



Award Recommendation Letter

Date: September 6, 2024

To: Erin Kellam, Deputy Commissioner, Indiana Department of Administration *EJK 9/6/24*

From: Arthur L. Sample IV, Procurement Specialist, Indiana Department of Administration

Subject: Recommendation of Selection for **RFP 70-25-79025, Third party administrator services for Worker's Compensation and Disability plans**

Based on its evaluation of response to RFP 70-25-79025, it is the evaluation team's recommendation that **ONB Benefits Administration, LLC, (JWF Specialty)** be selected to begin contract negotiations to administer the Indiana State Personnel Department (INSPD)

ONB Benefits Administration, LLC, (JWF Specialty) has committed to subcontract the specified percent of the contract value to the vendors listed below:

- 1. 1.1% to **BPTS LLC** (a certified Minority-owned Business (MBE)).

The details of this recommendation are included in this letter.

Estimated 5-year Contract Value: \$5,571,625.00

The evaluation team received one (1) proposal from:

- ONB Benefits Administration, LLC, (JWF Specialty)

The Proposal was evaluated by SPD and IDOA according to the following criteria established in the RFP:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	40
3. Cost (Cost Proposal)	40
4. Buy Indiana	5
5. Minority Business Enterprise Subcontractor Commitment	5 (1 bonus pt. available)
6. Women Business Enterprise Subcontractor Commitment	5 (1 bonus pt. available)
7. Indiana Veteran Owned Small Business Enterprise Subcontractor Commitment	5 (1 bonus pt. available)
Total:	100 (103 if bonus awarded)

The Proposal was evaluated according to the process outlined in Section 3.2 ("Evaluation Criteria") of the RFP. Scoring was completed as follows:

A. Adherence to Requirements

Each proposal was reviewed for responsiveness and adherence to mandatory requirements. The proposal was deemed responsive and adhered to the mandatory requirements.

B. Management Assessment/Quality: Initial Scoring

The Respondent's Proposal was evaluated based on their respective Business Proposal and Technical Proposal.

Business Proposal

For the Business Proposal evaluation, the evaluation team considered the information the Respondent provided in the Business Proposal. These areas were reviewed to assess the Respondent’s ability to serve the State:

- Respondent Information and Financial Stability
- Diversity, Equity, and Inclusion Information, References, and Experience Serving Similar Clients
- Contract Terms/Clauses

Technical Proposal

For the Technical Proposal evaluation, the evaluation team considered the Respondent’s proposal in the following areas:

Worker’s Compensation

- Network
- Cost Management
- Claim Administration
- Account Services & Education
- Legal

Disability

- Network
- Cost Management
- Claims Administration
- Account Services & Education
- Legal

The evaluation team’s initial scoring is based on a review of the Respondent’s proposed approaches to each section of the Business Proposal and Technical Proposal. The initial results of the Management Assessment/Quality Evaluation are shown below:

Table 1: Initial Management Assessment/Quality Scores

Respondent	MAQ Score 40 pts.
ONB Benefits Administration, LLC, (JWF Specialty)	30.67

C. Cost Proposal (40 Points)

The price points on the Respondent’s Costs were awarded as follows:

Score = {

- If Respondent’s Cost amount is lowest among all Respondents, then score is 40.
- If Respondent’s Cost amount is NOT lowest among all Respondents, then score is:

$$40 * \frac{(\text{Lowest Respondent's Cost Amount})}{(\text{Respondent's Cost Amount})}$$

The cost scoring as a result of the Respondent’s cost Proposal is as follows:

Table 2: Initial Cost Scores

Respondent	Cost Score 40 pts.
ONB Benefits Administration, LLC, (JWF Specialty)	40.00

D. Combined MAQ and Cost Scores

The MAQ and Cost Combined Scoring as a result of the Respondent's business, technical, and cost Proposal is as follows:

Table 3: Round 1 – Total Scores (MAQ + Cost)

Respondent	Total Score 80 pts.
ONB Benefits Administration, LLC, (JWF Specialty)	70.67

E. Clarifications

Score was finalized and remained unchanged after the clarification.

Table 4: Round 2 – Management Assessment/Quality Scores

Respondent	MAQ Score 40 pts.
ONB Benefits Administration, LLC, (JWF Specialty)	30.67

F. Best and Final Offer Opportunity – Final Round Cost Scores

The Respondent's score was reviewed and re-evaluated based on the BAFO response.

The cost scoring as a result of the Respondent's BAFO Cost Proposal is as follows:

Table 5: Round 2 – BAFO Cost Scores

Respondent	Cost Score 40 pts.
ONB Benefits Administration, LLC, (JWF Specialty)	40.00

G. Round 2 - Total Scores

The combined final scores for the Respondent, based on Round 2 Management Assessment/Quality and BAFO Cost Scores are listed below.

Table 6: Round 2 - Evaluation Scores

Respondent	MAQ Score	Cost Score	Total Score
Points Possible	40	40	80
ONB Benefits Administration, LLC, (JWF Specialty)	30.67	40.00	70.67

H. IDOA Scoring

IDOA scored the Respondent in the following areas: MBE Subcontractor Commitment (5 points + 1 available bonus point), WBE Subcontractor Commitment (5 points + 1 available bonus point), IVOSB Subcontractor Commitment (5 points + 1 available bonus point) and Buy Indiana (5 points) using the criteria outlined in the RFP. IDOA requested updated M/WBE and IVOSB commitments from the Respondent who submitted BAFO Cost Proposal. Once the final M/WBE and IVOSB forms were received from the Respondent, the total scores out of 100 possible points were tabulated and are as follows:

Table 7: Final Evaluation Scores

Respondent	MAQ Score	Cost Score	Buy Indiana*	MBE*	WBE*	IVOSB*	Total Score
				5 (+1 bonus pt.)	5 (+1 bonus pt.)	5 (+1 bonus pt.)	100 (+3 bonus pt.)
Points Possible	40	40	5				
ONB Benefits Administration, LLC, (JWF Specialty)	30.67	40.00	0.00	0.63	-1.00	-1.00	69.29

Award Summary

During the course of evaluation, the State scrutinized the proposal to determine the viability to meet the goals of the program and the needs of the State. The team evaluated the proposal based on the stipulated criteria outlined in the RFP document.

The term of the contract shall be for a period of five (5) years from the date of contract execution. There may be up to three (3) renewals for a total of eight (8) years at the State's option.

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