



**REQUEST FOR PROPOSAL
FOR
WORKERS' COMPENSATION
THIRD PARTY ADMINISTRATOR**

**Must be received no later than:
Monday April 28th, 2025 @ 5:00 p.m.**

**Proposals Should Be Delivered to:
Wendy Daniel
Director of Benefits and Classified Personnel
Wilson County Schools
117 N.E. Tarboro Street, Wilson NC 27893
Or
P.O. Box 2048 Wilson, NC 27894**

INTRODUCTION

Wilson County Schools is seeking experienced and qualified Third Party Administrator (TPA) to provide cost effective workers' compensation claims administration. Wilson County Schools, invites all qualified TPAs to submit a proposal in accordance with the requirement outlined in this request for proposal. The contract period shall be for one year, with the option to renew for two successive year terms. Renewals will be mutually agreed upon by both parties.

BACKGROUND

Wilson County Schools has a population of just over 12,000, and is situated 45 minutes southeast of Raleigh. Wilson County Schools employs a workforce of about 1500 permanent employees and 100+ temporary staff members. Additional information regarding the Wilson County Schools may be obtained at www.wilsonschoolsnc.net

Currently, Wilson County School's TPA is Standard Insurance.

From 2019 to 2024, our organization has incurred a total Workers' Compensation expenditure of \$135,288, with open injury costs amounting to \$75,282. Indemnity/lost time costs reached \$237,969, with open costs of \$63,605. Additionally, expenses totaled \$32,005, with \$8,691 remaining open. Our open injury cases account for approximately 5% of total injuries within this period. On average, we process 50 to 100 new claims annually, highlighting the ongoing need for effective claims management and cost-containment strategies.

Medical Provider Network (MPN)

Wilson County Schools utilizes the Wilson Immediate Care and requires the TPA work closely with the Wilson Immediate Care clinic in all workers compensation claims.

TENTATIVE SCHEDULE FOR SELECTION PROCESS

Event	Date/Time
Issue Date of Solicitation	04/04/25
Deadline for Receipt of Proposal	04/28/2025 5pm
Review Period of Proposals	4/29/25-5/16/25
Recommendation to the Board	5/19/25

CONTACTS

Any administrative questions regarding bidding procedures and to the project management should be directed to: Shannon Collins, Chief Financial Officer at (252) 399-7700; shannon.collins@wilsonschoolsnc.net

AWARD OF CONTRACT

Wilson County Schools reserves the right to reject any and all proposals, to contract work with whomever and in whatever manner the school district decides, to abandon the work entirely and to waive any informality or nonsubstantive irregularity as the interest of the school district may require and to be the sole judge of selection process. Wilson County Schools also reserves the right to negotiate separately in any manner to serve the best interest of the school district. Wilson County Schools retains the right at its sole discretion to select a successful vendor.

SELECTION PROCESS

The Purchasing Manager will evaluate all responses to the RFP that meet the submittal requirements. The Purchasing Manager will rank the proposals and arrange interviews with the finalists prior to selection.

The Purchasing Manager will consider the following criteria when evaluating the proposals:

- Demonstrated experience in the Workers' Compensation and Risk Management field
- Demonstrated relationships with medical providers
- Innovative approach to reducing claims
- Demonstrated competent, knowledgeable and sufficient staffing levels

Other factors such as quality and thoroughness of the proposal; quality and thoroughness of the interview; references (including at least three municipalities); and cost proposal will also be measured in the final evaluation. A mutually acceptable contract will be negotiated between Wilson County Schools and the TPA.

The TPA will be required to comply with Wilson County Schools nondiscrimination and affirmative action provisions.

If Wilson County Schools and the selected consultant team cannot agree on a satisfactory contract, Wilson County Schools reserves the right to terminate negotiations. Wilson County Schools will then negotiate an agreement with the consultant team which ranked second. It is expected that the TPA will be able to begin work on July 1, 2025.

REQUIRED ELEMENTS OF SUBMITTALS

I. Submission Requirements and Instructions

All bidder requirements in this section are mandatory. Wilson County Schools reserves the right to waive any non-material variation.

Submit one original proposal package, two complete copies for each proposal, under sealed envelope, by mail or hand-delivery to the address shown on the front and one electronic copy in pdf file format to wendy.daniel@wilsonschoolsnc.net

Each submission must be marked on the outside with the Company's name and the name of the project.

