



Department of Purchasing
100 N. Main Street, 2nd Floor
Suffolk, VA 23434
(757) 925-6762

December 8, 2025

To All Interested Parties:

Subject: RFP 1888-P, Third Party Claims Administration and Related Services w/the Option to Provide Excess Workers' Comp Insurance Coverage

The Suffolk City School Board (School Board) is requesting proposals from interested parties to Provide Third Party Claims Administration and Related Services with the option to provide Excess Workers' Comp Insurance coverage. Please read carefully, all information contained in the RFP document. Proposals may be submitted through the eVA portal or delivered in a sealed envelope or package **clearly marked with RFP 1888-P, TPA and Related Services** on or before **2:00 p.m. Thursday January 15, 2026**. Proposers may use the USPS at their own risk. The post office box is only checked once daily. Any late proposal shall be returned to the proposer and not evaluated. Proposals not sent through eVA must be delivered to:

Linda Bates, NIGP-CPP, VCO, VCA
Suffolk Public Schools
Department of Purchasing
100 North Main Street, 2nd Floor
Suffolk, Virginia 23434

Proposals will not be accepted at any other location. Any proposal received after the time designated above will be returned unopened. Nothing herein is intended to exclude any responsible Offeror or in any way restrain or restrict competition. All responsible Offerors are encouraged to submit proposals. The School Board plans to select a qualified offeror based on the requirements set forth herein and pursuant to the Commonwealth of Virginia Procurement Regulations. The awarding authority for this contract is the Suffolk City School Board. The School Board reserves the right to reject any or all proposals submitted or take advantage of any available regional or state contracts. **Any questions concerning this Request for Proposal shall be submitted in writing to Barbara Valentine with McNeary Consulting Services at Barbara_Valentine@ajg.com or Laurie Eubank at laurie_eubank@ajg.com and cc: lindabates@spsk12.net by 12:00 pm on Wednesday January 07, 2026.** Questions will be answered in the form of addenda which will be posted on eVA and the Suffolk Public Schools website, and will become a part of the contract.

Issued By:

Linda Bates, NIGP-CPP, VCO, VCA
Coordinator of Purchasing

Enclosures

CONTENTS

The cover letter (Request for Proposal) and each section attached as listed below constitute this Request for Proposal. All potential Offerors will be required to adhere to all requirements, schedules, terms and conditions as set forth in these sections.

SECTION I Scope of Services

SECTION II Proposal Requirements

SECTION III Evaluation Criteria

SECTION IV Selection of Offeror

SECTION V Terms and Conditions

EXHIBIT I Contractor/Employee Background Certification

EXHIBIT II TPA Offeror Response For

EXHIBIT III Workers' Compensation Excess Offeror Response Form

EXHIBIT IV Employee Census / Information

EXHIBIT V Workers' Compensation History and Miscellaneous Information

EXHIBIT VI Approved Panel of Physicians

EXHIBIT VII Claim Count and Supporting Loss Information

SECTION I SCOPE OF SERVICES

The purpose of this RFP is to establish a term contract for Third Party Claims Administration (TPA) and Related Services w/the Option to Provide Workers' Comp Excess Liability. Vendors responding to this request for proposal must be responsible offerors, regularly and practically engaged in providing requested services specified herein. Our current contract will expire June 30, 2026.

General Requirements:

Third Party Claims Administration Services

Describe in detail your firm's intent and methodologies to provide the specified services and demonstrate the requested qualifications using Exhibit II-Offeree Response Form. **Exhibit II must be completed and returned as a part of the proposal for consideration.**

Workers' Compensation Excess Insurance

Indicate your firm's response to each item addressed on Exhibit III-Offeree Response Form. **Exhibit III must be completed and returned as a part of the proposal for consideration of Workers' Comp Excess Insurance**

SECTION II PROPOSAL REQUIREMENTS

Proposals shall be as thorough and detailed as possible to indicate the Offeror's abilities to provide the services specified and to assist in evaluation of the proposals. All items below are required to be completed and included with the proposals submitted.

1. Provide a letter of introduction that includes the name and location of the company, a statement of interest and that shows the ability of the offeror to provide the required services. The letter must also include the following non-collusion statement.

"The Offeror expressly warrants that the information submitted herein is not the result of an agreement, expressed or implied, with any other Offeror or Offerors in an attempt to influence or restrict competition.

The letter of introduction shall be signed by an individual authorized to conduct business for the firm with the name of the individual typed below the signature. The telephone number, business address and email address must be included in the letter of introduction.

2. Provide a list of five references that have utilized services/coverage proposed, preferably K-12 education, then higher education, municipal, and commercial. Include name of organization, contact name, phone number, email address and length of time providing service for each reference. The School Board may contact references to inquire about their satisfaction with services provided.
3. Complete Offeror Response Form, Exhibits II and III and return with your proposal.

SECTION III EVALUATION CRITERIA

Each firm will be evaluated on the detail, quality and content of their proposal. The proposal shall be clear, factual and contain information necessary for a clear comparison of individual programs and proposed services. Each proposal will be evaluated on the basis of the criteria listed below:

1. Responsiveness to the purpose and scope of services
2. Completeness and clarity of the proposal
3. Quality of implementation of services and support
4. Qualification of the firm and its ability to provide the required coverage and services
5. Qualifications of individuals providing required services
6. Quality of references
7. Cost

The School Board will use a 1-5 evaluation scoring process for each of these items, with one being the lowest available and 5 being the highest.

SECTION IV SELECTION OF OFFEROR

1. The School Board will use the competitive negotiation process (as outlined in the Virginia Public Procurement Act) in selecting the Offerors to provide this service. The proposal, as submitted, will be evaluated by the School Board. Due to the school division be closed, selected vendors deemed as best suited and qualified may be selected for further evaluation including the use of various electronic methods or additional questionnaires . The School Board reserves the right to ask clarifying questions throughout this process. Furthermore, our consultant, listed in the RFP, will be empowered to ask and receive questions to be able to provide guidance to the School Board during the evaluation process. **Competitive negotiations will be conducted with the top ranked Offerors.** A contract will be awarded to the top ranked Offeror(s) after the completion of competitive negotiations.
2. If the School Board determines that only one Offeror is fully qualified or that one Offeror is clearly more highly qualified and suitable than the others under consideration, a contract may be negotiated and awarded to that Offeror.
3. The School Board reserves the right to award multiple contracts as may be most advantageous to the School Board.
4. The School Board reserves the right to negotiate the terms of this contract on an annual basis in order to maintain a fair market value and to take advantage of any technological advances during the life of the contract.

