CITY OF JOPLIN - TPA - RFP - REVIEW			MARCH 2018		SUMMARY					
TPA Information NAME			CCMI	THOMAS MCGEE	BRENTWOOD	IPMG	CCMSI	ACTION CLAIMS ADMINISTRATORS	MACKINAW ADMINISTRATORS	PMA COPANIES
- Location			ST LOUIS MO	KANSAS CITY MO	ST LOUIS MO	ST LOUIS MO	NORMAN OK	BRYANT AR	OVERLAND PARK KS	SCHAUMBERG ILL
	est # of Takeover Claims	avg # of Claim per year								
Workers' Compensation										
- Medical Only	53	55	150	150	150	250	165	150	135	125
- Indemnity	15	15	960	850	950	1,500	875	850	800	695
Casualty						no pricing provided	no pricing provided		no pricing provided	
- Public Officials	1	1	650	720	600	0	0	600	0	995
- Law Enforcement	3	5	650	720	600	0	0	600	0	995
- General Liability PD	25	43	600	625	600	450	465	200	800	610
- General Liability BI	10	10	600	625	600	650	875	600	800	610
- Auto Liability PD	6	45	600	625	600	450	450	600	600	610
- Auto Liability BI	3	6	600	625	600	550	450	600	600	610
Property							no pricing on property clms			
- Auto Physical Damage	10	10	300	350	600	350	275	200	500	375
- Property	2	10	500	350	600	350	0	500	400	575
Other Fees										
- Administrative Fee (annual)			0	9,250	0	5,000	16,041	5,000	34,400	5,000
- Incident/Record Only Cost			0	40	50	0	35	50	0	40
- RMIS Fee			0	0	0	0	5,000	0	0	4,500
One Time Fees			CCMI	THOMAS MCGEE	BRENTWOOD	IPMG	CCMSI	ACTION CLMS	MACKINAW	PMA
- Data Conversion			0	4,000	0	12,500	0	1,500	0	7,500
- Implementation Fee			0	1,000	0	0	5,000	1,000	0	0
******Additional Fees******						atty rep clms-150; excess reportable clms-150; MSA-150; subro-150; monthly run off fee 50 p/clm p/m		loss control service 100 per hour avgs 20-30 hrs to complete. Total est 3000	125 per hour	loss control 140 hr, phne case mgt 95hr, customize IT report 95hr, section 111 reports 6per queried
Claims Fee Total (est annual)			96,950	97,320	100,500	92,650	76,645	76,800	101,425	96,210
Annual Fee Total			0	9,250	0	5,000	21,041	5,000	34,400	9,500
Annual Medicare Reporting			0	0	5,000	150 per clm	25 per clm	incl in annl fee	incl in annl fee	6 per claim
			no fee listed in proposal may be charge or we have to outsource	no fee listed in proposal may be charge or we have to outsource						
Annual Program Total			**96,950**	**106,570**	**105,500**	**97,650**	**97,686**	**81,800**	**135,825**	**105,710**

One Time Fee Total			0		5,000		0	12,500		5,000	2,500	0	7,500
								any open claims that will be transferred to them fee for run in fee 500 indem, 100 mo.					
Take Over Fees - Approximate annual RUN IN FEE			0		18,000		1,000	18,000		1,200	1,000	30,800	12,895
												in additon to take over fee, they charge the following fee: per clm-600 AL clm, 800 GL clm, 800 wc clm	take over fee for yr 1=250wcLT, 100wcmo,250al, 150phd,250glbi, 250glpd,250pro,895prof.
Program Total			**96,950**		**129,570**		**101,500**	**128,150**		**103,886**	**85,300**	**166,625**	**126,105**
Bill Review and Repricing			0		0		6 per bill	8 per bill		9 per bill	8.5 per bill	1.05 per line	8.50 per bill
PPO Reductions			0		0		25% of savings	24% of savings		28% of savings	28% of savings	28% of savings	29% of savings
FLAT RATE PROPOSAL	ANNUAL						102,000				60,000		
FLAT RATE PROPOSAL	MONTH						8,500						
Scoring			CCMI		THOMAS MCGEE		BRENTWOOD	IPMG		CCMSI	ACTION CLMS	MACKINAW	PMA
Methodology 25%													
Experience 25%													
References 15%													
Cost of Service 25%													

