

REQUEST FOR PROPOSAL NO.01C-017S- RFP FOR CLAIMS ADMINISTRATION SERVICES

DATE: January 6, 2006

PRESENTED TO BOARD: February 15, 2006

CONTRACT PERIOD: July 1, 2006 through June 30, 2008

DEPARTMENT: Various FUNCTION: Various OBJECT: Various FUND: Various

FUNDING SOURCE: Internal Services Budget-Self-Insurance Fund

REQUESTING DEPARTMENT: Director of Risk Management

FINANCIAL IMPACT

The financial impact to the Internal Service Budget is estimated at \$3,000,000. The source of funds is the Employee Benefits and Risk Management Department Budget.

Purchase orders processed from July 1, 2001 through January 5, 2006 total \$6,128,880.

CONTRACT RENEWAL

Term Contract No.01C-017S was awarded by Board action on July 1, 2001, to F.A. Richards & Associates for three year(s) from July 1, 2001 through June 30, 2004 with the option to renew for two additional two-year periods.

The first option to renew was exercised for the period July 1, 2004 through June 30, 2006.

The second and final option is now being exercised for the period of July 1, 2006 through June 30, 2008.

F.A. Richards & Associates have agreed to honor terms and conditions. Compensation for claims serviced under this contract shall be guaranteed annual fees as follows:

July 1, 2006 through June 30, 2007	\$1,365,120.
July 1, 2007 through June 30, 2008	\$1,419,720

Services to be provided include Claims Administration Services.

RECOMMENDATION: Based on satisfactory performance during the past contract period, it is recommended that the RFP for Claims Administration Services be renewed with F.A. Richards for the period July 1, 2006 though June 30, 2008.

Note: Original RFP document is available upon request.

KS
SB:DG: NK:ksb

REQUEST FOR PROPOSAL NO.01C-017S RFP FOR Claims Administration Services

DATE: January 23, 2004
PRESENTED TO BOARD: March 10, 2004

CONTRACT PERIOD: July 1, 2004 through June 30, 2006
DEPARTMENT: Various FUNCTION: Various OBJECT: Various FUND: Various
FUNDING SOURCE: Internal Services Budget – Self-Insurance Fund
REQUESTING DEPARTMENT: Director of Risk Management

FINANCIAL IMPACT

The financial impact to the Internal Services Budget is estimated as: follows: Year 4 \$1,268,226: Year 5 \$1,313, 614. The source of funds is the Internal Services budget.

Purchase orders processed from July 1, 2001 through January 22, 2004 total \$ 3,548,040.

CONTRACT RENEWAL

Term Contract No. 01C-017S was awarded by Board action on July 1, 2001, to F. A. Richards & Associates for 3 year(s) from July 1 through June 30, 2004 with the option to renew for 2 additional two-year periods.

The first option to renew is now being exercised for the period July 1, 2004 through June 30, 2006.

F. A. Richards & Associates has agreed to honor terms, conditions, and pricing of the existing contract for the forthcoming period.

Services to be provided include Claims Administration Services.

RECOMMENDATION: Based on satisfactory performance during the past contract period, it is recommended that the term contract for Claims Administration Services be renewed with F. A. Richards for the period July 1, 2004 through June 30, 2006.

Note: Original RFP / Bid document is available upon request.

SS: DG: NK

REQUEST FOR PROPOSAL NO. 01C-017S – RFP FOR CLAIMS ADMINISTRATION SERVICES

DATE:	July 2, 2001	DATE ADVERTISED:	May 18, 2001
DATE SOLICITED:	May 15, 2001	DATE OPENED:	June 19, 2001
PRESENTED TO BOARD:	July 11, 2001	DATE POSTED:	July 2, 2001

CONTRACT PERIOD: July 1, 2001 through June 30, 2004
 DEPARTMENT: Various FUNCTION: Various OBJECT: Various FUND: Various
 FUNDING SOURCE: Internal Services Budget – Self Insurance Fund
 REQUESTING DEPARTMENT: Director of Risk Management
 40 RFPs Solicited, 10 Responses (5 RFPs, 5 No Proposal) 30 No Response
 2 M/WBEs Solicited, 0 M/WBE Responses (0 RFPs, 0 No RFPs) 2 M/WBE No Response

FINANCIAL IMPACT

The annual financial impact to the Internal Services budget is estimated as follows: Year 1 - \$1,140,640; Year 2 - \$1,182,060; Year 3 – \$1,225,340. The source of funds is the Internal Services budget.