5. The School Board reserves the right to reject any or all proposals and will not be liable for any cost incurred in connection with the preparation and submittal for this Request for Proposals.
6. Notice of Award for this solicitation shall be in writing to the Successful Offeror(s) and posted on the Suffolk Public Schools Bid Board at 100 N. Main Street, Second Floor, Suffolk, VA 23434 and on the Purchasing Department website.
7. The School Board and its representatives reserves the right to negotiate all aspects of this contract and negotiate a contract that best meets the needs of Suffolk Public Schools.

SECTION V TERMS AND CONDITIONS

1. **Independent Contractor Relations:** Neither the Successful Offeror, its employees, assignees or Successful Offerors shall be deemed employees of the School Board while performing for the School Board.
2. **General Provisions:** Nothing in the agreement shall be construed as authority for either party to make commitments which will bind the other party beyond the scope of services contained herein.
3. **Inventions and Copyrights:** The Successful Offeror is prohibited from copyrighting any papers, interim reports, forms or other material and/or obtaining patents on any invention resulting from its performance of the project, except when specific written authorization of the School Board is given. The copyright or patent shall belong to the School Board.
4. **Terms of Agreement:** The initial term of this agreement shall begin on July 1, 2026 and continue through June 30, 2027 after which, this agreement may be automatically extended for four additional one year periods, beginning July 1st and ending June 30th of each year, unless otherwise terminated by either party by giving written notice March 31st of each year. Price for the initial term of this agreement shall be negotiated as a part of this solicitation. The School Board may approve a price increase for each subsequent year but the cost increases shall not exceed the Consumer Price Index (CPI) as developed by the Bureau of Labor Statistics, U. S. Department of Labor, for all Urban Consumers (CPI U) South, for the preceding calendar year. The School Board reserves the right to extend this contract for additional time during the re-solicitation process should it be in the best interest of the School Board.
5. **Termination:** The School Board Offeror may terminate the Agreement upon ninety (90) days written notice to the other party. Upon this termination for convenience, the Successful Offeror shall be paid only for those additional fees and expenses incurred between notification of termination and the effective date of termination that are necessary for curtailment of its work under the Agreement. The parties may mutually agree in writing to an earlier termination.

In the event of a breach by the Successful Offeror of the agreement, the School Board shall have the right to immediately rescind, revoke, or terminate the Agreement. In the alternative, the School Board may give written notice to the Successful Offeror by specifying the manner in which the Agreement has been breached. If a notice of breach is given and the Successful Offeror has not substantially corrected the breach within ten (10) days of receipt of the written notice, the School Board shall have the right to terminate the Agreement. A waiver of breach of any provision of the Agreement shall not be deemed to be a waiver of any other or subsequent breach and shall not be construed to be a modification of the terms of the Agreement. A violation of any state or federal law or regulation by the Successful Offeror shall be considered a breach of the Agreement.

In the event of rescission, revocation, or termination, all documents and other materials related to the

performance of the Agreement shall become the property of the School Board.

This agreement shall be canceled automatically in the event that the local, state or federal government fails to appropriate or allocate sufficient funds or positions for the purpose of continuing the Agreement. This termination shall be complete upon depletion of the previously allocated funds.

6. **Collateral Contracts:** Where there exists any inconsistency between the Agreement and other provisions of collateral contractual Agreements which are made a part of the Agreement by reference or otherwise, the provisions of the Agreement shall control.
7. **Nondiscrimination:** In its performance of the Agreement, the Successful Offeror warrants that it will not discriminate against any employee, or other person, on account of race, color, sex, religious creed, ancestry, age, disability or national origin.

The Successful Offeror shall post, in conspicuous places that are available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause. In its solicitations or advertisements for employees, whether placed by or on behalf of the Successful Offeror, the Successful Offeror shall state that it is an equal opportunity employer. Notices, advertisements and solicitations which conform to federal laws, rules or regulations shall be deemed sufficient for the purpose of meeting the requirements of this section.

Suffolk Public Schools does not discriminate against faith-based organizations.

8. **Drug Free Workplace:** A drug-free workplace is to be maintained by the contractor. All public bodies shall include in every contract over \$10,000 the following provisions:

During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000.00, so that provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

9. **Contractor/Employee Background Certification:** Upon award, the contractor and any employee who will have direct contact with students shall provide certification that (i) he has not been convicted of a felony or any offense involving the sexual molestation or physical or sexual abuse or rape of a child; and (ii) whether he has been convicted of a crime of moral turpitude. Any person making a materially false statement regarding such offense shall be guilty of a Class 1 misdemeanor and, upon conviction, the fact of such conviction shall be grounds for the revocation of the contract to provide such services and, when relevant, the revocation of any license required to provide such services. (See Exhibit I)
10. **Applicable Laws:** The Agreement shall be governed in all respects, whether as to validity, construction, capacity, performance or otherwise, by the laws of the Commonwealth of Virginia.

11. **Compliance with Federal Immigration Law:** The successful proposers shall not, during the performance of a contract for goods and services in the Commonwealth of Virginia knowingly employ an authorized alien as defined in the Federal Immigration Reform and Control Act of 1986.
12. **Severability:** Each paragraph and provision of the Agreement is severable from the entire Agreement, and if any provision is declared invalid, the remaining provisions shall nevertheless remain in effect.
13. **Contingent Fee Warranty:** The Successful Offeror warrants that it has not employed or retained any person or persons for the purpose of soliciting or securing the Agreement. The Successful Offeror further warrants that it has not paid or agreed to pay any company or person any fee, commission, percentage, brokerage fee, gift or any other consideration, contingent upon the award or making of the Agreement. For breach of one or both of the foregoing warranties, the School Board shall have the right to terminate the Agreement without liability, or, in its discretion, to deduct the amount of said prohibited fee.
14. **Financial Records Availability:** The Successful Offeror agrees to retain all books, records, and other documents relative to the Agreement for five (5) years after final payment. The School Board, its authorized agents and/or auditors shall have full access to and the right to examine any of said materials during this period.
15. **Ownership of Documents:** Any reports, studies, photographs, negatives or other documents prepared by the Successful Offeror shall be retained by the Successful Offeror and shall be remitted to the School Board by the Successful Offeror upon completion, termination or cancellation of the Agreement. The Successful Offeror shall not willingly use or allow or cause to have such materials used for any purpose other than performance of the Successful Offeror's obligations under the Agreement without the prior written consent of the School Board.
16. **Confidential Information:** All confidential and proprietary information and data furnished to the Successful Offeror by the School Board shall remain the property of the School Board. The Successful Offeror agrees to retain in confidence, and not to disclose to or use for the benefit of third parties, any information disclosed to the Successful Offeror by the School Board without the School Board's prior written consent. Excluded from the provisions of the Agreement shall be such information as:
 - a. Information which is in the public domain or which the Successful Offeror can show to have been in its possession independently of and prior to such disclosure by the School Board;
 - b. Information which becomes public knowledge after such disclosure, without fault on the part of the Successful Offeror or its employees;
 - c. Information made available to the Successful Offeror from a third-party source without any secrecy obligation attaching thereto; and
 - d. All information uncovered during an investigation conducted by the Successful Offeror that is required to be reported by the Successful Offeror to appropriate agencies pursuant to local, state or federal statutes (i.e., especially concerning or affecting public health and safety). The Successful Offeror will attempt to notify the School Board prior to any such reporting.
17. **Compliance with Law and Standard Practices:** The Successful Offeror shall perform its obligations under the Agreement in compliance with any and all applicable federal, state and local laws, rules, and regulations, including applicable licensing requirements, and in compliance with any and all rules of the School Board relative to the premises. The Successful Offeror shall be responsible for obtaining all permits, consents, and authorizations as may be required to perform its obligations.