EVALUATION - TOP TWO FINALIST									
RATING CATAGORIES AND SCORE OPTIONS			COMMENTS THOMAS MCGEE				COMMENTS BRENTWOOD		
LOCATION			Thomas McGee is located in downtown KC. Per google map it is 157 miles from Joplin.		Driving time - 2.5 hrs		Brentwood is located in St. Louis Mo. is 284 miles from Joplin.	Driving time - 4.5 hrs	
PRICE			MO-150; LT 850. Liab other=720. GL and AL = 625. ALPD=625. PROPERTY=600. AUTOPHYSDMG=350. INCIDENT ONLY=40 ANNUAL ADMIN FEE 9250 DATA CONV FEE - 4000 1x TAKE OVER FEE - 1000 1x RIMS FEE - 0 ANNUAL MEDICARE - ?		MO=8; LT=4; LIAB OTHER =4 GLBI=6 ALBI=6; GLPD=6; ALPD=6; APHYD=8, PROP=8; INC=6 ADMIN=0 DATA=4 TAKE OVER=6 RIMS =10		MO-150 LT-950 LIAB OTHER-600 ALBI ALPD GLBI GLPD AUTOPHYSDM PROP= 600 EACH. ANNUAL ADMI FEE = 0 DATA CONV FEE=0 TAKE OVER FEE = 0 RIMS FEE - 0 ANNUAL MEDICARE - 5000	MO-8 LT-2 LIAB OTHER=8 ALBI-8 ALPD-8 GLPD-8 GLBI-8 AUTOPHYSDMP-4 PROP-4 INCIDENT ONLY - 6 ADMIN=10 DATA CONV = 10 TAKE OVER = 10 RIMS = 10	
ADJUSTERS			AVG TENURE = 16 YRS		IN BUSINESS SINCE THE EARLY 1900's IN THE INSURANCE AND RELATED BUSINESS		TENURE AT BRENTWOOD = LESS THAN 1 YEAR TENURE IN CLAIMS = 17+YRS ALL THE ADJUSTERS THAT WILL HANDLE OUR ACCOUNT WILL BE FORMER CCMI ADJUSTERS,	BRENTWOOD IS A NEW STARTUP IN MISSOURI BUT BEEN IN BUSINESS ALONG TIME IN OTHER AREA'S. THE ADJUSTERS THAT THEY HAVE HIRED COME FROM CCMI WHO HAS HAD 17 YRS WITH THEM IN WC. FOR THE COJ SINCE COMPANY STILL HAS FINAL SAY AND WE HAVE NO HISTORY WITH THEM, WILL AWARD HALF THE POINTS	
COMPANY/STABLITY			FOUNDED IN 1910 IN KC, STILL IN KC. FULL SERVICE AGENCY OVER 50 YEARS OF SERVICE CONDUCTS SATISFACTION SURVEYS TO CLIENTS. PRIVATELY HELD. IN 2 STATES MISSOURI AND KANSAS		VERY STABLE COMPANY AND WELL RESPECTED. 100 EMPLOYEE, PRIMARLY IN KC AREA, HAS NEW OFFICE IN ST. LOUIS COMMITTED TO MISSOURI AND KANSAS CLIENTS. OPERATES IN TWO STATES 0% TURNOVER FOR LAST 3 YEARS. HAS NUMEROUS LOCAL AND COUNTY GOVEMENT ENTITIES AS CLIENTS.		STARTED IN 1990. THEY ARE NEW TO MISSOURI, BEEN IN BUSINESS 28YRS. HAS NEW OFFICE AND APPROX 20 EMPLOYEES WITH MORE SCHEDULE TO BE ADDED AS BUSINESS IS ADDED. ESOP COMPANY. MISSOURI BUSINESS IS FOCUSED ON AQUIRING THE CCMI BUSINESS, GROWTH BY ATTRITION IS UNKNOWN AT THIS POINT. IN 28 STATES, JUST ADDED MO.	220 EMPLOYEES IN 11 OFFICES THIS IS FIRST VENTURE INTO MISSOURI . HEADQUARTERED IN BRENTWOOD TN. OFFICES IS CHARLOTTE, NC, RALEIGH NC, CHAMPAIGN IL, BIRMINGHAM AL, ROZEMAN MT, CARMEL IN. TURNOVER RATE 15% FOR LAST 3 YEARS. HAS NO HISTORY OF MISSOURI LOCAL AND COUNTY GOV CLIENTS. HAVE HIRED ADJUSTER FROM CCMI THAT HAVE THAT EXP.	