Wilson County Schools participates in the North Carolina electronic Vendor Portal (eVP), which is the State of North Carolina's system to connect vendors with state government organizations that purchase goods and services. To formally bid on this solicitation you must be registered as a vendor in the eVP and your account must be active. Please visit <https://eprocurement.nc.gov/> to learn more about eVP and <https://evp.nc.gov/> to register as a vendor and activate or verify your account.

II. Proposal Outline and Content Assembly

Please submit each proposal in the order below with the required content/questions addressed. The order in which items are presented is important, as proposal evaluators will follow this order:

BIDS CONSIDERED RESPONSIVE WILL MINIMALLY ADDRESS EACH OF THE TOPICS AND SUB-TOPICS BELOW. ALL INFORMATION IN THE PROPOSAL MUST BE PRESENTED IN THE FOLLOWING SEQUENCE:

- a) Table of Contents
- b) Cover Sheet. This sheet will serve as the cover of your proposal and must be signed by an officer authorized to bind the company.
- c) Company Description (not to exceed three pages)
 - Describe your organization. Include history, ownership, location of headquarters and satellite offices, size and structure of the organization.
 - Brief history of the company that includes the date of establishment and examples of relevant prior bids and current customers of similar attributes to Wilson County Schools of Wilson.
 - Legal name and address; if the company is wholly owned subsidiary of a “parent company”, identify the “parent company”; legal form of company (partnership, corporation, joint venture, etc.); the office that will be servicing Wilson County Schools if there are multiple locations.
- d) Qualification/Capability (not to exceed 20 pages)
 - Overview of your company’s experience in handling Workers' Compensation (WC) claims
 - Key personnel involved in claims management, their qualifications, and expertise.
 - Description of how your company manages WC claims, including cost containment, injury management, and compliance with relevant regulations.
 - Technology and reporting tools used for claims tracking and analysis.
 - Risk mitigation strategies to reduce claims and overall WC costs
 - Workflow for handling new claims and ongoing injury cases.
 - Any industry accreditations or certifications that demonstrate compliance with WC regulations.
 - Internal audit and quality assurance measures to ensure accurate claims processing.
- e) References (minimum one) specifically in local/municipal/county/state agencies
 - Name of agency
 - Contact name to include: title, phone number and email
 - Population of jurisdiction • Number of employees
 - Project start and completion date
 - Brief summary of project
- f) Cost
 - Detailed information on the deliverables and the FIXED FEE for the term of the contract and the option of renewing for two successive one-year terms.
 - Identify which areas of proposal you deem as OPTIONAL with a reference to the pricing for optional services.

ADDITIONAL INFORMATION

Requests for Supplemental Information

Wilson County Schools reserves the right to require the submission of additional information that supplements or explains proposal materials.

Rejection of Proposals

Wilson County Schools also reserves the right to reject any or all proposals.

Reimbursement of Costs

No reimbursement whatsoever will be made by Wilson County Schools of any costs incurred by TPAs candidates related to the preparation or presentation of proposals.

Transfer of Interest

No interest in the contract shall be transferred to any other party without permission of Wilson County Schools.

Public Record

All responses to the Request for Proposal will become the property of Wilson County Schools. Once a final award is made, all bid responses, except financial and proprietary information, become a matter of public records. Wilson County Schools shall not in any way be liable or responsible for the disclosure of any such records or portions thereof if the disclosure is made pursuant to a request under the Public Records Act.

SCOPE OF SERVICES

The scope of work under the proposed agreement may include, but is not limited to the following:

A. Condensed Claims Administration Responsibilities

1. Accept and process injury reports 24/7, forwarding relevant details to a claims representative promptly.
2. Determine liability for claims per North Carolina Workers' Compensation Laws.
3. Process claims per North Carolina Industrial Commission regulations.
4. Evaluate open claims and advise Wilson County Schools on proper resolution.
5. Maintain detailed claim files, including medical, factual, and financial records.
6. Compute and disburse temporary disability benefits in a timely manner.
7. Assess permanent disability and facilitate informal ratings to minimize litigation.
8. Assist employees with necessary paperwork for permanent disability ratings.
9. Process and pay all settlements, awards, and pensions.
10. Maintain reserve estimates for reported claims.
11. Conduct investigations to assess eligibility and third-party liability.
12. Report excess claims to reinsurance carriers.
13. Coordinate rehabilitation services when needed.
14. Set up and manage benefit payments per Wilson County Schools' requirements.
15. Prepare required reports for North Carolina and other regulatory agencies.
16. Participate in quarterly case management reviews for complex claims.
17. Provide Wilson County Schools staff with access to the claims system.
18. Collaborate with HR to monitor injury trends and improve workplace safety.
19. Report program performance quarterly, highlighting key metrics.
20. Review contract costs with HR, including medical, administrative, and investigative expenses.