18. **Documentation/Information:** The Successful Offeror will maintain and provide the School Board, upon request by the School Board, with the records, reports or other information to document attendance and participation of employees.
19. **Taxes, Fees, Code Compliance and Licensing:** The Successful Offeror shall be responsible for the payment of any required taxes or fees associated with the Agreement. All work shall be in compliance with all applicable codes, ordinances and permitting requirements.
20. **Indemnification and Hold Harmless:** The Successful Offeror agrees to the extent permitted by applicable law, to indemnify and hold the School Board and its representatives harmless against any and all liabilities, losses, cost or expenses (including reasonable legal fees and expenses) of whatsoever kind and nature which may be imposed on, incurred by or asserted against the School Board at any time to the extent such liability, loss or expense results from the Successful Offeror's negligence, breach of the terms hereof, or willful misconduct under the terms of this Agreement or applicable law.
21. **Insurance:** The Successful Offeror shall not commence work under this Agreement until he/she has obtained all insurance required under this section and such insurance has been approved by the School Board. The School Board will be named on all liability policies and Workers' Compensation policies as "Additional Insured" or "Alternate Employer Endorsement" for the proposed work.
22. **Workers' Compensation Insurance and Employers' Liability Insurance:** The Successful Offeror shall obtain and maintain during the life of this Agreement the applicable statutory Workers' Compensation Insurance with an insurance company duly authorized to write such insurance. The Successful Offeror shall obtain and maintain during the life of this Agreement, Employers' Liability Insurance with a limit of \$500,000.00 per accident/injury by an insurance company duly authorized to execute such insurance in the State of Virginia.
23. **Professional Liability Insurance:** The Successful Offeror shall procure and maintain professional liability insurance for protection from claims arising out of the performance of professional services caused by a negligent act, omission or error for which the insured is legally liable; such liability insurance will provide for coverage in the amount of five million dollars, with such deductible provisions as required by the School Board.
24. **Public Liability Insurance:** The Successful Offeror shall maintain during the life of this Agreement such Public Liability Insurance as shall protect him/her against claims for damages resulting from bodily injury, including wrongful death, and property damage which may arise from operations under this Contract whether such operations be by himself/herself or his/her employees.
25. **Certificate of Insurance:** The Successful Offeror shall furnish the School Board with two (2) copies of certificate of insurance evidencing policies required. The Successful Offeror shall not change any required insurance during the life of this Agreement unless notice of any such change in coverage is given in writing by the Successful Offeror to the School Board at least fourteen (14) calendar days prior to having any such change in coverage.
26. **Suspension or disbarment:** In submitting your response, the proposer is certifying that the proposer has not been suspended or disbarred at any level of government and is eligible to be awarded a contract.
27. **State Corporation Commission ID:** Any bidder or offeror organized or authorized to transact business in the Commonwealth of Virginia shall provide as a part of their bid documentation the identification

number issued to it by the State Corporation Commission. Any bidder or offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under title 13.1 or Title 50 or as otherwise required by law shall include in its bid or proposal a statement describing why the bidder or offeror is not required to be so authorized. No award will not be made without this information.

EXHIBIT I

CONTRACTOR/EMPLOYEE BACKGROUND CERTIFICATION

Pursuant to Virginia Code Section 22.1-296.1.C, prior to the award of a contract for the provision of services that require the contractor or any of its employees to have direct contact with students, the school board is required to have the contractor, and when relevant, any employee who will have direct contact with students, provide certification that (i) he has not been convicted of a felony or any offense involving the sexual molestation or physical or sexual abuse or rape of a child; and (ii) whether he has been convicted of a crime of moral turpitude. So as not to place an undue burden or hardship on the day-to-day operation of the school division and remain in compliance with the aforementioned Code provision, any contractor providing services for Suffolk Public Schools, whose employees will have direct contact with students, is required to provide the certification listed below:

As a contractor providing services for Suffolk Public Schools, whose employees will have direct contact with students, I certify that neither the contractor nor any of its employees, whether current employees or those who will be employed in the future, have been (i) convicted of a felony or any offense involving the sexual molestation or physical or sexual abuse or rape of a child; nor (ii) convicted of a crime of moral turpitude.

Contractor Name _____

Business Address _____

Phone Number _____

Certified by _____

Printed Name _____

Title _____

Date _____

Any person making a materially false statement regarding any such offense shall be guilty of a Class 1 misdemeanor and, upon conviction, the fact of such conviction shall be grounds for the revocation of the contract to provide such services and, when relevant, the revocation of any license required to provide such services. School boards shall not be liable for materially false statements regarding the certifications required by this subsection.

For the purposes of this subsection, "direct contact with students" means being in the presence of students during regular school hours or during school-sponsored activities.

**EXHIBIT II
TPA Services Response Form (Workers' Compensation Claims)
Offeror's Response Form**

THIS RESPONSE FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL
****This section is available as a Word document upon request****

Name and Address of Firm/Office to provide services:

Name: _____
 Address: _____
 City/State/Zip: _____
 Contact Person: _____
 Title: _____
 Phone Number: _____
 Email Address: _____

Workers' Compensation Claims TPA Services

Please state your company's position on each item in the space provided.

A. NEW CLAIMS

1. Will claims be processed in accordance with the Virginia Workers' Compensation Act and all regulations and rules promulgated by the Virginia Workers' Compensation Commission as well as other state and federal requirements?

RESPONSE: _____

2. Will your Claims services include tabulating, reserving, and approving for payment all medical bills, hospital bills, indemnity payments, and other benefits required by law, which will be paid in a manner prescribed by the School Board?

RESPONSE: _____

3. Please describe your firm's approach to investigating and adjusting all new work-related injuries and illnesses to School Board employees. Also, describe how you will advise and make recommendations to the School Board regarding the compensability of the claims.

RESPONSE: _____

4. Describe how your firm will receive notification of injury/illness from the School Board. Will this be accomplished on-line, by a toll free telephone number, by fax, or by e-mail? Will the phone, fax, and/or e-mail be monitored and answered 24 hours a day, 7 days a week? If not, please describe the method for immediate notification provided by your firm.

