SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to utilize the first of four (4) renewal options with Marsh ClearSight, LLC fka CS Stars, LLC. Period of service is from October 1, 2016 through September 30, 2017. Total revised estimated annual expenditure in the amount of $475,000.00, for a not to exceed expenditure amount of $926,478.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #3 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Letter/Quote and Previous Awards

ANALYST _____ RESPECTFULLY SUBMITTED _____
ANNETTE BURNEY GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED_____ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

DEPARTMENT OF FINANCE

RISK MAMAGEMENT DIVISION

MEMORANDUM

DATE: September 1, 2016

TO: Gregory Pease, Chairperson, General Government Awards Committee

FROM: Mitchell Perin, CPA, CGFO, MBA, Financial & Administrative Manager

RE: Bid No. ESC-0358-15 for Risk Management & Claims Administration Information System, Exhibit E SOW #6 – Amendment 3

The current term for the contract 76610-05 with Marsh Clearsight, LLC, is from October 1, 2015 to September 30, 2016. Risk Management is exercising the first of four one-year renewal options for the period October 1, 2016 to September 30, 2017 with three one-year renewal options remaining. The maximum indebtedness to the City will be a not-to-exceed amount of $475,000.00 to a new maximum indebtedness of $926,478.00. The FY 17 fee for services October 1, 2016 to September 30, 2017, described in Exhibit "E" SOW # 6. All other terms and conditions shall remain the same.

Accordingly, it is requested that the City Contract No. 7661-05, with Marsh Clearsight, LLC, for services describe in Exhibit "E" Amendment 3 Statement of Work #6 for exercising the first of four one-year renewal options for the period October 1, 2016 to September 30, 2017 with three one-year renewal options remaining. (ii) Increase the maximum indebtedness to the City by a not-to-exceed amount of $475,000.00, to a new total maximum indebtedness of $926,478.00. All other terms and conditions remain the same.

Thank you for your consideration in this matter.

cc: ~~Alex Baker~~ Annette Burney

Attachments:
Exhibit E: SOW # 6

CLIENT NAME	CLIENT BILLING ADDRESS AND CONTACT INFORMATION
CITY OF JACKSONVILLE, FL	117 West Duval Street, Suite 335 Jacksonville, FL 32202
	CLIENT PURCHASE ORDER NUMBER OR OTHER REFERENCE:
STATEMENT OF WORK EFFECTIVE DATE	**STATEMENT OF WORK TERM**
1 October 2016	12 months
APPLICABLE MARSH CLEARSIGHT SOFTWARE AS A SERVICE AGREEMENT EFFECTIVE DATE	**APPLICABLE MARSH CLEARSIGHT SOFTWARE AS A SERVICE AGREEMENT EXPIRATION DATE**
1 October 2015	30 September 2017

DOES THIS STATEMENT OF WORK SUPPLEMENT A PRIOR STATEMENT OF WORK?			PRIOR STATEMENT OF WORK NUMBER	PRIOR STATEMENT OF WORK DATE
☐ YES	☒ NO	IF YES, THIS STATEMENT OF WORK SUPPLEMENTS THE STATEMENT OF WORK BETWEEN THE PARTIES WITH THE FOLLOWING NUMBER AND DATE:		

CLIENT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT	MARSH CLEARSIGHT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT
CITY OF JACKSONVILLE, FL	**Marsh ClearSight LLC**
Signature:	Signature:
Printed Name:	Printed Name:
Title:	Title:
Signature Date:	Signature Date:

FEES	CLIENT TOTAL	PAYMENT SCHEDULE	ADDITIONAL DETAILS
Annual Subscription Fee	**$449,500**	**Monthly**	**Billed in monthly installments, beginning on SOW#6 Effective Date**
CMS Section 111 Fee	**19,500**	**Monthly**	**Billed in monthly installments, beginning on SOW#6 Effective Date**
Transactional FeesTransactional FeesTransactional Fees	**6,000**	**Quarterly**	**Actual fees based on Clearinghouse reports detailing FROI and SROI transmissions**
Total Maximum Indebtedness for Initial Term	**$475,000**		**See Appendix A for Pricing Breakout**
Marsh ClearSight Client Conference Registration	**N/A**	**N/A**	**Two (2) registration fees are included in this SOW #6 for the Spring 2017 Conference. Client is responsible for all associated travel and expense.**

As required by Section 106.431, *Ordinance Code*, the maximum indebtedness of the City for the Initial Term of the Agreement, as set forth in this Statement of Work shall be $475,000: $444,500 as the License and Services fees for the Initial Term of this Statement of Work, as set forth above; $5,000 for travel expenses; $19,500 for the Medicare Section 111 Solution Option 1 annual fee and $6,000 for EDI transactional billings, provided, however, that (a) if it appears that said maximum indebtedness will be exceeded, the parties shall execute a written amendment accordingly and (b) until and unless the parties execute a written amendment to this Statement of Work, Marsh ClearSight will have no obligation to perform any Services that result in Fees in excess of the City's maximum indebtedness.