SUPPORT TO CLIENT			OFFERS BROKERAGE SERVICE, EMPLOYEE BENEFITS, CAPTIVES, TPA, SURETY, PERSONAL RISK INS., SAFETY AND LOSS CONTROL, CLAIMS ADVOCACY				OFFERS LOSS CONTROL SERVICES INCLUDING RISK MANAGEMENT PARTNERSHIP CLIMS MGT, PROG MGT, MANGED CARE, LOSS CONTROL, BROKERAGE, UNDERWRITING		
COMMUNICATIONS			ADJUSTERS HAVE COMPANY ISSUED CELL PHONES FOR 24/7 CONTACT. WILL ASSIGN 5 TEAM MEMBERS TO SERVICE OUR ACCT.				CAN ACCEPT CLAIMS 7 DAYS A WEEK 24 HOURS A DAY. NO COMMENT MADE ON 24/7 CONTACT WITH ADJUSTER POSSIBLE.		
EASE OF TRANSITION			THEY HAVE MOVED CLAIMS BUSINESS FROM CCMI TO THOMAS MCGEE, HAVE DEVELOPED A TRANSITION PLAN WITH A TIMELINE TO COMPLETE TRANSACTION				HAS SUCESSFULLY COMPLETED OVER 80 CLAIM DATA CONVERSIONS AND IS NOW CONDUCTING CONVERSONS FROM OUR CURRENT TPA CCMI.	HAS WAIVED MOST OF THE NEW ACCT SET UP CHARGES, SINCE THEY ARE WANTING TO TAKE OVER CCMI BUSINESS.	
MONTHLY/QUARTERLY/ANNUAL REPORTING			WILL SET UP REPORTING STRUCTURE THE WAY WE WOULD LIKE IT. THEY DO CONDUCT AND PREPARE AND ANNUAL STEWARDSHIP REPORT				UNDER THE QUESTION OF CLAIM AUDITS THEY ANSWERED THE QUESTION THE WAY THEY HANDLE INTERNAL CLAIM REVIEW NOT CLIENT REVIEWS. HOWEVER FEEL WITH FORMER CCMI STAFF REPORTING WILL BE IN LINE WITH EXPECATIONS	NO COMMENT MADE OF STEWARDSHIP REPORT	
LEADERSHIP			LONG TERM TENURE FOR LEADERSHIP. HAVE KNOWN ED REASONER FOR MANY YEARS, WHO WOULD BE THE SENIOR PERSON ON OUR ACCOUNT. HE IS WELL RESPECTED AND VERY KNOWLEDGEABLE IN TPA AND INSURANCE.				NO LEADERSHIP KNOWLEDGE OF THE COMPANY, NEW TO MISSOURI. HAVE HIRED SEVERAL CCMI MGT, STAFF AND SUPPORT PERSONNEL. IN PROPOSAL OUTLINE THAT TWO MORE WILL BE MOVING TO THEM IN APRIL. THAT WOULD COMPLETE THE ENTIRE TEAM FROM CCMI TO BRENTWOOD. HOWEVER, SENIOR MANAGMENT IS UNKNOWN TO COJ.		
EXPERIENCE			OVER 50 YRS OF EXPEREICNE IN THE INSURANCE AND TPA BUSINESS.				28 YRS IN BUSINESS IN TPA		