RESPONSE: _____

5. Will your firm produce the "Employer's Accident Report" and make telephone contact with the employee and the School Board's designated personnel within 24 hours or next business work day of receiving the claim notice? In the event of a serious injury or illness, notification to the School Board's designated personnel must be facilitated by telephone, fax, or e-mail within 24 hours or next business work day of receipt of the claim.

RESPONSE: _____

6. Will your firm contact the School Board and the injured employee within one (1) business work day of notification of a workers' compensation claim where an employee will miss more than three (3) business work days from work? How will contact be made—by telephone?

RESPONSE:

7. Depending on the nature of the injury or accident, will claims investigations be initiated within one to three days after your firm has been notified of the situation?

RESPONSE:

8. Will all injuries that, by nature, as required by law, be reported to the Virginia Department of Labor and Industry be identified immediately and reported to the School Board's designated personnel?

RESPONSE:

B. RETURN TO WORK

9. Describe your firm's procedures with regard to recommending, approving, and coordinating the use of a Return to Work Plan for regular or light duty.

RESPONSE:

10. Will you actively request and obtain from the School Board injured employee job descriptions, provide this information to the treating physician, and establish a target return to work date based on the treating physician's recommendations? Describe this process. How and within what time frame will you notify the School Board's designated personnel once the injured employee is released to regular or light duty?

RESPONSE:

C. NETWORK OF HEALTH CARE PROVIDERS

11. Will your firm provide the School Board with access to a network of health care providers with which your firm has reduced fee contracts? Please provide a complete list or directory of your health care provider network in the City of Suffolk and its surrounding jurisdictions.

RESPONSE:

12. The proposed network of health care providers shall include primary care physicians and facilities skilled in treating injured workers. The network shall also include appropriate physician specialties, as well as other health care providers including, but not limited to hospitals, outpatient clinics, and providers of physical, aqua and occupational therapy, chiropractic, rehabilitation, functional capacity assessment, work hardening, and diagnostic services. Please identify your network providers for these special services in the Suffolk area.

RESPONSE:

13. Explain how your firm would attempt to negotiate or contract with any health care providers on the School Board's current panel of physicians/providers that are not presently under contract with your firm. How would new health care providers be added to your network?

RESPONSE:

14. Will your firm provide a program of discounted prescription services for short term and long term medications that will provide prompt access to prescribed medications and common pharmacy services? Please provide a directory of participant pharmacies. Is there a reimbursement process for prescription drugs? Do you have means of educating providers in utilizing generic and/or multi-brand drugs? Do the pharmacy services include a review for drug interactions and allergies? Does your firm utilize a mail order pharmacy network for long term needs?

RESPONSE:

D. COST OF CONTAINMENT/CASE MANAGEMENT

15. The TPA firm shall use management methods to contain costs of medical care, expenses, and lost time for injured employees. Please describe in detail your firm's methods for containing costs and providing case management. Please indicate any claims management services that will be contracted out to another firm.

RESPONSE:

16. Will your firm audit all medical services and hospital bills to verify that services were rendered for the charges made? Does your firm contract out medical or hospital bill review services to an outside firm? Please describe exactly who will audit the bills, their relationship to your firm, and fees associated.

RESPONSE:

17. Please describe your firm's system in place for insuring that there are no duplicate payments of bills. Your firm shall have the responsibility for any fines, penalties, interest charges, or duplicate claim payments incurred by the School Board as a result of your firm's failure and/or negligence.

RESPONSE:

18. Describe your firm's use of scheduling independent medical evaluations as permitted by the Virginia Workers' Compensation Commission.

RESPONSE:

E. FINANCIAL

19. Under a self-insurance funding arrangement proposal, how much money would need to be deposited to the escrow/trust account in order to pay claims and for other expenses? Please explain in detail. Also would this escrow / trust account be an interest bearing account? If so, please provide details.

RESPONSE:

20. Your firm will disburse payments on behalf of the School Board to all claimants, the School Board, and providers from the escrow/trust account. Will you provide monthly, quarterly and annual reconciliations of these payments? Also, will you provide a monthly check register indicating all checks issued during the previous month and include the name of the claimant and claim number for reference?

RESPONSE:

21. Will your firm verify that financial activity through the escrow/trust account on claims is properly reconciled with the computerized cumulative loss data reports?

RESPONSE:

22. Will a claims supervisor or manager review, evaluate the reserve adequacy, and report on open claims activity at least quarterly? Please describe your procedures for monitoring reserves and keeping the School Board's designated personnel informed.
RESPONSE:
23. Quarterly contact with the School Board's representative shall be made on any claim or injury when a total reserve is expected to be over \$10,000. Checks/payments for \$10,000 and above must be approved by the School Board's designated personnel prior to issue.
RESPONSE:
24. Will your firm provide claims payments within 10 days of receipt of the bill?
RESPONSE:
25. Final Claims Settlement Authority rests with the School Board. All Claims Settlements will include a detailed case synopsis, settlement recommendation, and itemization of paid indemnity, medical benefits, expenses, and the present day values of future benefits. Please describe any variances or suggested modifications.
RESPONSE:
F. LEGAL
26. The TPA will work with, and provide documentation to the School Board's designated personnel regarding any litigation that arises from or is related to any claim handled under the contract for services. Describe how your firm will provide assistance in the litigation process by conducting fraud detection analysis, taking recorded statements, answering interrogatories, investigating claims, and attending hearings and trials.
RESPONSE:
27. Please describe the legal representation that would act on behalf of the School Board, including the name of the legal counsel as well as your firm's procedures for such an event. Will the School Board have the option to select the legal firm of representation? The claim file will be transmitted to the School Board's designated personnel, as well as designated Counsel no later than fourteen (14) days prior to any scheduled hearing before the Virginia Workers' Compensation Commission.
RESPONSE:
28. Please provide examples of how your firm actively utilizes and works with the Insurance Fraud Investigation Unit of the Virginia State Police.
RESPONSE:
29. Please describe how your firm will keep the School Board informed of revisions to state and federal statutes or legislation affecting the self-insured workers' compensation program.
RESPONSE:
G. SUBROGATION AND SECOND INJURY TRUST FUND
30. Will the TPA firm work with and provide documentation to the School Board's designated personnel regarding the pursuit of subrogation opportunities and initiate all proceedings to recover medical, indemnity, and expense costs