LICENSES & STORAGE	
General License(s):	43
Lite 1 User License(s):	0
Business Intelligence	3
Safety Audit License(s):	0
Incident/Audit Entry:	30 (concurrent) for : • The entry of Safety incidents and for the Driver Coordinators/Safety Representatives that will review those incidents • The entry of Workplace Injury incidents • The entry of Special Events Certificates
Incident/Audit-Anonymous:	0
Storage:	400 GB Additional storage may be purchased at a rate of $500 per gigabyte of storage.

SERVICES INCLUDED IN SUBSCRIPTION	
Training or On-site Assistance	
Locations(s):	None
Number of Sessions:	None
Service Hours per Session:	n/a
Set-Up and Support Services	
Scope:	Customer support and account management services solely related to maintenance and ongoing use (but not implementation) of the License Software described in this Statement of Work. Examples include, but are not limited to, service time spent on: user assistance with features, troubleshooting, issues management, stewardship and other meetings or teleconferences, account management, report configuration, data reconciliation, changes to existing workflows or system setup, changes to data conversions or changes to reports, technical assistance, creation of events and validations and maintenance of custom reports.
Annual Service Hours:	605. This includes the utilization of Marsh ClearSight Online Support Additional Service Hours purchased by Client after all Client Support Hours have been eroded will be billed as incurred at Marsh ClearSight's then-current rate at the time of the request.

LICENSED STAND-ALONE BUNDLES		
RISK	**SAFETY**	**CLAIMS**
☐ **Information Management**	☐ **Loss Control & Audit**	☐ **Claims Management**
☐ **Exposure Management**	☒ **Incident Management**	☒ **Claims Administration**
LICENSED ADD-ONS		
☐ **Insurance Management**	☒ **Workers Compensation**	☐ **Integrated Disability Management**

PRODUCT AND ADD-ON FUNCTIONS				
INCLUDED	**TO BE IMPLEMENTED**	**FUNCTIONS**	**QUANTITY/DESCRIPTION**	**ASSUMPTIONS**
		Base		
☐	☐	Assets Manager		
☒	☐	Claims Manager		

☒	☐	Contacts Manager		
☒	☐	Incident Manager		
☐	☐	Location Hierarchy		
☒	☐	Location Manager		
☒	☐	My ClearSight/Dashboards		
☒	☐	Notes/ Tasks		
☒	☐	Policy Manager		
☒	☐	Security Configuration		
☒	☐	Single Sign-on	Intake only	
☒	☐	Standard Reports		
		Advanced		
☒	☐	Business Intelligence		
☒	☐	Certificates of insurance (COI)		
☐	☐	Chargeback allocations		
☐	☐	Chargebacks (fees)		
☒	☐	CMS		
☒	☐	Custom Letters		
☐	☐	Employee Manager		
☒	☐	Events/Notifications		
☒	☐	FROI/SROI EDI (per state)	Florida only	
☒	☐	Indemnity Benefits		
☐	☐	Integrated Disability Management		
☐	☐	Interview Entry		
☒	☐	ISO® Indexing		
☐	☐	ISO Claim Search® OFAC Compliance Service Reporting		
☐	☐	OSHA Reporting		
☒	☐	Payment Processing	Export and request/voucher	
☐	☐	Policy Erosion		
☐	☐	Policy Program graphs		
☐	☐	Premium Allocation		
☒	☐	Reserve worksheet		
☐	☐	Risk Goggles		
☐	☐	Risk Identification		
☐	☐	Risk Map		
☐	☐	Audit		
☐	☐	Audit Action Plan user security		

