



The Retirement Board of the  
**Policemen's Annuity and Benefit Fund of Chicago**

221 North LaSalle St – Suite 1626, Chicago, IL 60601  
(312) 744-3891 [www.chipabf.org](http://www.chipabf.org)

## **Request for Proposal (RFP)**

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## **MEDICAL ADVISOR SERVICES**

**Released January 3, 2022**

The Retirement Board of the Policemen’s Annuity and Benefit Fund of Chicago  
**DRAFT Request for Proposal**  
**Medical Advisor Services**  
**Important Dates**

Release Date	<b>January 3, 2022</b>
Proposal Due Date	<b>March 4, 2022</b> (4:00 p.m. CST)
RFP Administrator	Justin Kugler, Fund Counsel Email: <a href="mailto:jkugler@chipabf.org">jkugler@chipabf.org</a>
Questions	Must be emailed to the Request for Proposal (RFP) Administrator by 4:00 p.m. CST on <b>February 4, 2022</b> .
Responses	Responses to all questions will be posted on the Fund’s website: <a href="https://chipabf.org">https://chipabf.org</a> by 4:00 p.m. CST on <b>February 11, 2022</b> .
Official RFP Notices/Addendum	All requirements are specified in this RFP to ensure no respondent is provided advantage over another. Any changes to the requirements will be posted as an addendum to the RFP on the Fund’s website, <a href="http://www.chipabf.org">www.chipabf.org</a> . Proposers are solely responsible for monitoring the website and adhering to RFP notices/addendums.
Prohibited Communication	Respondents are prohibited from communicating with Board members or staff, other than the RFP Administrator, concerning this RFP or the resulting contract from the RFP release date until a contract for these services is fully executed.

## **I. OVERVIEW**

The Policemen's Annuity and Benefit Fund of Chicago ("PABF" or the "Fund") is a defined benefit, single employer benefit plan established by the Illinois General Assembly to provide retirement, survivors, and disability benefits to sworn members of the Chicago Police Department ("CPD"), their spouses, and children. Currently, the Fund serves over 12,000 active members, over 14,000 retiree and widow annuitants, and approximately 200 officers receiving disability benefits. The Fund is administered by an eight-member Board of Trustees ("Board"). The Board includes three elected police officers (consisting of one Police Officer, one Sergeant and one Lieutenant), one elected annuitant and four Mayoral appointees.

The Board is responsible for the overall management and operation of the Fund. One of the Board's duties is to review all applications submitted by CPD employees seeking an ordinary, duty or occupational disease disability benefit under Article 5 of the Illinois Pension Code, 40 ILCS 5/5-101 *et seq.* ("Pension Code") which can be found at [www.ilga.gov](http://www.ilga.gov). The Fund intends to engage the services of highly qualified and highly reputable occupational medicine provider to serve as the Fund's independent medical advisor ("medical advisor"). This medical advisor will furnish occupational health services, including but not limited to, medical evaluations in disability related matters in accordance with the provisions of the Pension Code.

Under the Fund's current practice, the medical advisor reviews the medical files of active Fund members who apply for disability benefits from the Fund and performs annual medical evaluations of members who are receiving disability benefits. In addition, the medical advisor may perform independent medical exams of members applying for or in receipt of disability benefits.

The Board will consider a broad range of candidates and actively consider minority, female, and disadvantaged business enterprises that are qualified to provide occupational medicine services. The Board reserves the right to reject any and all proposals submitted. In addition to the requested documentation, the Board may request a formal presentation from the prospective medical advisor candidates. All proposals will be evaluated by members of the Board, Fund staff and its attorneys. The award of the contract to the selected medical advisor(s) is subject to final approval by the Board.

## **II. BACKGROUND**

PABF receives approximately 30-40 new applications each year for disability benefits from Chicago Police Officers who are active members of the Fund. Active members are eligible to apply for duty, occupational or ordinary disability benefits after they have exhausted their CPD medical time and CPD has removed the member from its payroll due to a medical leave of absence. After PABF receives a member's application and CPD medical records, the Fund staff schedules the member for an Independent Medical Examination (IME). After the IME is completed, the applicant appears before the Board for a hearing on his or her disability application. The medical advisor reviews the member's medical records prior to the disability hearing, attends the hearing, and advises the Board on any medical questions related to the applicant's medical file and IME.

The Fund has approximately 200 active members currently receiving disability benefits. Members who are receiving disability benefits from the Fund are statutorily required to have an annual medical exam with the Fund's medical advisor. During the exam, the medical advisor assesses the member's progress and determines if the member remains disabled as defined by the Pension Code.