from responsible third parties? Will the determinations be made within 15 business work days of the receipt of claim?
RESPONSE:
31. Fully describe any fees, charges, or percentages of recovery amounts your firm will charge for these subrogation services.
RESPONSE:
H. REPORTING REQUIREMENTS
32. Will your TPA firm provide, prepare, maintain, and file all records and reports required by the Excess Insurance carrier, the Virginia Workers' Compensation Code, the Virginia Department of Labor and Industry, the Virginia Workers' Compensation Commission, the U.S. Occupational Safety and Health Administration, the Virginia Occupational Safety and Health Commissions, and all other state and federal administrative agencies having jurisdiction over the claims to be handled under the contract? Please provide a detailed description of the required reports (for example, the OSHA 300 log and report, EDI, etc.) and your services regarding these reporting activities.
RESPONSE:
33. Will your firm file the Employer's Accident Report with the Virginia Workers' Compensation Commission within two (2) business work days of receipt?
RESPONSE:
I. CLAIMS DATA/FILES AND RISK MANAGEMENT REPORTS
34. Will the TPA firm provide on-line access to individual claims status information on major claims handling decisions?
RESPONSE:
35. Will the TPA provide a comprehensive claims management electronic information system for maintaining claims data and records on all new claims (including transferred open claims data, if necessary)? Will the TPA firm provide the School Board access to electronic loss report summaries to the School Board? RFP finalists may be required to present their on-line claims and risk management systems capabilities.
RESPONSE:
36. Please describe your firm's capabilities to provide the School Board with "on line" or internet-based access regarding the entry of claims from all school locations, user access of individual claims information and cumulative program loss summaries. Will the information accessed on-line be real time data?
RESPONSE:
37. Is your firm "paperless" and will it provide on-line access to claims-related documents?
RESPONSE:
38. At the conclusion of any contract awarded pursuant to this RFP, the School Board shall be provided with all matters comprising the claims files and services under the agreement. In the event the contract terminates, for whatever reason, or prior to the completion of the contract, the Claims Administrator will turn over to the School Board's representative all data in usable form, in a timely basis, and at no additional cost. Please describe in detail your

firm's procedures regarding the conclusion or termination of services and the return of claims files and other information to the School Board. Will you comply?

RESPONSE:

39. Optional - Claims Data and Electronic Document Conversion: At the School Board's discretion and if necessary, the selected TPA firm will accept transfer from the School Board's present claims administrator of electronic data and documents on all open and closed workers' compensation claims. Data should be integrated into the selected TPA firm's database for purposes of generating loss reports in formats required by the School Board. What are the logistics, and time frame for converting the School Board's historical data from the incumbent TPA into your system? Has your firm ever performed a historical claims data and electronic document conversion with Sedgwick CMS system? Estimated number of open claims for takeover is 30 lost time and 12 medical only.

RESPONSE:

J. LOSS PREVENTION/CONTROL/SAFETY

40. On an as needed basis, will your TPA firm provide services through loss prevention/safety specialists and other appropriate staff to assess the School Board's workers' compensation losses and current risk exposures? Will your firm be able to recommend, devise, and assist the School Board in the implementation of effective workers' compensation loss prevention/control measures and employee safety incentive programs? Please provide a brief outline of at least one of your firm's most effective workers' compensation loss prevention programs and identify how your firm's assistance has provided a return of investment for your clients.

RESPONSE:

41. At the School Board's request, will your TPA firm be able to periodically attend safety committee meetings, conduct safety training sessions, assist with establishing safety policy statements, and developing safety and policy manuals? In your proposal, please specify the public school expertise of the assigned loss prevention/safety specialists.

RESPONSE:

K. STAFFING OF TPA FIRM

42. In your proposal, please provide an organizational chart for the office responsible for servicing the School Board's account as well as an organizational chart for the overall firm.

RESPONSE:

43. In your proposal, please provide the specific employee names, resumes, and the roles of each member of the service team that would be assigned to the School Board's account.

RESPONSE:

44. Will there be separate adjusters assigned to each medical and indemnity type claim? What is the total average caseload per indemnity adjuster at any given time? Will your firm change adjusters handling the School Board's claims if problems or dissatisfaction with services should arise?

RESPONSE:

L. RISK MANAGEMENT INFORMATION FOR TPA FIRM

45. Does your firm have errors and omissions insurance with a minimum \$5,000,000 limit covering claims arising out of its performance under this proposal? Is the errors and omissions insurance coverage provided by a carrier with an A. M. Best Rating of A- or better? Has your firm submitted any customer dissatisfaction claims under its E&O

coverage in the last five years? If so, please describe the circumstances as it pertains to such claims.
RESPONSE:
46. Does your firm have Blanket Fidelity Bond protection covering your employees handling funds and working on behalf of the School Board?
RESPONSE:
47. Does your firm have a Quality Control system in place for receiving and tracking service complaints?
RESPONSE:
48. Describe your firm's corporate quality assurance program in place that monitors the activities and effectiveness of your workers' compensation claims services. Does your firm have a current Service Organization Control (SOC) report? If so, please provide a copy of your most recent report.
RESPONSE:
49. Will your firm immediately notify the School Board of any irregularities found in your firm's own audit as it relates to the School Board's account or other accounts that would have a significant impact on your firm's overall business operations?
RESPONSE:
50. Describe how collection and provision of claims data shall conform to the requirements of all applicable federal and state laws and codes, including without limitation, the Virginia Freedom of Information Act, applicable identity theft federal acts and the Privacy Protection Act of 1976. What procedures does your firm have in place to maintain compliance with applicable federal and state statutes relative to the School Board's self-insured workers' compensation program?
RESPONSE:
51. What steps will be taken to safeguard any paper or computer generated data, files, reports or other information from loss, destruction or erasure? Describe your firm's procedures for securing files and electronic data from fire, theft, outside tampering, failure of your computer system, or other perils. Liability for any loss of such data shall be borne by your firm, unless at the time of loss said data was in the exclusive custody of the School Board.
RESPONSE:
52. Will the School Board's claim files and records be maintained by your firm in the Commonwealth of Virginia and available for review and audit at any time (including your place of business)? Will the School Board or its designated representative have the right to audit claims files and will they be authorized to have access to all data including paper and electronically prepared documents?
RESPONSE:
53. Does your firm have a plan for maintaining TPA services to the School Board in the event of a fire, theft, failure of your computer system, or other perils? Please briefly describe your firm's contingency plan to continue to provide services in case of such occurrences.
RESPONSE:
M. CHARGES AND FEES FOR TPA FIRM