		configuration		
☐	☐	Audit Assignments/Calendar		
☐	☐	Audit Dynamic Analysis		
☐	☐	Audit mobile/offline		
☒	☐	State Forms		
☐	☐	Table-based lookup		
☐	☐	Values Collection		
☐	☐	Web Services		
		Imports/Exports		
☐	☐	ACORD Incident Export		
☐	☐	Ad Hoc Export		
☒	☐	AP Export	FAMIS	
☐	☐	AP Import		
☒	☐	Attachment Loader	AmeriSys file attachments loaded weekly	
☒	☐	Check export		
☐	☐	Claim Web Service Intake Import		
☐	☐	Contact Attachment Import		
☐	☐	Employee Import		
☐	☐	Exchange Rate Import		
☐	☐	Generic Code Import		
☐	☐	Generic Lookup Import		
☐	☐	HL7		
☒	☐	HR Import		
☐	☐	IAIABC Incident Export		
☐	☐	Incident Import		
☒	☐	IRS 1099 Export		
☐	☐	Liberty WC Incident Export		
☐	☐	Links Import		
☐	☐	Location Import		
☒	☐	Medical Bill Review Import/Export (Claim Export, Contact Export, Bill Import, Paid File Export, Notes Export)	AmeriSys	
☐	☐	Multi-values Import		
☐	☐	Policy Import		
☐	☐	Positive Pay Export		

☐	☐	Premium Import		
☐	☐	Sedgwick Export		
☐	☐	First Notice Export		
☐	☐	The Network Incident Import		
☐	☐	Transaction Import		
☐	☐	User Import		
		Reports		
☒	☐	SI-17		

This Statement of Work (the "***SOW***") sets forth the terms generally applicable to the services provided by Marsh ClearSight LLC ("***Marsh ClearSight***") to the client named in this SOW (the "Client") under the Product and Services Schedules (the "***Schedules***") and Software as a Service Agreement entered into by Marsh ClearSight and Client and described in this SOW (the "***Agreement***"). Client will pay all applicable rates and fees for the Services set forth in the Schedules and the Agreement as set forth in this SOW, which is incorporated by reference therein. Applicable taxes are not included in amounts set forth in this Statement of Work. Travel and other expenses not set forth in this Statement of Work shall be billed as incurred. All Service Hours set forth in this SOW shall expire at the end of its current term. In the event all Service Hours are eroded, additional Service Hours may be purchased at reduced package rates or will be billed as incurred at current rates. During the term of the Agreement, this SOW may be renewed by the Client for four (4) successive one (1)-year periods in accordance with Section 6(a) of the Agreement The terms of the Agreement shall supersede any terms provided by Client unless mutually agreed in writing by both parties. Unless expressly indicated to supplement a prior Statement of Work or otherwise agreed in writing by the parties, this SOW shall supersede prior Statements of Work for the same Services. Fees stated in this Statement of Work have been agreed with Client based on the assumption that the information required for work to be performed is made available by Client and Client key personnel during the course of work. If delays or other unanticipated problems which are beyond Marsh ClearSight's control occur this may result in additional fees, which Marsh ClearSight will discuss with Client as soon as identified. Assumptions Marsh ClearSight has made that Marsh ClearSight deems critical to the process are set forth in the Agreement, Products and Services Schedule and this Statement of Work. Client will provide required resources to facilitate execution of all deliverables by the Marsh ClearSight team within the project schedule mutually agreed before the commencement of the project; this will include time from business users and source system owners for meetings, data requests, gathering of data required and most importantly help obtaining timely decisions from relevant parties.

Appendix A to Statement of Work #6: Pricing Breakout

Deliverable	Annual Fee
ANNUAL LICENSES	
Enterprise Edition Licenses and concurrent Interview Entry Licenses: • 43 Enterprise Edition Licenses • 30 concurrent Interview Entry ("Lite") licenses	$47,300 6,600 $53,900
A. SUBTOTAL: ANNUAL LICENSES	**$53,900**
ADVANCED FEATURES AND UNIVERSAL SOLUTIONS – ANNUAL FEES	
1099 Export	
Managed Care Service Provider interface (Import and Export; Notes export)	
AmeriSys interface	
Single Sign On	
Business Intelligence	
Certificate of Insurance Tracking	
Check Export	
Check Request/Voucher	
Document Loader (Managed Care Service Provider attachments)	
Electronic First and Subsequent Reports of Injury (FROI and SROI) for Florida	
FAMIS Export	
HR Import	
ISO Indexing Export	
State Forms (Florida) : excluding FROI and SROI	
B. SUBTOTAL: PRODUCT BUNDLES	**$108,120**

