



**Purchasing Department**

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*The Washington Elementary School District is committed to achieving excellence for every child, every day, every opportunity.*

**AMENDMENT NO. THREE (#3)  
BID #20.014  
ACTUARIAL SERVICE FOR WORKERS, COMPENSATION  
AND CASUALTY TRUSTS**

Submittal Due Date: Thursday, June 11, 2020 at 2:00 PM Local Time

This Amendment supplements and amends the original BID and shall be taken into account in submittals. The Offeror must take careful note of this Amendment.

**Offeror should submit a signed copy of this Amendment to the Washington School District Purchasing Department prior to the submittal due date and time, preferably with your properly marked BID package. It may also be submitted in a separate sealed envelope, plainly marked with the BID number and title (Apparel, Accessories & Apparel Blanks).**

\_\_\_\_\_  
COMPANY NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

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**This BID is amended as follows:**

1. What firm is currently providing these services to the District? Willis Towers Watson
2. How long has the current firm been providing these services? 10+ years
3. Is it possible to obtain a copy of the current firm's latest report? Attached
4. What were the last annual fees paid to the current firm? \$15,000.00 per year
5. Will the claim data be available in electronic form, preferably as an Excel spreadsheet? Yes
6. What is the date of the oldest outstanding claim in the District's database? Workers Compensation is 2/24/1995
7. Does the analysis of the workers' compensation claims need to determine separate indications for indemnity, medical and expense claims or one overall estimate by year? Separate indications for indemnity, medical and expense claims
8. Is any allocation of the overall reserve indication(s) to department or on any other basis required? Insurance Department not sure what it means
9. Is the reserve analysis expected to be conducted on an annual basis or more frequently? Annual Basis
10. Will any firm that submits questions receive responses to all questions submitted by any firm? On our website

**Questions Regarding Specific Items in the RFP:**

11. Page 18, Item B – why are you requiring Automobile Insurance, since the scope of this project does not involve the use of an automobile? It does require the use of an automobile if awarded contractor is required to attend a Trust Board.

12. Page 18, Item E and Page 19, Item F – How do we determine whether coverage for Technology/Network E&O and Cyber Liability Insurance are “applicable in the performance of the contract?” Almost any activity these days requires use of a computer, and potential transmission of data from one entity to another via a network. If the awarded firm is transmitting data into our network.
13. Page 19, Item G – Is a Fidelity Bond required for this project? The services requested do not appear to involve risks that would normally be covered by such a bond. No
14. Page 21, Item 12.3.1 – This section requires the contractor to submit requests for price increases between 90 and 60 days prior to the renewal date. Page 23, Item 17.1, states that the term of the contract will be for one year, and Page 26, Item 7, states that the contract “can be extended if funding is available.” However, the cost proposal page requires price quotes for each year of a five-year period. In light of these requirements, does the District require proposed pricing for each of the five years, and will the successful firm be required to adhere to the submitted prices, regardless of any subsequent events? The District will only review price/cost increases during the renewal period, only a catastrophic event could alter this timeline. The District must have funding available in order to renew.
15. Page 25, Item 1 – What lines of business are included in the Casualty Trust? Are separate analyses required for each of these lines of business? It is not necessary for actuary to separately analyze line of coverage within the Casualty Trust, an overall analysis is requested. Of course, the Workers Compensation is a separate analysis.
16. Page 25, Item 1 – How many years of future funding of losses are required? Two years
17. Page 25, Item 1 – The District may request a “mini” annual review; however, the Price Quote page lists a line for the proposed price for such a review. In order to be able to accurately price such work, how does the scope of such a mini-review differ from the scope of the work requested under this RFP? **The Mimi-annual review would be at the discretion of the Trust, they have not requested one in the past**
18. Page 25, Item 1 – This section states that the analysis is designed to cover the 2020 -2021 period. Page 26, Item 7, states that the contract will run from July 1, 2020 through June 30, 2021. Page 31, first paragraph, states that the work should be completed by May 1, 2021. This appears to allow for approximately 10 months to complete the work. When will the data for the analysis be available? In August or September
19. Page 30, Item 17 – What is meant by the phrase “positive efforts shall be made to involve minority and small businesses.” Does this refer to efforts by the District or by the proposer? This type of work does not explicitly lend itself to performance by such businesses, since the work must be performed by a credentialed actuary. This is a requirement if Federal Funds are utilized and is strictly boiler plate information, no Federal Funds will be used on this contract.
20. Page 32, Item C – Are the meetings described in this section to be held in the District’s offices, or can they be done by teleconference? If the former, are we permitted to include travel and other out of pocket expenses in our cost proposal? How many meetings are anticipated during a single calendar year? One meeting per year, Actuary participated telephonically.
21. Page 33 – There is no listing for the contents of Tab 3 of the proposal – is this intended to be the price proposal? My mistake put cost sheet in tab 4
22. Page 34 – This is the Cost Proposal page, but there are no instructions on how this page should be included in the proposal. Is it supposed to be separately bound? In a separate envelope from the technical portion of the submission? Should it be a separate file on the thumb drive? My mistake put cost sheet in tab 4
23. Page 34 – There is a section for pricing for “Multiple Assignment Price”, however, this phrase appears nowhere else in the RFP. What is meant by this term? Is this intended to represent the cost of conducting analyses of both the Workers’ Compensation and Casualty Trusts? If so, is there any scoring advantage to proposing a lower price for performing both analyses than the sum of the individual price quotes? In other words, will scoring be done separately for each Trust as well as for the two Trusts combined? Trust combines

24. Page 39 – Will any firm that submits questions receive notice of any published amendments to this RFP? They will be posted on the website
25. Page 50 – Will the District keep a copy of the Vendor Registration Form on file so that we can receive any future RFP's in our area, or do we need to submit a separate copy of the form in order to be included in your system? Yes

Sincerely

**Brian Wenrich**

**Sr. Buyer**

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