Please provide a detailed response regarding charges and fees for each of the following:
54. The School Boards preference is to secure bundled services on a flat annual fee for the life of the contract. Please provide your flat annual fee, indicating what services are included/bundled in such fee. (IE: Claim handling, Administration fees, Web Imaging, On-line Claims access, OSHA log, etc.)
RESPONSE:
Should the School Board choose to elect a per claim fee structure in lieu of flat annual; please provide detailed responses to the below:
<u>55.</u> Lifetime of Contract - Flat Charge per New Lost Time Claim. Describe what would necessitate additional charges for these claims.
RESPONSE:
56. Lifetime of Contract - Flat Charge per New Medical Only Claim. Describe what would necessitate additional charges for these claims.
RESPONSE:
<u>57.</u> Report Only Claims (to include in cumulative loss reports only) - Flat Charge Each
RESPONSE:
58. Handling an Existing Open Lost Time Claim for life of contract – Flat Charge
RESPONSE:
59. Handling an Existing Open Medical Only claim life of contract – Flat Charge
RESPONSE:
60. In addition to the fees for the above per claim services, please indicate any Annual Administration Fee
RESPONSE:
61. Based on the information provided, what would be the balance requirement for the escrow fund from which claims are paid?
RESPONSE:
62. Is there a fee for obtaining claims information or comprehensive risk management reports on an “as needed” basis?
RESPONSE:
<u>63.</u> Is there a fee for providing the School Board with online claims status and loss information?
RESPONSE:
<u>64.</u> Please state the specific charges involved in converting the School Board’s Historic Claims Data and documents to your system. Can this conversion be completed in 30 days or less from the date the contract is awarded?
RESPONSE:

65. Please state the hourly charge for Loss Control and Safety Services as described in this RFP.
RESPONSE:
N. Cost Containment Features <i>not included in your Administration Fee</i>
Please describe your charges and fees in detail for each of the following:
66. Managed Care Case Management - Telephonic Fee Per Hour
RESPONSE:
67. Managed Care Case Management - On-Site Fee Per Hour
RESPONSE:
68. Pre-certification of Treatment - Fee Per Case
RESPONSE:
69. Utilization Review - Fee Per Hour
RESPONSE:
70. What is the fee percentage of medical savings applied by your firm?
RESPONSE:
71. Preferred Provider Network - Percent of Savings Fee
RESPONSE:
72. Preferred Pharmacy Provider Discounts - Percent of Savings Fee
RESPONSE:
73. Preferred Panel of Physicians - Peer Review - Specific Charge
RESPONSE:
74. Claim Indexing - Fee Charged Per Claim
RESPONSE:
75. Medical Bill Audit Review for Re-pricing - fee per line or flat fee per bill
RESPONSE:
76. Hospital Bill Audit Review for Re-pricing - fee per line or flat fee per bill
RESPONSE:
77. Continuing Stay Review - Fee Per Hour
RESPONSE:
78. Vocational Rehabilitation - Fee Per Hour
RESPONSE:

79. Legal Services or Claims Consultation - Fee Per Hour
RESPONSE:
80. Fraud Control - Investigative Fee Per Hour
RESPONSE:
81. Fraud Control - Surveillance Fee Per Hour
RESPONSE:
82. Expert Witness Services - Fee Per Hour
RESPONSE:
83. Fee, if any, for seeking recoveries under the Excess Liability insurance?
RESPONSE:
Please provide detailed responses to the following questions;
84. Please describe any other fees or charges not listed above that are involved with utilizing your comprehensive claims administration services.
RESPONSE:
85. With regard to the "Percent of Savings" your firm will receive, please describe in detail your definition of "Savings" to which a "fee" is assessed.
RESPONSE:
86. Describe <i>all forms</i> of compensation that your firm will generate in relation to the services provided in this RFP.
RESPONSE:
87. Describe any other benefits options that your firm has the ability to offer that would enhance your proposal(s) including an itemized cost listing.
RESPONSE:
88. Define indemnity claim, medical only claim and report only claim.
RESPONSE:

**EXHIBIT III
Workers' Compensation Excess Liability
Offeror's Response Form**

THIS RESPONSE FORM MUST BE COMPLETED AND RETURNED WITH PROPOSALS
****This section is available as a Word document upon request****

Name and Address of Firm/Office to provide insurance policy services:

Name: _____
 Address: _____
 City/State/Zip: _____
 Contact Person: _____
 Title: _____
 Phone Number: _____
 Email address: _____
 Insurance Company Name: _____
 Current AM Best Rating: _____

Please respond yes or no to the following:

LIMITS OF INSURANCE	RESPONSE:
COVERAGE A –Excess Workers' Compensation - Part One	
Statutory Limit Each Accident	
Statutory Limit Each Disease	
COVERAGE B – Employers' Liability - Part Two	
Bodily Injury by Accident--\$1,000,000 Each Accident	
Bodily Injury by Disease--\$1,000,000 Each Employee	
SPECIFIC RETENTION AMOUNT-\$550,000 per occurrence	
TERMS & CONDITIONS	
The named insured shall read: "The Suffolk City School Board and any affiliated, associated, or subsidiary board or entity now held or hereinafter acquired or constituted."	
Other States Coverage: "All states except monopolistic states and those mentioned in item 3A".	
Is retention per occurrence as requested?	
Provide the Voluntary Compensation Endorsement.	
Provide 90-day Notice of Cancellation, Non-renewal or Material Change in Coverage endorsement or similar wording.	
Provide Terrorism Risk Insurance Act endorsement.	
Provide Aircraft Coverage to cover flying on scheduled commercial airlines and chartered flights.	
Provide Federal Acts coverage on an "if any" exposure basis.	
Provide Punitive or Exemplary Damages coverage for our employers' liability as allowed per statute.	
Provide Employers' Liability coverage for Board Members, Administrators, and Supervisors acting within the scope of their duties	
Any reporting restrictions on time for occupational disease claims? If so, please describe.	

TERMS & CONDITIONS...continued	
The effective date for coverage will be July 1, 2026.	
Have you included a specimen copy of your policy form along with a copy of any endorsements to the policy broadening or restricting coverages?	
Have all late reporting penalty clauses been removed?	
Confirm payrolls provided within this RFP were used in proposal.	
ESTIMATED PREMIUM	ESTIMATED PREMIUM AND/OR: RATE PER \$100 PAYROLL
VA Statutory Excess Coverage above a \$550,000 Specific Retention:	
OPTION:	INDICATE ADDITIONAL COST TO ABOVE
Cash Flow Protection Endorsement at \$250,000 retention. (Included examples of endorsement application and indicate additional cost.)	