Deliverable	Annual Fee
CLEARSIGHT APPS – ANNUAL FEES	
Data Discovery	15,000
Intake	5,000
Return to Work	10,000
C. SUBTOTAL: CLEARSIGHT APPS	**$30,000**
ASP DATA STORAGE ANNUAL FEE	119,100
ANNUAL CLIENT SUPPORT • **580 Service Hours** • **Weekly Processing of AmeriSys Attachments**	 113,100 20,280 133,380
D. SUBTOTAL: DATA STORAGE AND CLIENT SUPPORT	**$252,480**
SUBTOTAL (A + B + C + D)	**$444,500**
TRAVEL AND EXPENSE(ANNUAL)	$5,000
D. TOTAL ANNUAL SUBSCRIPTION FEE (A + B + C + T&E)	**$449,500**
E. MEDICARE SECTION 111 SOLUTION **OPTION 1 ANNUAL FEE**	**$ 19,500**

Deliverable	Annual Fee
F. EDI Transactional Billings	$2.00 per EDI transaction sent and received from the State of Florida (not to exceed $6,000)
MAXIMUM INDEBTEDNESS FOR INITIAL TERM (D + E + F)	**$475,000**

CLIENT NAME	CLIENT BILLING ADDRESS AND CONTACT INFORMATION
CITY OF JACKSONVILLE, FL	117 West Duval Street, Suite 335 Jacksonville, FL 32202
	CLIENT PURCHASE ORDER NUMBER OR OTHER REFERENCE:
STATEMENT OF WORK EFFECTIVE DATE	**STATEMENT OF WORK TERM**
1 October 2016	12 months
APPLICABLE MARSH CLEARSIGHT SOFTWARE AS A SERVICE AGREEMENT EFFECTIVE DATE	**APPLICABLE MARSH CLEARSIGHT SOFTWARE AS A SERVICE AGREEMENT EXPIRATION DATE**
1 October 2015	30 September 2017

DOES THIS STATEMENT OF WORK SUPPLEMENT A PRIOR STATEMENT OF WORK?			PRIOR STATEMENT OF WORK NUMBER	PRIOR STATEMENT OF WORK DATE
☐ YES	☒ NO	IF YES, THIS STATEMENT OF WORK SUPPLEMENTS THE STATEMENT OF WORK BETWEEN THE PARTIES WITH THE FOLLOWING NUMBER AND DATE:		

CLIENT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT	MARSH CLEARSIGHT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT
CITY OF JACKSONVILLE, FL	**Marsh ClearSight LLC**
Signature:	Signature:
Printed Name:	Printed Name:
Title:	Title:
Signature Date:	Signature Date:

FEES	CLIENT TOTAL	PAYMENT SCHEDULE	ADDITIONAL DETAILS
Annual Subscription Fee	**$449,500**	**Monthly**	**Billed in monthly installments, beginning on SOW#6 Effective Date**
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Transactional FeesTransactional FeesTransactional Fees	**6,000**	**Quarterly**	**Actual fees based on Clearinghouse reports detailing FROI and SROI transmissions**
Total Maximum Indebtedness for Initial Term	**$475,000**		**See Appendix A for Pricing Breakout**
Marsh ClearSight Client Conference Registration	**N/A**	**N/A**	**Two (2) registration fees are included in this SOW #6 for the Spring 2017 Conference. Client is responsible for all associated travel and expense.**

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LICENSES & STORAGE	
General License(s):	43
Lite 1 User License(s):	0
Business Intelligence	3
Safety Audit License(s):	0
Incident/Audit Entry:	30 (concurrent) for : • The entry of Safety incidents and for the Driver Coordinators/Safety Representatives that will review those incidents • The entry of Workplace Injury incidents • The entry of Special Events Certificates
Incident/Audit-Anonymous:	0
Storage:	400 GB Additional storage may be purchased at a rate of $500 per gigabyte of storage.

