
MUNICIPAL EMPLOYEES' ANNUITY AND BENEFIT FUND OF CHICAGO

A Pension Trust Fund of the City of Chicago

Request for Proposal:

Medical Services

Revised September 15, 2017

I. OVERVIEW

The Municipal Employees' Annuity and Benefit Fund of Chicago (the "Fund" or "MEABF") hereby issues a request for proposals ("RFP") from qualified medical groups that provide diagnostic and medical file review of active members of the Fund who apply for disability benefits or apply for the extension of disability benefits after one year of disability coverage from the Fund. The Medical Services Provider submitting a proposal shall be referred to as a "Respondent" or "Group".

All forms needed for submitting a response to this RFP are available on the Fund's website at: <http://www.meabf.org>. **Respondents to this RFP are responsible for monitoring the Fund's website for information pertaining to the RFP while the RFP is outstanding.**

The MEABF is a defined benefit, single employer benefit plan that was established in 1921 by an act of the Illinois General Assembly to provide disability and retirement benefits to qualified employees of the City of Chicago and the Chicago Board of Education (Plan Sponsor). The governing law for the Fund is located in the Illinois Compiled Statutes (40 ILCS 5/ Articles 1, 8 and 20). The sole purpose of the Fund is to pay benefits to its members, which are funded through a combination of member contributions, contributions of the Plan Sponsor, and investment earnings. The Fund is overseen by a five-member Board of Trustees (the "Board"). As of 12/31/16, Fund membership was approximately 71,915. The MEABF is a component unit of the City of Chicago, and as such, is included in the City of Chicago's financial statements as a pension trust fund.

Annually, the Fund provides approximately \$12 million in disability benefit payments to approximately 400 members on a monthly basis.

The Fund Medical Services Provider is appointed by the Board of Trustees and is responsible for reviewing medical records and providing physical evaluations of members requesting disability payments from the Fund in accordance with the requirements in 40 ILCS 5/8-162. The Fund Medical Services Provider attends monthly Retirement Board Meetings and certifies the accuracy of disability requests.

II. RFP Timeline

1. Date of Issue: August 16, 2017
2. Final Responses Due: October 31, 2017
3. Review, Selection & Negotiation: November 1 – December 15, 2017
4. Proposed Approval by Board: January 21, 2018

The timeline is subject to change. Any changes to the timeline will be communicated to all known Respondents and posted on the Fund's website.

III. MEABF RFP PROCEDURES

The Fund will post notice of the RFP on its website. Neither this RFP nor any response to this RFP should be construed as a legal offer.

All interested Respondents must submit their responses in accordance with the proposal submission instructions below. The MEABF reserves the right to reject any or all proposals submitted. All material submitted in response to the RFP will become the property of the Fund. The MEABF is not responsible for any costs incurred by the Respondents in responding to this RFP.

If it becomes necessary to revise any part of the RFP, or if additional information is necessary for a clarification of provisions within this RFP, prior to the due date for proposals, a supplement will be provided to all known Respondents and posted on the Fund's website. If a supplement is necessary, the Fund may extend the due date to accommodate any additional requirements.

Respondents are advised that proposal materials are subject to the Illinois Freedom of Information Act (5 ILCS 140). After completion of the RFP, selection by the Fund and successful negotiation of a contract, if any, proposals submitted may be viewed and copied by any member of the public, including news agencies and competitors. Respondents claiming a statutory exception from the Illinois Freedom of Information Act for information within the Respondents' proposals must identify relevant language as confidential, and identify in the email transmission of the proposal whether confidential information is included. Further, each page of confidential documentation must be labeled as such. The Respondent must also specify which statutory exemption applies for each piece of confidential information. The Freedom of Information Act can be found at the Illinois General Assembly's website (<http://www.ilga.gov/>). The MEABF reserves the right to make determinations of confidentiality. If the MEABF disagrees with a Respondent's confidential designation, it may either reject the proposal or discuss its interpretation of the exemptions with the Respondent. If agreement can be reached, the proposal will be considered. If agreement cannot be reached, the MEABF will remove the proposal from consideration.

The Fund's staff and legal counsel shall open the responses and review each for content, quality and compliance with the RFP's requirements. Following the review, the field of candidates will be narrowed to a smaller list of the most qualified Respondents. The Fund's staff reserves the

right to meet with representatives of each Respondent to obtain an independent assessment of the Respondent's capabilities.

Following the comprehensive review process, Fund staff shall recommend finalists to the Board. The Board shall accept or modify the recommendation. The finalists may be asked to appear before the Board to present the Groups' qualifications. If satisfied with the capabilities of one or more respondents, the Board will make a final selection.

