereinafter referred to as "THE DISTRICT"), is seeking proposals from qualified firms to provide TPA services for THE DISTRICT's self-insured workers' compensation program. Interested firms may submit proposals.

No offer of intent should be construed from this legal notice that THE DISTRICT intends to enter into Agreements with any interested companies for Workers' Compensation Third Party Administration Services unless, in the sole opinion of THE DISTRICT, it is in the best interest of THE DISTRICT to do so.

Written proposals shall be submitted to:

Baldwin Park Unified School District
3699 Holly Ave. Baldwin Park, CA 91706
Attention: Attn: Sandra D. Collins

and must be received at THE DISTRICT office **No later than 4:00 p.m. on September 22, 2017.** Proposals received with a date or time stamp after the deadline will not be considered and shall be returned to the proposer. Companies may not withdraw proposals for a period of sixty (60) days after the date set for opening of the proposals. Proposals will be evaluated in a non-public opening.

All requests for information and questions concerning this RFQ must be directed in writing to:

THE DISTRICT CONTACT PERSON:

Sandra D. Collins
Phone: 626-856-4226
Email: sdcollins822@bpusd.net

The District will release its responses to question by **no later than 4:00 p.m. on September 6, 2017.**

THE DISTRICT reserves the right to reject any or all proposals, to waive any irregularity or informality in a proposal or in the proposer's process. Proposer's evaluation and ranking will be based upon a comprehensive review and analysis of the requested information to determination which proposal's best meets the needs of THE DISTRICT. THE DISTRICT will be the sole judge of the suitability of the received Workers' Compensation Third Party Administrator proposals. Selected and ranked proposers shall abide by THE DISTRICT' decision.

Any protest against the award of a contract pursuant to this RFQ must be received within 5 calendar days after the issuance of the Notice of Intent to Award. The District shall not be obligated to consider protests received after the above specified deadline. All protests must be in writing and submitted to Sandra D. Collins, Purchasing Supervisor: emailed to sdcollins822@bpusd.net or mailed to the above address. The District reserves the right to waive any irregularities or informalities in the RFQ procedures.

Schedule of Events

Baldwin Park Unified School District 2017 RFQ Workers' Compensation Claims TPA

Activity	Completion Dates
Issue RFQ	August 11, 2017
Questions (submit in writing) deadline	4 PM / September 1, 2017
THE DISTRICT Response to Questions	4 PM / September 6, 2017
RFQ Proposal Responses Due	4 PM / September 22, 2017
Evaluation of Proposals / Interviews of Companies	September 27, 2017
Notice of Intent to Award	October 6, 2017
Effective Date of Contract	July 1, 2018

Note: THE DISTRICT reserves the right to cancel and/or modify the above dates at any time. Interviews and possible site visits may be held with selected firms that are determined to best meet THE DISTRICT' needs.

GENERAL INSTRUCTIONS SECTION

1. BACKGROUND

THE HISTORY OF BALDWIN PARK UNIFIED SCHOOL DISTRICT

As of September 1882, the first school house was built on the southeast corner of North Maine and Los Angeles Avenues in 1884. It contained two rows of double seats, a central aisle leading to the teacher's desk, and a heating stove at the north end. Mr. Frazier was the first teacher. In April 1888, The Vineland School District was established according to county records. The first Board of Trustees took office on July 1, 1888, and elected Miss Jessie Washburn to teach the district school that fall. The building was sold in 1890 and moved to another site for a private residence. The district built the second school in 1890 and hired two teachers, Miss Ellen Lang and Miss Venna O. Finney. The second school house was relegated to the past in 1912. It later became a private Japanese school and stood as a landmark until it caught fire on September 5, 1936, and burned to the ground.

On January 10, 1910, Baldwin Park, then known as Vineland, joined the Covina Union High School District. All high school students went to Covina until Baldwin Park School District unified in the early 1950s.

In 1912, a larger school was built and it was named Central School. It was completed in 1922.

In 1914, the community of Vineland changed its name to Baldwin Park, and the name of the district was officially changed to Baldwin Park School District.