SERVICES INCLUDED IN SUBSCRIPTION	
Training or On-site Assistance	
Locations(s):	None
Number of Sessions:	None
Service Hours per Session:	n/a
Set-Up and Support Services	
Scope:	Customer support and account management services solely related to maintenance and ongoing use (but not implementation) of the License Software described in this Statement of Work. Examples include, but are not limited to, service time spent on: user assistance with features, troubleshooting, issues management, stewardship and other meetings or teleconferences, account management, report configuration, data reconciliation, changes to existing workflows or system setup, changes to data conversions or changes to reports, technical assistance, creation of events and validations and maintenance of custom reports.
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RISK	**SAFETY**	**CLAIMS**
☐ **Information Management**	☐ **Loss Control & Audit**	☐ **Claims Management**
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LICENSED ADD-ONS		
☐ **Insurance Management**	☒ **Workers Compensation**	☐ **Integrated Disability Management**

PRODUCT AND ADD-ON FUNCTIONS				
INCLUDED	**TO BE IMPLEMENTED**	**FUNCTIONS**	**QUANTITY/DESCRIPTION**	**ASSUMPTIONS**
		Base		
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☒	☐	Policy Manager		
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☐	☐	Interview Entry		
☒	☐	ISO® Indexing		
☐	☐	ISO Claim Search® OFAC Compliance Service Reporting		
☐	☐	OSHA Reporting		
☒	☐	Payment Processing	Export and request/voucher	
☐	☐	Policy Erosion		
☐	☐	Policy Program graphs		
☐	☐	Premium Allocation		
☒	☐	Reserve worksheet		
☐	☐	Risk Goggles		
☐	☐	Risk Identification		
☐	☐	Risk Map		
☐	☐	Audit		
☐	☐	Audit Action Plan user security		

		configuration		
☐	☐	Audit Assignments/Calendar		
☐	☐	Audit Dynamic Analysis		
☐	☐	Audit mobile/offline		
☒	☐	State Forms		
☐	☐	Table-based lookup		
☐	☐	Values Collection		
☐	☐	Web Services		
		Imports/Exports		
☐	☐	ACORD Incident Export		
☐	☐	Ad Hoc Export		
☒	☐	AP Export	FAMIS	
☐	☐	AP Import		
☒	☐	Attachment Loader	AmeriSys file attachments loaded weekly	
☒	☐	Check export		
☐	☐	Claim Web Service Intake Import		
☐	☐	Contact Attachment Import		
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This Statement of Work (the "***SOW***") sets forth the terms generally applicable to the services provided by Marsh ClearSight LLC ("***Marsh ClearSight***") to the client named in this SOW (the "Client") under the Product and Services Schedules (the "***Schedules***") and Software as a Service Agreement entered into by Marsh ClearSight and Client and described in this SOW (the "***Agreement***"). Client will pay all applicable rates and fees for the Services set forth in the Schedules and the Agreement as set forth in this SOW, which is incorporated by reference therein. Applicable taxes are not included in amounts set forth in this Statement of Work. Travel and other expenses not set forth in this Statement of Work shall be billed as incurred. All Service Hours set forth in this SOW shall expire at the end of its current term. In the event all Service Hours are eroded, additional Service Hours may be purchased at reduced package rates or will be billed as incurred at current rates. During the term of the Agreement, this SOW may be renewed by the Client for four (4) successive one (1)-year periods in accordance with Section 6(a) of the Agreement The terms of the Agreement shall supersede any terms provided by Client unless mutually agreed in writing by both parties. Unless expressly indicated to supplement a prior Statement of Work or otherwise agreed in writing by the parties, this SOW shall supersede prior Statements of Work for the same Services. Fees stated in this Statement of Work have been agreed with Client based on the assumption that the information required for work to be performed is made available by Client and Client key personnel during the course of work. If delays or other unanticipated problems which are beyond Marsh ClearSight's control occur this may result in additional fees, which Marsh ClearSight will discuss with Client as soon as identified. Assumptions Marsh ClearSight has made that Marsh ClearSight deems critical to the process are set forth in the Agreement, Products and Services Schedule and this Statement of Work. Client will provide required resources to facilitate execution of all deliverables by the Marsh ClearSight team within the project schedule mutually agreed before the commencement of the project; this will include time from business users and source system owners for meetings, data requests, gathering of data required and most importantly help obtaining timely decisions from relevant parties.