EXHIBIT IV

EMPLOYEE CENSUS, LOCATION DETAIL AND RELATED INFORMATION

EMPLOYEE CENSUS – 2025-2026

POSITION	# OF EMPLOYEES
Accountants and Assistant Accountants	15
Administrators and Assistant Administrators	49
Bookkeepers	20
Bus Drivers	86
Cafeteria Managers	17
Cafeteria Workers	89
Custodians	98
Instructional Assistants	265
Media Specialists	21
Mechanics	6
Principals and Assistant Principals	51
Administrative Assistants	55
Superintendents and Assistant Superintendents	1
Supervisors and Assistant Supervisors	8
Teachers	1021
Nurses	25
Psychologists	4
All Other	312
TOTAL NUMBER OF EMPLOYEES	2143

CURRENT BREAKDOWN OF EMPLOYEES AND NUMBER OF STORIES BY LOCATION

School	# of Professional Employees	# of Non-Prof Employees	# of Stories by location
School Admin Offices 100 N Main Street, Suffolk, VA	62	35	7
Transportation 120 Forest Glen Dr., Suffolk, VA	3	21	1
Operations Center 3264 Pruden Blvd., Suffolk, VA	7	14	1
Technology Dept. 2325 E. Washington St., Suffolk, VA	11	19	1
Booker T. Washington Elementary 205 Walnut Street, Suffolk, VA	44	40	1
Col. Fred Cherry Middle 7401 Burbage Grant Dr., Suffolk, VA	57	28	2
College & Career Academy 4169 Pruden Blvd., Suffolk, VA	22	11	1
Creekside Elementary	56	48	1

1000 Bennett's Creek Park Rd., Suffolk, VA			
Maintenance Dept.	3	32	1
1402 Bright Lane, Suffolk, VA			
Elephant's Fork Elementary	43	37	1
2316 William Reid Dr., Suffolk, VA			
Florence Bowser Elementary	65	51	2
4540 Nansemond Pkwy., Suffolk, VA			
Forest Glen Middle	41	24	1
200 Forest Glen Dr., Suffolk, VA			
Hillpoint Elementary	58	38	1
1101 Hillpoint Rd., Suffolk, VA			
John F. Kennedy Middle	50	26	2
2325 E. Washington St., Suffolk, VA\			
John Yeates Middle	46	27	1
4901 Bennett's Pasture Rd., Suffolk, VA			
Kilby Shores Elementary	39	41	1
111 Kilby Shores Dr., Suffolk, VA			
King's Fork High	123	44	2
351 King's Fork Rd., Suffolk, VA			
King's Fork Middle	85	42	2
350 King's Fork Rd., Suffolk, VA			
Lakeland High	91	36	2
215 Kenyon Rd., Suffolk, VA			
Mack Benn Jr. Elementary	53	49	1
1253 Nansemond Pkwy., Suffolk, VA			
Nansemond Parkway Elementary	41	29	1
3012 Nansemond Pkwy., Suffolk, VA			
Nansemond River High	120	44	2
3301 Nansemond Pkwy., Suffolk, VA			
Northern Shores Elementary	58	44	1
6701 Respass Beach Rd., Suffolk, VA			
Oakland Elementary	38	32	1
5505 Godwin Blvd., Suffolk, VA			
Southwestern Elementary	43	49	2
150 Pioneer Rd., Suffolk, VA			
Turlington Woods School	16	6	1
620 Turlington Rd., Suffolk, VA			
Misc. Locations	54	121	1
TOTALS	1,277	866	

All employees are assigned to one location even if they work at multiple locations

EXHIBIT V**WORKERS' COMPENSATION UNDERWRITING INFORMATION****ESTIMATED PAYROLL DETAIL – 2025-26**

Description	Code	Estimated 2025-26
Drivers and Helpers	7380	5,798,651
Professional Employees	8868	115,390,947
All Others	9101	9,099,902
Total		130,289,500

**WORKERS' COMPENSATION – EXCESS INSURANCE
PREMIUM & PAYROLL HISTORY**

POLICY YEAR	INSURANCE CARRIER/ SPECIFIC RETENTION	TOTAL PAYROLL	ANNUAL PREMIUM	ESTIMATED OR AUDITED PAYROLL
Current 7/1/19-20	State National/\$600,000	\$96,530,881	\$49,520	Audited
7/1/2020-21	Star National/\$600,000	\$101,357,425	51,996	Audited
7/1/2021-22	Star National/\$600,000	\$105,411,721	\$60,506	Audited
7/1/2022-23	Star National/\$600,000	\$110,682,924	\$66,631	Audited
7/1/2023-24	Star National/\$600,000	\$122,066,996	\$73,484	Audited
7/1/2024-25	Star National/\$600,000	\$131,163,499	\$75,150	Audited
7/1/2025-26	Safety National/\$550,000	\$130,289,500	82,343	Estimated

MISCELLANEOUS INFORMATION:

- Suffolk School Board **does not** own, lease or charter any aircraft or watercraft.
- Employees of Suffolk School Board **do not** travel to foreign countries.
- Suffolk Public School Board **does have** a formal safety program in place.
- Suffolk Public School Board **does have** a formal return to work program.

EXHIBIT VI

APPROVED PANEL OF PHYSICIANS

Nowcare, with Bayview Physicians, 3060 Godwin Blvd. #8274, Suffolk, VA 23434, Phone: 757-935-5310.

Nowcare, with Bayview Physicians, 4868 Bridge Road, #320. Suffolk, VA 23435. Phone: 757-483-7198.

Nowcare, with Bayview Physicians, 725 Volvo Pkwy, Chesapeake, VA 23320. Phone: 757-842-4100.

Velocity, with Dr. Tim Lee, 2760 Godwin Blvd. Ste. 101, Suffolk, VA 23434. Phone 757-934-4162.

I and O Medical, 838-A Old George Washington Hwy. N. Chesapeake, VA 23323, Phone: 757-487- 9600.

Orthopedic Foot and Ankle

1. John Duerden, MD with Ortho VA, 1717 Will O Wisp Drive, Suite 100, Virginia Beach, VA 23454. Phone:757-422-8476

2. Jeremy Walters, DPM, with SMOC, Chesapeake, Burnetts Way and North Suffolk. Phone: 757-547-5145.

3. Michael Campbell, MD with AOS. Phone: 757-321-3300. Chesapeake location. Or Blake Moore, MD

4. Nelson Kelly, DPM, with Hampton Roads Ortho and Spine and Sports Medicine, 732 Thimble Shoals Blvd. Ste, 803, Newport News, 23606. Phone: 757-873-1554.

Orthopedic Elbow

1. Brick Campbell, MD, with Ortho VA, 1717 Will O Wisp Drive, Suite 100, Virginia Beach, VA 23454. Phone: 757-422-8476

2. Daniel Cavazos, MD with Hampton Roads Ortho and Spine and Sports Medicine, 732 Thimble Shoals Blvd. Ste, 803, Newport News, 23606. Phone: 757-873-1554.

3. Chad Manke, MD, with AOS. Phone: 757-321-3300. Chesapeake location.

4. Hassan M. Shah, MD, with Sentara Ortho, 725 Volvo Parkway, Ste. 210, Chesapeake, VA 23320, Phone: 757-252-4130.

5. Robert Campolatarra, MD with Tidewater Ortho. 901 Enterprise Parkway, Ste. 900, Hampton, VA 23666. Phone: 757-827-2480. OR

6. Robert Mason, MD with Tidewater Ortho. 3920A Bridge Road, Ste. 302, Suffolk, VA 23435. Phone: 757-827-2480.

Orthopedic Shoulder

1. Brick Campbell, MD, with Ortho VA, 1717 Will O Wisp Drive, Suite 100, Virginia Beach, VA 23454. Phone: 757-422-8476

2. Anthony Bevilacqua, DO with SMOC, Burnetts Way and North Suffolk, Phone: 757-547-5145. OR Geoffrey Wright, MD, with SMOC, Chesapeake and North Suffolk, Phone: 757-547-5145.