Another school was started in 1924 and it was completed in 1927. Margaret Heath had been a teacher since 1906, so in 1924 she was appointed principal of the new school and John Hampton Watts was appointed the district's first superintendent. Upon Mrs. Heath's retirement in 1930, the school was named in her honor.

Central School, built in 1912, was sold to the City of Baldwin Park and a new Central School was built in 1952 at a different location.

Heath School, built in 1924, was torn down and a new Heath School was built on the same site in 1954. As the district continued to grow, Kenmore, the third school, was built in 1939. It is in full operation today. During the 1940s, the three schools in the district adequately housed the elementary grade students of Baldwin Park.

After World War II, growth to the area continued throughout the 1950s and 1960s, so new schools were built accordingly. The last new school, Olive, was built in 1968, although quite a few

relocatable classrooms have been added to the elementary schools, the adult school, and the continuation high school.

Today, there are 13 elementary schools, 4 junior high schools, 2 comprehensive high schools, one model continuation high school, an adult school of 5,000, and a Children's Center. The district (k-12) has grown from 14 students in 1884 to 13,000 in 1982.

The District has an annual revenue of approximately \$171.6 million and payroll of approximately \$123.3 million. There are approximately 1,740 benefit-eligible employees, with approximately 129 retirees participating in the District's Retiree Health Benefit Program. Eligibility for benefits is determined by resolution or labor agreement with the representative employee bargaining units. Bargaining units representing the majority of employee classifications within the District consist of: Baldwin Park Educators Association (BPEA), California School Employees Association (CSEA), Adult and Community Education Teachers Association Baldwin Park (ACETABP), and Baldwin Park School Police Officers Association (BPSPOA).

Unrepresented employee classifications include Administration, Department Heads, Contract, and Confidential Employees. For more information regarding the District, please feel free to view our website: www.pbusd.net .

THE DISTRICT' is currently a member of San Gabriel Valley School District's Self-Insurance Authority, a banking Joint Powers Authority (JPA). At present, our administrative model utilizes the combined skills of THE DISTRICT staff in conjunction with the complete services provided by a Third Party Administrator (TPA) to coordinate all aspects of an integrated workers' compensation program. This includes investigating and adjusting claims, arranging medical services and medical referrals, determining compensability of injuries and illnesses, complying with Federally mandated Centers for Medicare Services (CMS) reporting, establishing and maintaining a medical provider network and a transitional duty/return to work program for industrially injured employees and other appropriate ancillary and supporting programs as needed.

As of June 30, 2017, there are approximately 130 open claims consisting of 121 indemnity claims and 9 medical-only claims. Of the 130 open claims, 67 are litigated. All open workers' compensation claims will be handled by the awarded TPA.

2. GENERAL SCOPE

The Baldwin Park Unified School District is seeking proposals from qualified firms to provide an unbundled TPA services for THE DISTRICT's self-insured workers' compensation program. THE DISTRICT's goal is to establish a three (3) year contractual relationship with the successful Proposer(s). It is the intent of THE DISTRICT to enter into an agreement for a period of three (3) years with an option to renew for two additional years for a maximum of five (5) years. Proposers

should also consider the following factors when preparing their pricing model:

1. Dedicated Claims Adjuster(s) with a 1:125 adjuster to claim ratio
2. Adjuster(s) ratio is not to be modified for medical-only claims
3. Medical-Only or Future Medical Adjuster models shall not be considered
4. Adjusters to have authority to allow for pass-through utilization review(UR) protocols
5. Ancillary services will remain unbundled and assigned at the discretion of the District
6. TPA is to establish a customized Medical Provider Network (MPN)
7. Annual Reporting to the Office of Self-Insured Plans (OSIP)
8. Quarterly File Reviews and with the District's Risk Management Office
9. Return District and employee telephone calls or emails within 24 hours, with a 100% service guarantee of 10% reduction of monthly fees per month of service failure
10. Full Access to the TPA's Risk Management Information System (RMIS) for all of the District's claims
11. Comply with Federally mandated Centers for Medicare Services (CMS) reporting
12. Assist in completing and maintaining current injury and illness records mandated by the Occupational Safety and Health Administration (OSHA)

Proposers responding to this Request for Quote must meet the requirements set forth in the following sections. The successful Proposer(s) will provide comprehensive Workers' Compensation Third Party Administrator Services throughout the term of the contract. These services will be provided under the direction of THE DISTRICT' Risk Management & Benefits Office in accordance with agreed-upon terms. All specified services and requirements shall be provided to THE DISTRICT at the prices offered by Proposer in their submitted cost proposal.