The Board expects the responding medical advisors ("Respondents") will respond to the RFP assuming the process will continue operate in this way. However, the Board is willing to consider an alternative process of disability review and evaluation and encourages Respondents to offer an additional proposal based on their expertise.

### III. MINIMUM REQUIREMENTS

- A. The Respondent should have at least three (3) years of experience providing disability medical evaluation services, as independent medical evaluators, for the purposes of evaluating disability applicants.
- B. The medical advisor(s) assigned to the PABF account shall have a minimum of three years of experience advising employers or public retirement systems on disability-related issues.
- C. The medical advisor(s) must be an active, licensed, practicing physician, licensed with the Medical Board of the State of Illinois and certified in occupational medicine services.

The responding medical advisor(s) may be a solo practitioner or affiliated with a group, provided that each physician within the group is a graduate of an accredited school of medicine, holds a current license from the Illinois State Licensing Board to practice medicine and has at least three (3) years of experience practicing medicine.

### IV. SCOPE OF SERVICES

The medical advisor(s) will be expected to utilize the essential job descriptions, supplied by the CPD, to determine an applicant's ability to perform his or her assigned duties. In order to determine whether to grant or deny a disability application, the Board must carefully examine and weigh the medical evidence presented by each applicant. In order to assist the Board in making such determinations, the selected medical advisor(s) will be required to provide medical opinions based on existing medical records, independent medical evaluations from other physicians and his or her own medical examination when needed.

In your response, you will need to specify your ability to provide the services listed below. If you cannot provide a particular service, please indicate the reason. During the contractual period, the Respondent will be expected to provide a full range of occupational medicine services, both required and "Ad Hoc," including but not limited to:

#### A. Pre-examination services

Provide pre-examination services to assess the medical information provided by Fund staff regarding each applicant's claim for disability. These services shall include but not be limited to reviewing the applicant's claimed disability(ies), as described on their disability application, plus all medical records obtained from various sources. After reviewing all relevant records, the Respondent may advise Fund staff as to the medical specialty(ies) most applicable to evaluating the applicant's claimed disability(ies).

#### B. Annual Independent Medical Exams

Conduct yearly IMEs of officers receiving disability benefits to assess their continuing disability(ies) as required by the Pension Code. The medical evaluations are brief physical examinations directed at whether the officer meets the criteria established by the CPD for an officer to return to active duty as a police officer.

#### C. Consultation

Provide medical advice and sworn testimony concerning applicant's IMEs, medical records and other treatments related to the claimed disability(ies). Provide specialized medical reports to the Board regarding an applicant or recipient's ability to perform his or her assigned duties. In this role, the Respondent has no operational power or responsibility to make any decision as to an officer's initial or continuing eligibility for a disability pension, or their return to duty. The medical advisor's function is limited to advising the Board as to the medical evidence for the officer's disability. In addition, the medical advisor will be expected to attend the Fund's monthly meetings.

## V. TIME REQUIREMENTS

### Proposal Calendar

Request for proposals issued	<b>January 3, 2022</b>
Due date for proposals	<b>March 4, 2022</b>
Oral presentations (by invitation)	TBD – if necessary

### Notification and Contract Dates (tentative)

Selected firm notified	<b>May 2, 2022</b>
Contract completed	<b>June 1, 2022</b>

## VI. PABF RFP PROCEDURES

The Fund will post notice of the RFP on its website <https://chipabf.org/>. Neither this RFP nor any response to this RFP should be construed as a legal offer.

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

If, prior to the due date, the RFP is revised or additional information is provided, then an addendum will be provided to all known Respondents and posted on the Fund's website. If an addendum is necessary, the Fund may extend the due date.

Respondents are advised that proposal materials are subject to the Illinois Freedom of Information Act, 5 ILCS 140, *et seq.* ("FOIA"), which can be found [here](#). 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 exemption under FOIA 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 Fund reserves the right to make determinations of confidentiality. If the Fund disagrees with a Respondent's confidential designation, it may either reject the proposal or discuss its interpretation of the exemption(s) with the Respondent. If agreement can be reached, the proposal will be considered. If agreement cannot be reached, then the Fund will not consider the proposal.

The Fund's staff shall open the responses and review each for content, quality, and compliance with the RFP's requirements. Following the review, the Fund may narrow the field of Respondents. Finalists may be asked to present their qualifications before the Board. If satisfied with the capabilities of one or more Respondents, the Board will make a final selection.

