



PROCUREMENT

3501 CIVIC CENTER DRIVE, SAN RAFAEL, CA 94903

DATE: August 28, 2026

SUBJECT: Questions and Answers for Request for Proposals (RFP) #2880 - General Liability Third Party Administrator Services

1. **QUESTION:** Do you have the breakdown of estimated new claims and/or open claims by type? Bodily Injury, Property, Professional liability/completed operations.
Answer: The loss run attached at the end of this document includes the available claim information, including cause of loss and claim descriptions, which proposers may use to assess the nature of the claims.
2. **QUESTION:** Can the County please provide a 5-year loss run to assist with TRISTAR submitting an accurately priced proposal?
Answer: See Answer #1.
3. **QUESTION:** The last page of the RFP indicates that a sample contract is “on the next page” but there is no page. Can the County please provide the mentioned sample contract?
Answer: The Sample Professional Service Contract (PSC) has been provided in Addendum 1, issued on August 20, 2026 on Bid Express and County’s Contracting Opportunities websites.
4. **QUESTION:** Can the County please confirm the current TPAs staffing model?
 - a. What is the County’s preferred staffing model? For example, dedicated versus designated staffing.**Answer:** The County is open to a blended approach of designated and dedicated staffing. The County currently has the following staffing model:

<u>Position</u>	<u>Staffing Model</u>
Supervisor	Designated
Claims Examiner	Designated
Subrogation Examiner	Designated
Senior Claims Examiner	Dedicated

5. **QUESTION:** Why is the County looking to make a change in TPAs?
Answer: The County is conducting a competitive procurement to ensure it receives the highest quality claims administration services, leverage current industry best practices, and evaluate available technologies and service offerings. The issuance of this RFP does not reflect dissatisfaction with the current provider but is part of the County's standard procurement process.
6. **QUESTION:** May we receive a 5-year loss run that includes all open and closed liability claims – by type of claim (GL, AL, EPL, Vehicle Physical Damage), and incidents?
Answer: See Answer #1.

7. QUESTION: How many open claims have been rejected and are still pending the expiration of the 6-month statute of limitations?
Answer: Approximately 30.
8. QUESTION: Please confirm if your claim counts are by occurrence vs. by individual claimants.
Answer: Claim counts provided in this RFP are by occurrence rather than by individual claimant.
9. QUESTION: How many 1st Party Subrogation claims were reported in the last fiscal year, and how many subrogation claims are currently open?
Answer: There are 5 that were reported and still open
10. QUESTION: In 2025, what was the frequency of Emergency Field Investigation occurrences conducted by the Agency to date?
Answer: Emergency field investigations are infrequent and are initiated based on the circumstances of the loss. During calendar year 2025, the County conducted 1 emergency field investigations.
11. QUESTION: Is it anticipated that file reviews will be in person or via video conference? How frequently will file reviews occur?
Answer: The County anticipates that file reviews may be conducted either in person or via video conference, depending on operational needs. Currently they are via video conference. The anticipated frequency is quarterly, although additional reviews may be requested as needed.
12. QUESTION: Who is your insurance broker?
Answer: The County's insurance brokers are USI and Alliant Insurance Services, Inc.
13. QUESTION: Will the TPA adjust to just SIR or to total value?
Answer: The successful proposer will be expected to adjust claims to their full estimated exposure while recognizing the County's applicable self-insured retention and excess insurance reporting requirements.
14. QUESTION: What claims system is currently in place?
Answer: The County's current TPA utilizes our existing TPA's system, filehandler, as its claims management system.
15. QUESTION: May we see the current TPA contract?
Answer: The current agreement is attached.
16. QUESTION: Does the Agency have paper files in need of scanning or destruction?
Answer: There are no paper files.
17. QUESTION: To what degree would the TPA be responsible for retaining, managing, and directing outside special counsel?
Answer: The TPA will be responsible for coordinating with defense counsel, monitoring litigation activity, managing litigation expenses. The County retains authority regarding counsel selection, litigation strategy, settlement authority, and other significant litigation decisions.
18. QUESTION: Will the TPA be responsible for field investigations/inspections?
Answer: No.
19. QUESTION: How many small claims filings against the Agency have occurred in the last 5 years? Can you provide a list of these broken down by year? How many of these were attended by the TPA?
Answer: Two and the TPA did not attend these.

20. QUESTION: We have submitted an application for a County of Marin business license; however, the County has indicated the process may take up to several weeks, extending beyond the proposal submission deadline of 9/4. Please advise:
(1) would proof of a pending application (confirmation of submission and payment) satisfy this requirement pending issuance, or is a fully issued license required at the time of submission; and
(2) alternatively, would a valid business license from another jurisdiction where the proposer operates, such as the City of Sausalito, satisfy this requirement?
Answer: Yes, evidence of a pending business license with the County of Marin will be accepted. The required business license must be in place at the start of the contract.

21. QUESTION: Does the Non-Collusion Declaration require notary with the proposal submission?
Answer: The Non-Collusion Declaration form must be completed and included with a proposal, but the form is not required to be notarized.

22. QUESTION: Page 7 states:

5. Data Transition

- a. Proposers must include a County-approved transition plan covering transfer of all open and closed files, financial transactions, reserves, diaries, litigation information, documents, images, payment history, coding, notes, and electronic data.
- b. Proposer must include in their plan validation of migrated data through reconciliation reports and certify that no records, deadlines, payments, or diary entries were lost or altered.

1. How is that the County would pre-approve a proposed transition plan?
2. How would we include a plan validation of migrated data for the County?
3. Or are both these requirements meant for after we have been assigned the Contract?

Answer: The inclusion of "county approved" was a mistake. Proposers should omit the statement "County approved" from the request.

23. QUESTION: Please provide a 5-year Loss run

Answer: See Answer #1.

24. QUESTION: What is the average number of open claims?

Answer: The attached loss run reflects the current number of open and closed claims as of the date it was generated, from which proposers may determine the current open claim inventory.

25. QUESTION: What is the average number of open litigated claims?

Answer: There are currently 44 open litigated claims.

26. QUESTION: What percentage of claims become litigated?

Answer: On average 23%.

27. QUESTION: Does the County provide guidelines for handling/reporting on litigated claims?

Answer: Yes. The successful proposer will be expected to comply with the County's claims handling procedures, litigation reporting requirements, settlement authority thresholds, and excess insurer reporting requirements. Additional guidance will be provided during implementation.

28. QUESTION: Is there a chance that litigated claims would be handled by outside defense panel counsel and if so, whom?

Answer: Litigated matters are rarely assigned to outside defense counsel. When the cases are referred out, counsel is selected by the County based on the nature and complexity of the claim. The County maintains a panel of qualified defense firms and reserves the right to select counsel for each matter. The successful proposer will be expected to work collaboratively with assigned defense counsel and County staff throughout the litigation process.

Additional Attachments included: Loss and Claim Report, Initial TPA Contract and Current TPA Contract