Proposers must, in their submitted proposals, clearly present evidence that they are a competent and qualified individual and/or organization capable of providing the administrative services detailed herein. Proposers shall, in their submitted proposals, detail their experience, expertise, qualifications, and proposed methodology to provide the administrative services detailed in this Request for Quote.

3. MINIMUM QUALIFICATIONS

In order to be considered in the Request for Quote process, the Proposer must meet the following minimum requirements and submit a proposal in accordance with the enclosed specifications:

- A. The Proposer must possess the required licenses, certifications, and insurance to perform services in every area designated in the attached specifications;
- B. The Proposer must have over ten (10) years of experience providing Workers' Compensation Claims administration Services for educational and/or public agencies.
- C. The servicing office must be within a reasonable geographic radius from the Baldwin Park Unified School District's, district office.

4. SUBMISSION OF PROPOSALS

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of THE DISTRICT. Emphasis should be on completeness and clarity of content. THE DISTRICT should be provided with the following by the submission deadline: One (1) original proposal and (3) copies of the proposal, plus a PDF on a USB drive. All Proposal shall include the District Proposal Forms herewith.

Envelopes/packages must be labeled with the name of the Request for Quote, and the Proposer's business name, address on the exterior of the envelope/package. Written proposals shall be submitted in a sealed envelope and labeled as follows: **Request for Quote Response for: "Workers' Compensation Claims Administration Services"**

The proposal must be prepared in a clean and professional manner. No pencil figures or erasures permitted. Mistakes may be crossed out and corrections inserted adjacent thereto and must be initialed in ink by person signing proposal. No oral, telegraphic, facsimile, or telephonic modifications will be accepted.

THE DISTRICT shall not, under any circumstance, be liable for any pre-contractual expenses incurred by Potential Proposer, and Potential Proposer shall not include any such expenses as part of their proposal. Proposers are solely responsible for all costs related to proposal preparation, submission and documentation.

5. PROPOSAL FORMAT

Proposals should be submitted in the format and order outlined below. The proposal should present all information in a concise manner, neatly arranged, legible, and in terminology understandable by THE DISTRICT' Proposal Evaluation Committee. Each section of the proposal must be clearly identified with the following headings, and in the order specified. **The work plan shall describe how the Proposer would assist THE DISTRICT in reaching its goals as set forth in this Request for Quote.**

Use this section to address the ability of your firm to undertake the project, considering your firm's current and anticipated workload.

Each question must be answered in the order listed. Please provide responses to the following:

PROPOSER QUALIFICATIONS

- 1) Give a history/background of your firm.
- 2) Provide a copy of your third party claims administration certificate license to provide claims administration services in the State of California.
- 3) Provide the address of the location of the claim office that would be assigned to service the account. Are other school district clients managed from the proposed office? How many offices do you have in the state of California?
- 4) Describe the features and attributes that you believe distinguish your firm from other TPAs. Does your company maintain a public entity division within your organization?
- 5) Certify that the firm is not currently undergoing or anticipating any reorganization.
- 6) Has your firm ever been involved in litigation due to breach of contract, bad faith claims, fraud, or any other business tort?
- 7) Does your firm have profit-sharing agreements or arrangements with other vendors?
- 8) Please provide five (5) California school district references along with contact names and telephone numbers for which similar types of claims-related services are currently provided.
- 9) How many public entity clients do you serve in California? How many of those are education clients?
- 10) What predictive analytics capabilities does your company offer?