B. Medical Management

1. Provide Wilson County Schools with a predictable Workers' Compensation budget and continue to contain Wilson County Schools's costs.
2. Authorize, review and monitor all medical treatment required on injury or illness claims. Audit and pay all medical expenses.

3. Maintain close contact with treating physicians to ensure employees receive proper medical treatment and are returned to full employment at earliest date.
4. Consult frequently with Wilson County Schools in those cases where injury residual might involve restriction and/or retirement potential.

C. Legal Administration

1. Refer litigated cases to Wilson County Schools's attorney for purposes of defending Wilson County Schools interests before Workers' Compensation Appeals Board and the court.
2. Work closely with counsel in preparing defense of litigated cases.
3. Obtain Wilson County Schools's authorization on all settlements or stipulations when required.
4. Work closely with the applicant's attorney and legal counsel in informal dispositions of litigated cases.
5. Attend, when required, Workers' Compensation Appeals Board hearings.
6. Discharge on behalf of Wilson County Schools all legal obligations to its injured employees imposed by Workers' Compensation Appeals Board and higher courts.
7. Protect and preserve Wilson County Schools interests in all potential subrogation cases.

D. Statistical

1. Report to Wilson County Schools, monthly status of claim payments and reserves on an individual claim basis and in the aggregate.
2. Report to Wilson County Schools, quarterly loss analysis of claims filed by frequency and severity.
3. Assist in the preparation of all reports required by the State of North Carolina or other Governmental agencies relating to Workers' Compensation claims.
4. Provide the following reports on a monthly basis at minimal at Wilson County Schools discretion.
 - o Claim Logs
 - o Claim Activity
 - o Claim Cost Detail
 - o Claim Cost Summary
 - o Claim Cost Summary by Year
 - o Examiner Activity
 - o Examiner Case Log

- o Frequency Reports
- o Location Summary
- o Management Summary
- o Multiple Claims Listing
- o Occurrence Cost
- o OSHA Reporting/Requirements
- o Payment Type Totals
- o Vendor Payments Detail
- o Vendor Payments Summary
- o State Annual Report

E. Transition To ensure an orderly transition, Wilson County Schools may require the following:

1. As part of the response, TPA must submit an Implementation Plan which Wilson County Schools can immediately implement after vendor selection, describing all requirements for Wilson County Schools to change its panel of providers. Monthly fixed price payments to the TPA by Wilson County Schools will commence after the contract has been signed by all involved parties, and continue thereafter.
2. At the inception of the contract, the TPA will assume medical management responsibilities for all open claims and any new or reopened claims. Wilson County Schools will provide assistance in gathering required information and documentation.
3. Additional costs incurred by the TPA for the transition of existing medical care records and cases during the transition period must be quoted separately and should not be included in the annual fee quoted by the TPA. A detailed description of any such additional costs must be provided to Wilson County Schools.

BASE CONTRACT PRICING

It is Wilson County School's intention to contract with one TPA to provide all of the services outlined in this RFP. Wilson County Schools requires the TPA to assume full responsibility for coordinating and delivering the services outlined herein.

In establishing the price for this proposal, the TPA should not include any costs that will be incurred to provide the service outlined during the transition period. The TPA is required to list its charges for transition period services separately.

As part of the response to this section, the TPA must disclose all assumptions used in establishing its price. Such assumptions shall include, but are not limited to, the number, type and duration of injuries expected each year, the number of patient service visits expected, the number of claims expected to open and close under Workers' Compensation, a schedule of costs for all medical services, increase in costs for subsequent years, set up costs, etc.

Include details in identifying all fixed price costs. List any services that will be provided at an additional cost to the basic fee quote, and what the cost will be (e.g. field investigation, hearing representatives, bill audit, or other). Consider the following if applicable:

- Claims Administration
- Medical Care
- Physical Therapy and Rehabilitation costs
- DME Cost
- Prescription Cost
- IME Cost
- TPA Medical Coordinator
- Actuarial Report
- Drug and Alcohol Testing
- Nurse Case Management

Reminder: Proposals are due by **April 28, 2025**. The final decision will be announced on **May 19, 2025**.

For any questions, please contact:

Wendy Daniel – wendy.daniel@wilsonschoolsnc.net

Shannon Collina – shannon.collins@wilsonschoolsnc.net

We appreciate your interest and look forward to your submissions.