MEDICAL/TRIAGE			YES THEY HAVE TRIAGE PROGRAM				NO TRIAGE PROGRAM		
SUMMARY COMMENTS			RFP VERY PROFESSIONAL AND EASY TO READ. ANSWERED EACH ? WITHOUT REFERING TO ANOTHER SECTION. LOCALLY OWNED AND OPERATED. LONG TIME IN BUSINESS PRIVATELY HELD WE HAVE NO WORKING EXP WITH THEM. HAS MORE SET START UP CHARGES THAN COMPETITOR MAKES THEIR PRICE HIGHER		PROVEN IN MISSOUI, LONG TIME PLAYER WITH GOOD RESULTS. ALWAYS STAYED IN CONTACT WITH COJ EVEN AFTER LOSING THE BID IN 2015 BY JUST A FEW POINTS, THEY WERE A CLOSE 2ND PLACE AND PRIMALY DID NOT GET THE BUSINESS BECAUSE CCMI HAD BEEN OUR TPA FOR 20YEARS AND DID NOT GIVE US A REASON TO LEAVE THEM.		THEIR RFP LONG AND REPEATED SEVERAL ITEMS THROUGHOUT. HARD TO READ AND FOLLOW. HAD TO DIG FOR THE INFORMAITON NEEDED.	NOT YET PROVEN IN MISSOURI AS A VIABLE PLAYER. DO HAVE MOST OF THE ADJUSTERS THAT HANDLED OUR ACCOUNT WHILE AT CCMI, WITH PLAN TO HIRE THE REMAIING TWO IN APRIL.
scoring matrix		**220**	**THOMAS MCGEE**	**PTS**	**BRENTWOOD**	**PTS**			
LOCATION in relation to Joplin	**MAX PTS**	**10**							
within 100 miles	10								
within 101-200 miles	8		157 miles	8					
within 201-300 miles	6				284 miles	6			
over 301 miles	4								
PRICING	**MAX PTS >**	**120**							
WC med only < $100	10								
WC med only 101-150	8		150	8	150	8			
WC med only > 150	4								
WC lt only <$500	**10**	10							
WC lt 501-600	8								
WC lt 601-700	6								
WC lt 701-800	4								

WC lt 801-900	2		850	2		
WC lt 901-1000	0				950	0
Liability PD <500	**20**	20				
Liability PD 501-600	8				GL PD - 600 = 8 AL PD - 625 = 6	14
Liability PD 601-700	6		GL PD - 625 = 6 ALPD - 625 = 6	12		
Liability PD > 700	4					
Liability BI < 500	**20**	20				
Liability BI 501-600	8				GL BI - 600 = 8 AL BI - 625 = 6	14
Liability BI 601-700	6		GL BI - 625 = 6 AL BI - 625 = 6	12		
Liability BI > 700	4					
Liability Other <500	**20**	20				
Liability Other 501-600	8				PO - 600 = 8 LE - 600 = 8	16
Liability Other 601-700	6					
Liability Other > 700	4		PO - 720 = 4 LE - 720 = 4	8		
Property <300	**10**	10				
Property 301-400	8					
Property 401-500	6		PROP - 500 = 6	6		
Property 501-650	4				PROP - 600 = 4	4
Property > 650	2					
APDMG < 300	**10**	10				
APDMG 301-400	8		AUTO PHYS DMG - 350 = 8	8		
APDMG 401-500	6					
APDMG 500-600	4					
APDMG > 600	2				AUTO PHYS DMG - 600 = 2	2

INCIDENT ONLY - NO FEE	**10**	10				
INCIDENT ONLY 1-$25	**8**					
INCIDENT ONLY >25	**6**		40 = 6	**6**	50 = 6	**6**
OTHER NOC < 300	**10**	0	NA		NA	
OTHER NOC > 301	**6**		NA		NA	
ADMINISTRATION FEE'S		10				
ADMIN FEE = 0	**10**				ZERO ANNUAL ADMIN FEE = 10	**10**
ADMIN FEE = 1-2500	**8**					
ADMIN FEE - 2501-5000	**6**					
ADMIN FEE = 5001-7500	**4**					
ADMIN FEE = 7501 - 10000	**2**		9250 ANNUAL ADMIN FEE = 2	**2**		
ADMIN FEE > 10000	**0**					
IMPLEMENTION FEES		10				
IMPLEMENTATION FEE = 0	**10**				ZERO IMPLEMENTATION FEE = 10	**10**
IMPLEMENTATION FEE = 1-500	**8**					
IMPLEMENTATION FEE = 501-1000	**6**					
IMPLEMENTATION FEE > 1000	**4**		4000 IMPLEMENTATION FEE = 4	**4**		
TAKE OVER FEE'S		10				
TAKE OVER FEE CURRENT CLMS = ANY = $0	**10**		NA		NA	
TAKE OVER FEE CURR CLMS 1-$1000	**6**		NA		NA	