Appendix A to Statement of Work #6: Pricing Breakout

Deliverable	Annual Fee
ANNUAL LICENSES	
Enterprise Edition Licenses and concurrent Interview Entry Licenses: • 43 Enterprise Edition Licenses • 30 concurrent Interview Entry ("Lite") licenses	$47,300 6,600 $53,900
A. SUBTOTAL: ANNUAL LICENSES	**$53,900**
ADVANCED FEATURES AND UNIVERSAL SOLUTIONS – ANNUAL FEES	
1099 Export	
Managed Care Service Provider interface (Import and Export; Notes export)	
AmeriSys interface	
Single Sign On	
Business Intelligence	
Certificate of Insurance Tracking	
Check Export	
Check Request/Voucher	
Document Loader (Managed Care Service Provider attachments)	
Electronic First and Subsequent Reports of Injury (FROI and SROI) for Florida	
FAMIS Export	
HR Import	
ISO Indexing Export	
State Forms (Florida) : excluding FROI and SROI	
B. SUBTOTAL: PRODUCT BUNDLES	**$108,120**

Deliverable	Annual Fee
CLEARSIGHT APPS – ANNUAL FEES	
Data Discovery	15,000
Intake	5,000
Return to Work	10,000
C. SUBTOTAL: CLEARSIGHT APPS	**$30,000**
ASP DATA STORAGE ANNUAL FEE	119,100
ANNUAL CLIENT SUPPORT • **580 Service Hours** • **Weekly Processing of AmeriSys Attachments**	 113,100 20,280 133,380
D. SUBTOTAL: DATA STORAGE AND CLIENT SUPPORT	**$252,480**
SUBTOTAL (A + B + C + D)	**$444,500**
TRAVEL AND EXPENSE(ANNUAL)	$5,000
D. TOTAL ANNUAL SUBSCRIPTION FEE (A + B + C + T&E)	**$449,500**
E. MEDICARE SECTION 111 SOLUTION **OPTION 1 ANNUAL FEE**	**$ 19,500**

Deliverable	Annual Fee
F. EDI TRANSACTIONAL BILLINGS	$2.00 per EDI transaction sent and received from the State of Florida (not to exceed $6,000)
MAXIMUM INDEBTEDNESS FOR INITIAL TERM (D + E + F)	**$475,000**

Pending Approval

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award with Marsh ClearSight, LLC fka CS Stars, LLC for additional services as outlined in the attached exhibits in the amount of $53,895.00 through the initial period ending September 30, 2016. Total revised not to exceed expenditure in the amount of $451,478.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #2 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Quote and Previous Awards

ANALYST _____ RESPECTFULLY SUBMITTED _____
ANNETTE BURNEY GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

---

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: 31 NUMBER RECEIVED: 8 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award with Marsh ClearSight, LLC fka CS Stars, LLC to add the implementation of the Claims Management Ultimate Edition and the Incident Management Standard Edition to the Risk Management & Claims Administration System for a five (5) month term in the amount of $32,583.00. The period of service for the implementation will expire September 30, 2016. Total revised not to exceed expenditure in the amount of $397,583.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #1 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Quote and Previous Awards

BUYER ANNETTE BURNEY RESPECTFULLY SUBMITTED GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: TWANE DUCKWORTH, CHIEF, RISK MANAGEMENT

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING ____ DATE: 4/7/16

OTHER: ____

Sam E. Mousa
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of:
Executive Order No. 2015-05

ACTION OF AWARDING AUTHORITY DATE 4/07/16

APPROVED ✓ DISAPPROVED: ____

OTHER: ____

SIGNATURE OF AUTHENTICATION ____

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: 31 NUMBER RECEIVED: 8 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Demonstrations were held on January 30, 2015 with the top ranked firms as approved on the award dated January 22, 2015.

Recommend approval of award to the highest ranked firm, CS Stars, LLC as a result of scoring based on demonstration evaluation criteria. As a result of the awarded contractor being the incumbent, there will be no transition phase cost to the City for the implementation (Item # 1) as the current contract does not expire until 9/30/2015. The base project cost will be in the amount not-to-exceed $365,000.00 (Item # 2) for the new contract that will commence October 1, 2015, to be executed by formal contract thru the Office of General Council.

Attachments: Recommendation Memo, Attachment B1 Evaluation Matrix and Scoring Sheet and Previous Award

BUYER _____ RESPECTFULLY SUBMITTED _____

for ANNETTE BURNEY

GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: TWANE DUCKWORTH, CHIEF, RISK MANAGEMENT

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING ____ DATE: 02/05/15

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 2/4/15

APPROVED _____ DISAPPROVED: Cleveland Ferguson III
Deputy Chief Administrative Officer
For: Mayor Alvin Brown
Under Authority of:
Executive Order No. 2015-01

OTHER: _____

SIGNATURE OF AUTHENTICATION _____