ACCOUNT ADMINISTRATION

- 1) The Examiner(s) assigned to handle indemnity claims for the District must have a minimum of seven (7) years' experience adjusting workers' compensation claims, experience with Education Code Benefits and possess a Workers' Compensation Claims Administration (WCCA) certificate. Supervisors must have a minimum of ten (10) years

of experience handling and supervising workers' compensation claims and possess a Workers' Compensation Claims Professional (WCCP) certificate. The District retains the right to review all experience for appropriateness and compliance with this requirement. Provide the name of the individual who would have overall responsibility for the account. Provide the names and functions of all personnel who will play key roles in the claims administration of the program.

- 2) Provide your firm's professional development plan and/or policy for adjusters and supervisors.
- 3) Describe your firm's current policies regarding the average number of claims (by type) assigned to each adjuster and supervisor.
- 4) Provide an organization chart for the proposed unit.
- 5) What internal audits does your company offer?
- 6) Please provide external audit scores you received from the DWC within the last two (2) years.
- 7) Describe your firm's philosophy and practice as it related to suspected fraudulent claims.
- 8) Describe the levels of supervision review provided on claims adjusting personnel.
- 9) Describe your information technology technical support services including the location of staff and how many clients are serviced from that location.

TRANSITION AND IMPLEMENTATION

- 1) Provide a sample proposed transition plan and implementation timetable, which THE DISTRICT can immediately implement after vendor selection.

CLAIMS ADMINISTRATION

- 1) Describe your company's best practices in claims, handling, claim supervision of litigated claims, claim status communication.
- 2) Describe your RMIS system available to your clients.
- 3) Describe your report producing capacity. Provide claim sample reports.
- 4) Describe how new claims can be entered in the system.
- 5) Can 5020 forms be filed electronically by THE DISTRICT.
- 6) Describe how your firm ensures compliance with workers' compensation statutes, rules and regulations promulgated by the Department of Industrial Relations.
- 7) Does your firm offer claimant's secured mobile applications (Apps) where they can access their claim from their mobile device?

ADDITIONAL INFORMATION

Please provide any additional data the proposer deems essential to the evaluation of the proposal.

COST PROPOSAL

Provide a fee proposal that includes a 3-year fee structure that encompasses TPA and MPN services.



Request for Quote

for

RFQ 18-1 Workers' Compensation Claims Administration Services

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4:00 p.m. on Friday September 22, 2017

FIRM NAME: _____

ADDRESS: _____

TELEPHONE: (_____) _____

FAX: (_____) _____

NAME OF CONTACT: _____

Email Address: _____

PROPOSAL FORM

TO: Purchasing Services Department acting by and through its Governing Board, 3699 N. Holly Ave., Baldwin Park, CA 91706, herein called the "District":

1.0 Proposal Amount.

1.1 Proposal Amount. Pursuant to and in compliance with the requirements in this document including addendum, the undersigned, has familiarized himself with the requirements affecting the performance of the contract and the cost of the work. Vendor proposes and agrees to perform, within the time stipulated, all component required to complete this project for the amount identified below. If awarded, Vendor understands and agrees that requirements under this document are part of the contract for work for:

RFQ 18-1 Workers' Compensation Claims Administration Services

TOTAL PROPOSAL AMOUNT:

(Write out the bid amount in words on the above)

Dollars (\$_____),

The undersigned vendor agrees to complete the work within time set forth in the contract documents.

In submitting this Proposal, the undersigned acknowledges receipt of all addenda issued by the District, as set forth below. The vendor confirms that this RFQ 17-8 Workers' Compensation Claim Administration Services:

_____ Addenda Nos. _____ received, acknowledge, and incorporated into this bid.
(Initial)

By submitting this quote, the vendor confirms that the listed company has checked all of the above figures and understands that neither the District nor any of its agents, employees, or representative shall be responsible for any errors or omissions on the part of the undersigned in preparing and submitting this quote.

Additionally, The District has the right to accept or reject all proposal for this project.

By: _____
(Chairman of the Board, President, or any Vice President authorized to enter into an agreement)

(Typed or Printed Name)

Title: _____

Sole Ownership....Partnership....Corporation....Other specify _____. Vendor to provide a W-9