

Review of Proposals
RFP 5-3964 Claims Administration of the Self-Insured Workers' Compensation Program
Presented to Finance and Administration Committee - August 27, 2025
5 proposals were received, 2 firms were non-responsive, 3 firms were interviewed, 1 firm is being recommended.

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Total Firm-Fixed Price
1	86	Pacific Secured Equities, doing business as Intercare Holdings Insurance Services, Inc. Orange, California	WS Law, APC Law Offices of Jodie P. Filkins Allied Universal Lexitas Platinum Court Reporters Macro Pro TCS Risk Management Services Shaw HR Consulting InterMed Ancillary Services Optum Examworks Compliance Solutions	Specialized in providing workers' compensation claims administration services since 1994 with over 600 employees. More than 70 percent of Intercare's clients are public entities. Currently serves multiple California transit agencies, including the San Francisco Municipal Transportation Agency, Riverside Transit Agency, Sacramento Regional Transit, and Big Blue Bus. Demonstrated a strong understanding of OCTA's internal systems, claims philosophy, and program expectations. Proposed team includes claims supervisor with over 25 years of experience, and dedicated claims adjusters and assistant with tenures ranging from one to nine years. Proposed seamless continuity of service from Orange office with no disruption to current operations. Interview responses clearly demonstrated knowledge of regulations, workflows, and performance monitoring. Detailed work plan included monthly in-person base meetings, quarterly audits, clinic coordination, and strategic claim resolution. Value-added services included Official Disability Guidelines predictive analytics, Zoom for recorded statements, and benchmarking tools. Positive references.	\$2,794,000.00
2	83	Athens Insurance Service, Inc., doing business as Athens Administrators Concord, California	One Call Cadence RX Unisource Discovery Accuro Solutions	Privately held firm founded in 1976 with approximately 600 employees. Sixty percent of clients are public agencies, including the Bay Area Rapid Transit, Long Beach Transit, and Golden Gate Bridge Authority. Proposed division manager with over 20 years of experience. Emphasized staffing continuity and reported a 98.7 percent client retention rate. Committed to seeking OCTA's approval prior to replacing key personnel. Did not identify specific individuals for key day-to-day roles. Interview responses lacked clarity regarding onboarding timelines and staffing readiness. Proposed proprietary JARVIS platform with injured worker dashboards, alerts, predictive modeling, and automated messaging. Work plan lacked measurable performance indicators and did not fully address internal audit processes or clinic collaboration. Some interview questions regarding integration and operational specifics were not fully addressed. Positive references.	\$2,763,690.00
3	78	CorVel Enterprise Claims, Inc. Irvine, California	LegalNet, Inc. Allied Universal P&S Netwok Physician Based Medical Management Risk Consultants of America CVS Caremark Akeso Macro Pro Lexitas WS Law, APC Law Offices of Jodie Filkins	Founded in 1987, currently serving over 200 municipalities and public agencies. Operates 75 offices nationwide and delivers all claims and managed care services in-house using proprietary CareMC platform. Emphasized financial stability and scalability; zero debt reported. Staffing plan listed several key positions as "to be determined." No contingency plan provided for pending hires; interview confirmed hiring in progress without clear timelines. Proposed work plan included predictive modeling, nurse triage, and digital portal for injured workers. Lacked sufficient detail on customization of tools and integration with OCTA systems. Centralized service model raised concerns regarding flexibility and responsiveness to OCTA's localized operational needs. Interview responses did not clearly address succession planning or OCTA-specific onboarding strategy. Positive references.	\$2,660,755.00

Evaluation Panel:

Internal:

Contracts Administration and Materials Management (1)

Risk Management (1)

Health, Safety and Environmental Compliance (1)

External:

City of Huntington Beach (1)

Los Angeles County Metropolitan Transportation Authority (1)

Proposal Criteria

Qualifications of the Firm

Staff and Project Organization

Work Plan

Cost and Price

Weight Factors

20%

25%

30%

25%