Purchase orders processed from July 1, 1998 through June 30, 2001 total \$ 3,485,100.

Services to be provided include third party claims administration services for the District's self-insurance program. The District is self-insured for its liability (automobile and general liability) and workers' compensation exposures. The claims administrator will provide all specified adjusting services for all claims as well as other required services, such as administrative, managed care, computerized claims/loss statistical information and banking/loss fund reconciliation.

<u>VENDOR</u>	<u>MINORITY STATUS</u>	<u>TOTAL POINTS AWARDED</u>
CRAWFORD & COMPANY	--	62
JLT INSURANCE SERVICES	--	73
JOHNS EASTERN	--	75
McCREARY CORPORATION	--	67
F.A. RICHARD & ASSOCIATES	--	<u>87</u>

LEGEND:
 _____ = Award
 () = Reject

MINORITY - (2-Black, 3-Hispanic, 4-Indian/Alaska, 5-Asian, 6-Women, 7-Disabled, 8-Other)

CONSIDERATION OF INDEMNIFICATION: Awardee(s) recognizes that in order to comply with FS 25.06 the District must include an amount paid to the awardee(s) in consideration for the awardee(s) agreeing to indemnify the District. The amount of TEN DOLLARS (\$10) to be included on the awardee(s) initial invoice, per Special Condition, Indemnification and Hold Harmless, as consideration for this contract.

The Evaluation Committee, consisting of District staff, convened and reviewed all responsive proposals. It is the recommendation of the Committee to award this contract to the highest rated proposer, F. A. Richard and Associates.

RECOMMENDATION: I recommend contract award be made to the highest rated responsive, responsible proposer, F. A. Richard and Associates, based on the evaluation criteria outlined in the RFP.

Failure to file a protest within the time prescribed in s. 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes. Offers from the vendors listed herein are the only offers received timely as of the above opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late.

If a proposer wishes to protest a RFP, they must do so in strict accordance with the procedures outlined in FS 120.57(3). Any person who files an action protesting a decision or intended decision pertaining to this RFP pursuant to FS 120.57(3)(b), shall post with the Purchasing Department, at the time of filing the formal written protest, a bond secured by an acceptable surety company in Florida payable to the School District of Palm Beach County in an amount equal to 1 percent (1%) of the total estimated contract value, but not less than \$500 nor more than \$5,000. Bond shall be conditioned upon the payment of all costs that may be adjudged against the protester in the administrative hearing in which the action is brought and in any subsequent appellate court proceeding. In lieu of a bond, a cashier's check, certified bank check, bank certified company check or money order will be acceptable form of security. If, after completion of the administrative hearing process and any appellate court proceedings, the District prevails, it shall recover all costs and charges included in the final order of judgment, including charges by the Division of Administrative Hearings. Upon payment of such costs and charges by the protester, the protest security shall be returned. If the protest prevails, he or she shall recover from the District all costs and charges, which shall be included in the final order of judgment.

SS:DN:SB:DH *[Handwritten initials]*

RFP 01C-017S
REQUEST FOR PROPOSAL FOR CLAIMS ADMINISTRATION SERVICES

Evaluation Criteria	CRAWFORD & COMPANY	JLT INSURANCE SERVICES	JOHNS EASTERN	MCCREARY CORP.	RICHARD & ASSOCIATES
1. Experience and Qualifications of Firm/Staff (Points Available: 35)	32	25	32	32	32
2. Approach/Methodology (Points Available: 25)	20	18	20	20	25
3. Cost of Services (Points Available: 30)	10	30	23	15	25
4. Minority/Women Business Participation (Points Available: 10)	0	0	0	0	2
GRAND TOTAL	62	73	75	67	87