### **Quiet Period**

A quiet period will be in effect during the entire RFP process. The quiet period will begin when the RFP is issued and will end when the Board declares the process complete. The purpose of the quiet period is to ensure that all prospective medical advisors have equal access to all information regarding the search objective and to ensure that communications with prospective medical advisors are consistent and accurate in order to make the search process as efficient and fair as possible.

During the quiet period, a prospective Respondent, its agents, officers, and employees may not contact any member of the Board or Fund administrative staff directly or indirectly pertaining to the RFP. Notwithstanding, the Fund's RFP

Administrator and Counsel Justin Kugler, 312-676-0408 or [jkugler@chipabf.org](mailto:jkugler@chipabf.org) may communicate with a particular Respondent for the sole purpose of gaining clarification regarding information provided in response to this RFP. Similarly, all members of the Board and Fund administrative staff will refrain from communicating directly or indirectly with prospective Respondents regarding this RFP. During the quiet period, it shall be the sole responsibility of the prospective medical advisor to visit the Fund's website periodically for information regarding this RFP.

Respondents may send written questions concerning the RFP via e-mail to the Justin Kugler by 4:00 p.m. CST on **February 4, 2022**. Responses to properly submitted questions will be consolidated in a single Q & A document and posted on the Fund's website by 4:00 p.m. CST on **February 11, 2022**. The source of the questions will not be disclosed.

## VII. PROPOSAL SUBMISSION

Fund Counsel shall oversee the RFP process. Respondents must submit electronic copies of their responses by 4:00 p.m. CST on **March 4, 2022**, by emailing them to:

**SEARCH CONTACT:** Justin Kugler  
Fund Counsel  
[jkugler@chipabf.org](mailto:jkugler@chipabf.org)

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. In addition, the Fund will not consider any proposal that is either incomplete or received after 4:00 p.m. CST on **March 4, 2022**.

## VIII. ALL 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 contractually bind the Respondent. 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 Respondent organization.
  - B. A 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.
  - C. 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.
  - D. A statement that identifies any conflicts of interest, specifically, disclose any current business relationship with the Fund or any member of the Board.
  - E. A statement that the Respondent is willing and able to perform the services described in the Scope of Services section of this RFP.
  - F. A statement that the Respondent has available the staff and other resources required to perform all services required by the RFP and to provide all required deliverables.
  - G. The name, title or position, e-mail address, and telephone number of the individual signing the transmittal letter on behalf of the Respondent.
2. Provide a description of the Respondent's organizational structure, its history, number of years it has been in business, its practice areas and any other related information the Respondent deems appropriate.
3. Resumes and licenses of key personnel who will be assigned to the Fund account.
4. Sample list of other employer or public pension fund clients. Provide three (3) references and contact information.
5. Indicate any legal action against the Respondent within the last five (5) years.

6. Identify all complaints filed against your personnel by a professional board or other regulatory authority within the last five (5) years. Indicate all corrective actions taken in response to all such complaints.
7. Describe how the Respondent will approach the review of member medical files and perform required examinations within the scope of medical expertise required of various ailments that necessitate disability approval. Also discuss the Respondent's use of technology with respect to sending/receiving requested information from the Fund staff. Finally, discuss Respondent's proposed process for communicating with the Fund staff and the Board.
8. Describe any experience providing medical evaluation and/or medical treatment of police officers.
9. The Respondent's fee schedule for reviewing medical records, conducting physical examinations (both in-person and telemedicine), and attending monthly Board meetings. Please also identify any additional costs the group would reasonably expect to incur based on the proposed scope of services. The 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.
10. Explain why the Board should select the Respondent to serve as PABF's medical advisor.
11. Certificates of insurance for the Respondent's general liability and malpractice insurance coverage.
12. Any other information you would like the Board to consider.

## **IX. Award Criteria**

Award will be considered to the Respondent whose proposal is responsive, is considered the best of those submitted, and with whom the Fund is able to negotiate a fair agreement and reasonable fee structure.

Fund counsel and staff shall determine how well the proposal meets the review criteria. Fund counsel and staff 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. 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.

An electronic copy of your proposal, in a pdf format, must be received by PABF by 4:00 p.m. CST on **March 4, 2022**. The proposers bear sole responsibility for ensuring that their proposals are delivered on time. To be eligible for consideration, the completed proposal, must be delivered by the deadline to:

Justin Kugler, Fund Counsel

Email for electronic delivery: [jkugler@chipabf.org](mailto:jkugler@chipabf.org)