RIMS		10							
RIMS FEE 0	10								
RIMS FEE 1-1000	6				1000 FEE = 6	6			
RIMIS FEE > 1000	0		5400 FEE = 0	0					
ADJUSTERS	**MAX PTS**	10							
> 20YRS EXP	10				EXP OF ADJUSTERS PLUS WORKED COJ ACCOUNT FOR > 15 PLUS YR	10			
10-20 YRS EXP	8		AVG TENURE 16YRS = 8	8					
5-9 YRS EXP	6								
< 5YRS EXP	4								
COMPANY/STABLITY	**MAX PTS**	10							
> 30YRS AS MULTI LINE TPA	10		FOUNDED IN 1910 = 10	10					
20-29 YRS AS MULTI LINE TPA	8				STARTED IN 1990 = 8	8			
10-19 YRS AS MULTI LINE TPA	6								
5-9 YRS AS MULTI LINE TPA	4								
<5 YRS AS MULTINE TPA	0								
SUPPORT TO CLIENT	**MAX PTS**	10							
HIGH	10		OFFERS MANY SERVICES = 10	10	OFFERS MANY SERVICES = 10	10			
MEDIUM	8								
LOW	2								
COMMUNICATIONS	**MAX PTS**	10							

ABOVE AVERAGE	10		ADJUSTER HAVE CO. ISSUED PHONES 24/7 7DAYS WK = 10	10					
AVERAGE	8				GAVE LISTING FOR ONLY OFFICE CONTACT = 8	8			
BELOW AVERAGE	2								
EASE OF TRANSITION	**MAX PTS**	10							
ABOVE AVERAGE	10		HISTORY OF TRANSFER FROM CCMI TO THEIR DATA BASE = 10	10	HISTORY OF TRANSFER FROM CCMI TO THEIR DATA BASE = 10	10			
AVERAGE	8								
BELOW AVERAGE	6								
REPORTING	**MAX PTS**	10							
ABOVE AVERAGE	10		LISTED ANNUAL STEWARDSHIP REPORT = 10	10					
AVERAGE	8				DID NOT LIST STEWARDSHIP, REPORTING AVG = 8	8			
BELOW AVERAGE	6								
LEADERSHIP	**MAX PTS**	10							
MGT YRS IN TPA BUSINESS >20	10		LEADERS LONG TERM IN BUSINEES = 10	10					
MGT YRS IN TPA BUSINESS 19-10	8				NEW TO MISSOURI NO HISTORY = 8	8			
MGT YRS IN TPA BUSINESS <10	6								
EXPERIENCE	**MAX PTS**	10							
EXP YRS IN TPA BUSINESS >20	10		OVER 50 YRS = 10	10	28 YRS = 8	10			
EXP YRS IN TPA BUSINESS 19-10	8								
EXP YRS IN TPA BUSINESS <10	6								

HAS MEDICAL TRIAGE PROGRAM	MAX PTS	10				
YES	10		HAS MEDICAL TRIAGE PROGRAM = 10	10		
NO	6				WILL ADD THE TRIAGE COMPANY WE USE NOW IF THEY GET BUSINESS	6
		MAX POSSBLE	THOMAS MCGEE	PTS	BRENTWOOD	PTS
SUMMARY - COMMENTS - T0TALS		360		164		174
BONUS POINTS						
INTERVIEW EVALUATION	MAX 10 PTS	PER RESPONSE	THOMAS MCGEE	PTS	BRENTWOOD	PTS
PROFESSIONAL PRESENTATION			very good	10	good	8
ANSWERED QUESTIONS CLEAR, CONCISE AND WITH CONFIDENCE			yes	9	yes	9
KNOWLEDGE AND CONFIDENCE IN THEIR SERVICE			yes	9	yes	9
FLEXABLITY IN ADJUSTING SERVICES TO FIT OUR NEEDS			willing to but did not commit to	7	willing to adjust to what we want	9
FLEXABLITY IN PRICING ADJUSTMENTS			has annual fee, did not say they would adjust	4	said would adjust fees	10
COMMITMENT TO REPORTING STRUCTURE WE DEMAND			yes	9	yes	9
RISK MANAGEMENT LOSS CONTROL SERVICES, WILL THEY WORK WITH AJG			good	9	good	9
COMFORT WITH TEAM ASSIGNED TO COJ			new and unknown	6	know the adjusters and have worked with them	10
QUARTERLY REVIEW MEETING IN PERSON JOPLIN			yes	10	yes	10
MONTHLY CLAIMS REVIEW CALLS			yes	10	yes	10
WHAT MAKES THEM THE RIGHT CHOICE			experience	8	adjusters	10
WHY SHOULD WE CHOOSE THEM OVER THE COMPETITOR			experience	6	work with adjuster at ccmi	9
BONUS SECTION SCORE				97		112
TOTAL SCORE WITH BONUS				261		286