

*[SAMPLE * - DRAFT]*

RETIREMENT SYSTEM

REQUEST FOR PROPOSALS

RE: MEDICAL DIRECTOR

A. OVERVIEW

The Board of Trustees of the Retirement System (“Board”) is vested with the authority and fiduciary responsibility for the administration, management and operation of the Retirement System. The purpose of this Request for Proposal (RFP) is to outline the Board's requirements for its Medical Director and solicit proposals from which the Board may evaluate such services.

B. PLAN PROFILE

The Retirement System (“Retirement System”) consists of approximately _____ active and _____ retired members and has assets of over _____ Million Dollars.

C. MINIMUM QUALIFICATIONS

The requires that all prospective Medical Directors have strong credentials, be licensed certified physician(s), and be a member of the Michigan Association of Public Employee Retirement Systems.

D. SCOPE OF SERVICES

The Medical Director shall:

1. Be directly responsible to the Board.
2. Arrange for and pass upon all medical examinations required under the provisions of the Retirement System.
3. Investigate all essential statements and certificates of a medical nature by or on behalf of a member, or other claimant, in connection with any application for disability retirement, or death in line of duty benefits.
4. Report in writing to the Board conclusions and recommendations.
5. Attend meetings and be available to address Board questions from time to time.
6. Provide all required services within reasonable fee levels.

When responding to the attached Request for Proposal, the Board encourages you to describe the ways in which you believe your service capability is special or distinctive.

E. SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposal be organized in the following manner:

1. Title Page:

Please indicate the RFP subject, the name of your organization, address, telephone number, name of contact person and date.

2. Table of Contents:

Clearly identify the material by section and page number.

3. Letter of Transmittal:

Limit to one or two pages.

a. Briefly state your organization's understanding of the nature of the work.

b. Give the names of the persons who will be authorized to make presentations for your organization, their titles, addresses, and telephone numbers.

4. Submission:

The Board requests that a total number of ____ (**) complete sets of your proposal be submitted.

Proposals must be presented in a sealed envelope clearly marked as follows:

RFP: Medical Director
[ADDRESS]

Your response to this RFP must be received at the above address by 5:00 p.m. on _____, 200__.

All inquiries about the RFP should be in writing and brought to the attention of _____ at the address above.

MEDICAL DIRECTOR SERVICES REQUEST FOR PROPOSAL

ORGANIZATION BACKGROUND

1. Please provide a list of physicians, their specialties and curriculum vitae.
2. Where are your offices located?
3. Where are examinations/evaluations conducted?
4. Do you have any hospital affiliations (i.e., staff physician, teacher, etc.)?
5. Do you or your affiliated physicians treat patients?
6. Please note any relevant Board certifications, awards, professional recognitions.
7. Please list any research or publications in particular field.
8. What medical equipment do you utilize in your evaluation?
9. How do you typically handle requests for an independent medical examination/evaluation? Please provide comment on: (a) who coordinates scheduling of appointments; (a) upon notification, how soon are appointments typically scheduled; (c) how are physicians assigned; (d) who determines what physician or specialist conducts the evaluation; (e) how much time is generally allocated for an evaluation; (f) who obtains the patient's medical history, job description, medical records, etc; (g) who reviews the patient's records; (h) what information do you require to issue a report; (i) what type of ancillary testing is conducted, if applicable; (j) how soon after an examination/evaluation is a written report completed and provided to the Board of Trustees.
10. Do you have any educational programs or seminars?
11. How do you maintain independence or monitor conflicts of interest?
12. How many public retirement systems accounts do you service?

FEES

13. Please describe in detail your fees and costs.
14. Please provide an estimate of your annual fees.
15. What costs are involved in implementing your program?
16. Describe the various types of insurance and indemnification provided to protect clients of service(s) proposed, including (Be sure to include specific dollar coverages):

Errors and Omissions Coverage
Risk Coverage
Carriers
Levels
Limits
Deductibles

REFERENCES

17. Please provide the names, contacts, and phone numbers of Retirement System clients who will share with the Board their first-hand experiences regarding your services (preferably public retirement systems).

MISCELLANEOUS

18. Is your company a member of MAPERS? What other affiliations does your company maintain to keep apprised of unique issues and developments affecting public employee retirement systems?
19. Has your company or its employees been investigated by any state or federal regulatory or law enforcement agency in the last ten years? If yes, please describe in detail the substance and results of each such investigation.
20. Has your company or its employees been a party to any lawsuit, including suits involving misfeasance or professional negligence, within the last ten years? If so, please describe the substance and results of each suit.
21. Please describe the transition process when taking on a new client. Please discuss computer systems and data issues.

OTHER REQUIREMENTS

22. Pre-Qualification: Inviting a proposal does not assume a "pre-qualification" of any proposer.

23. Proposal Preparation Cost: The Board will not be liable for any costs incurred in preparation of proposals.
24. Certification as to "Request for Proposal" Content: By submitting a proposal, the proposer certifies that he/she has fully read and understands the "Request for Proposal" and has full knowledge of the scope, nature, quantity, and quality of work to be performed. Unless specified to the contrary, submitting a proposal will be interpreted as agreement to all provisions in and requirements of the RFP.
25. Additional Information and Instruction: The Proposer shall furnish such additional information as the Board may reasonably require. The Board reserves the right to investigate the qualifications of all proposers as it deems appropriate.
26. Negotiations: The Board reserves the right to conduct pre-contract negotiations with any or all proposers.
27. Proposal Rejection: The Board reserves the right to reject any or all proposals, the right in its sole discretion to accept the proposal which it considers most favorable to the Board's interest, and the right to waive minor irregularities in the procedures. The Board further reserves the right to seek new proposals when such a procedure is in its best interest.
28. Proposals Binding for 90 Days: All proposals submitted shall be binding for ninety (90) calendar days following the above due date for receipt of proposals to allow for evaluation and award of contract.
29. Late Proposals: Proposals received by the Board after the time specified for proposal opening will not be considered.
30. Completeness: All information required by the Request for Proposal shall be supplied to constitute an acceptable proposal. Failure to submit a complete proposal may result in the disqualification of your proposal.

The Board appreciates the time and effort you will have expended in responding to this RFP. Regardless of the outcome, the Board will be pleased to share with you its specific comments regarding the competitiveness of your RFP response.

** IMPORTANT NOTE:* This information is provided to assist retirement systems in the retention of professional advisers and to facilitate the efficient and effective fulfillment of due diligence. This sample draft is presented for illustration purposes and should be modified to meet the specific needs and requirements of a retirement system. This information should not be considered the rendering of legal, accounting, or other professional services and should not be used as a substitute for consultation with professional advisers.