Once proposals have been submitted to the Fund staff, ex parte communications between the Fund's staff and interested parties, including Respondents, or non-interested parties, shall be prohibited until a final decision is made. Notwithstanding the prior sentence, the Fund's staff may communicate with a particular Respondent for the sole purpose of gaining clarification regarding information provided in response to this RFP. Furthermore, any communication related to this RFP between a Respondent and any member of the Board (the "decision makers") is prohibited until the Fund's final decision regarding the search is posted on the Fund's website (a so-called "quiet period").

IV. PROPOSAL SUBMISSION

The Fund's Executive Director shall oversee the RFP process. If a Medical Group is interested in submitting a proposal, it must submit an electronic copy of the complete proposal by **4:00 PM, CST on October 31, 2017** to searches@meabf.org.

SEARCH CONTACT: Jim Mohler
Executive Director
Municipal Employees' Annuity and Benefit Fund of Chicago
321 N. Clark Street, Room 700
Chicago, Illinois 60654

If the Fund's staff has questions regarding how to interpret a Respondent's proposal, the Fund's staff is authorized to request additional information from that Respondent.

PROPOSALS MUST CONTAIN THE FOLLOWING DOCUMENTS:

1. **Transmittal Letter.** A transmittal letter must be submitted on the Respondent's official business letterhead. The letter must identify all documents provided in response to the RFP, and must be signed by an individual authorized to bind the Respondent contractually. An unsigned proposal shall be rejected. The letter must also contain the following:
 - A. The name and address of any entity that is a parent of or owns a controlling interest in the Group. Statement that the proposal is being made without fraud or collusion; that the Respondent has not offered/received any finder's fees, inducements or any other form of remuneration, monetary or non-monetary, to/from any individual or entity relating to the RFP, the Respondent's proposal or the Fund's selection.

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- B. An acknowledgement by the Respondent that the proposal is a firm and irrevocable offer good for one (1) year from the date of the proposal.
 - C. Statement that identifies any conflicts of interest, specifically, disclose any current business relationship or any current negotiations for prospective business with the Fund, the Fund's Executive Director, or any member of the Board or proxy acting on a Board member's behalf.
 - D. A statement that the Group is willing and able to perform the services described in the Scope of Services section of this RFP.
 - E. A statement that the Group has available the staff and other resources required to perform all services required by the RFP and to provide all required deliverables.
 - F. The name, title or position, e-mail address, and telephone number of the individual signing the transmittal letter on behalf of the Group.
2. Historical summary of the Group.
 3. Resumes and licenses of key personnel that will be assigned to the account.
 4. Sample list of other clients. Provide references and contact information.
 5. Indicate any legal action against the Medical Group within the last 5 years.
 6. Indicate complaints against your personnel that have been leveled by a professional board or other regulatory authority, if any. Indicate any corrective actions that have been taken by the Group with respect to these people.
 7. Describe how the Group will approach the review of member medical files and perform required examinations within the scope of medical expertise required of various ailments which necessitate disability approval. Also discuss the Group's use of technology with respect to sending/receiving requested information from the Fund staff. And finally, discuss the communication process used by the Group to discuss issues with the Fund staff and the Board.
 8. Set forth your fee proposal for the 2018 Medical Services, including, attendance at Board meetings and in-person physical examinations of disabled members and any additional costs that would be incurred based on the proposed scope of services. Proposal should include a single price estimate, and/or a range with a not to exceed amount. Please identify services that are priced based on the totality of the service or estimated time and materials. Include any guarantees that can be given regarding increases in future years.
 9. Describe how and why the Group is different from other firms being considered, and why our selection of the Medical group as MEABF's Medical Services Provider is in the best interest of the Fund.
 10. Any other information you would like us to consider.

V. SCOPE OF SERVICES

The Respondent will be considered for the following services:

1. Preparation and presentation of monthly requests for disability benefits
2. Annual physical examination of members requesting disability extensions

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3. Routine consultation with the Staff Benefits Manager and Executive Director
 4. Advice on any changes of procedure with respect to granting disability benefits, maintaining membership disability files or streamlining services
 5. Monthly attendance at Board meetings
 6. Periodic testimony regarding member requests
 7. Any other matters within the Board's responsibilities

VI. AWARD CRITERIA

Award will be considered to Respondent whose proposal is responsive, is considered the best of those submitted (without consideration of price), and with whom the Fund is able to negotiate a fair agreement and reasonable fee structure.

The Executive Director shall determine how well the proposal meets the review criteria. The Executive Director shall present to the Board a summary of **all** responsive Respondents and an analysis on the most qualified Respondents regarding key aspects identified below:

1. Completeness and Quality of Proposal
2. Organization
3. Key Personnel
4. Product and Process
5. Fees

The Fund will attempt to negotiate a fair agreement and reasonable fee structure with the awarded Respondent. If the Fund is unable to do so, the Fund reserves the right to award and negotiate with the next most qualified Respondent. The Fund shall consider the offer, including the Respondent's qualifications, reputation, fees, and other relevant factors, in negotiating a fair agreement and reasonable fee structure.

Thank you for your interest in this RFP and the MEABF looks forward to your response.