3. Mark Bewley, MD, with AOS. Phone: 757-321-3300. Chesapeake location. Or Chad Manke, MD

4. Daniel Cavazos, MD with Hampton Roads Ortho and Spine and Sports Medicine, 732 Thimble Shoals Blvd. Ste, 803, Newport News, 23606. Phone: 757-873-1554.

5. Loel Payne, MD, with Tidewater Ortho. 3920A Bridge Road, Ste. 302, Suffolk, VA 23435. Phone: 757-827-2480.

Orthopedic Knee

1. Brick Campbell, MD, with Ortho VA, 1717 Will O Wisp Drive, Suite 100, Virginia Beach, VA 23454. Phone: 757-422-8476

2. Anthony Bevilacqua, DO with SMOC, Burnetts Way and North Suffolk, Phone: 757-547-5145. OR Geoffrey Wright, MD, with SMOC, Chesapeake and North Suffolk, Phone: 757-547-5145.

3. Daniel Cavazos, MD with Hampton Roads Ortho and Spine and Sports Medicine, 732 Thimble Shoals Blvd. Ste, 803, Newport News, 23606. Phone: 757-873-1554.

4. Loel Payne, MD, with Tidewater Ortho. 3920A Bridge Road, Ste. 302, Suffolk, VA 23435. Phone: 757-827-2480.

Orthopedic Spine

1. Bryan Fox, MD with SMOC, Burnetts Way and North Suffolk, Phone: 757-547-5145.

2. Charles Shuff, MD, with AOS. Phone: 757-321-3300. Chesapeake and Kempsville location

3. John W. Aldridge, MD with Hampton Roads Ortho and Spine and Sports Medicine, 732 Thimble Shoals Blvd. Ste, 803, Newport News, 23606. Phone: 757-873-1554.

Orthopedic HIP

- 1. Geoffrey Wright, MD, with SMOC, Chesapeake and North Suffolk, Phone: 757-547-5145.**
- 2. Luke Balsamo, MD with AOS. Phone: 757-321-3300. Kempsville location.**

Orthopedic Hand/Wrist

- 1. Wayne Chen, MD, with Ortho VA, 1717 Will O Wisp Drive, Suite 100, Virginia Beach, VA 23454. Phone: 757-422-8476**
- 2. Nicolai Baecher, MD, with SMOC. Phone: 757-547-5145.**
- 3. Chad Manke, MD, with AOS. Phone: 757-321-3300. Chesapeake location.**
- 4. Hassan M. Shah, MD, with Sentara Ortho, 725 Volvo Parkway, Ste. 210, Chesapeake, VA 23320, Phone: 757-252-4130.**
- 5. Robert Campolatarra, MD with Tidewater Ortho. 901 Enterprise Parkway, Ste. 900, Hampton, VA 23666. Phone: 757-827-2480. OR**
- 6. Robert Mason, MD with Tidewater Ortho. 3920A Bridge Road, Ste. 302, Suffolk, VA 23435. Phone: 757- 827-2480.**

Interventional Radiology

- 1. James Henick, MD with SMOC, Burnetts Way and North Suffolk, Phone: 757-547-5145.**
- 2. James Sanderlin, MD and Jonathan Strand, MD with AOS. Kempsville location. Phone: 757-321-3300.**
- 3. Martin Ton, MD, 1080 First Colonial Road, VB. Phone: 757-395-6450.**

Pain Management (oral medications)

- 1. Robert Spear, MD, with Coastal Virginia Spine and Pain Center, 4525 South Boulevard, Ste. 200, VB 23452. Phone: 757-227-3820.**
- 2. Beth Winke, MD, with Winke Orthopedic Pain Management Center, Chesapeake and Suffolk locations. Phone: 757-216-4030.**

Ophthalmologist

- 1. Sarah Mahmoud, OD or Ranjani Panda, OD with Virginia Eye Consultants, 2463 Pruden Blvd. Suffolk, VA 23434. Phone: 757-622-2200.**
- 2. Joy Tomko, OD with Tidewater Eye Centers, 3235 Academy Ave. St. 201. Portsmouth, VA 23703. Phone: 757-483-0400.**

3. EVMS Lions Eye Center, 600 Gresham Dr. Norfolk, VA 23502. Phone : 800-453-6059.
4. Dr. Jennifer Schneider, 2016 Meade Parkway, Suffolk. VA 23434. Phone: 757-539-1533

Psychology

1. Transformation Health, 508 S. Independence Blvd. St. 200, Virginia Beach, VA 23452. Phone: 757-490-6463. Telehealth only. Individual therapy and medications.
2. EVMS Psychological Department , 825 Fairfax Ave. #710, Norfolk, VA 23507. Phone: 757-446-5888. Medications only.
3. Sharee Patterson, LPC, 6325 North Center dr. St. 230, Norfolk, VA 23502. Phone : 757-895-7609.
4. Cognitive Behavior Therapy, 1403 Greenbrier Pkwy Suite 215, Chesapeake, VA 23320. Phone: (757) 410-0700. Therapy only.

Allergist

1. Dr. Gary Moss, 528 Albemarle Dr. Chesapeake, VA 23322. Phone: 757-547-7702

EMG's

1. JoAnn Dervay, MD, with AOS. Phone: 757-321-3300. Kempsville location. Limited hours.
2. Bonne Nock, MD, with Coastal Virginia Spine and Pain Center, 4525 South Boulevard, Ste. 200, VB 23452. Phone: 757-227-3820. Limited hours.
3. EVMS, Physical Medicine and Rehab, 721 Fairfax Ave. 3 rd fl. Norfolk 23510. Phone: 757-446-5915.
4. Neurology Consultants of Tidewater, Halifax Building, 6161 Kempsville Circle, Ste. 315, Norfolk, VA 23502. Phone: 757-461-5400.

MRI, CT, and x-rays

1. Chesapeake Regional Imaging Centers, Chesapeake and Norfolk. Phone: 757-671-8500, Fax: 757-333-0256
2. MRI and CT Diagnostics for arthrograms ONLY. Virginia Beach and Chesapeake. Phone: 757-671-1144. Fax: 757-671-1152.

FOR SEVERE OR IMMEDIATE EMERGENCY SITUATIONS, USE SENTATA OBICI OR BELLEHARBOUR EMERGENCY ROOM

RFP 1888-P

Exhibit VII

Suffolk Public Schools

Claim Count and Supporting Loss Information

Data Valued as of 11/18/2025

Claim Count History

	7/2/21-6/30/22	7/2/22-6/30/23	7/1/23-6/30/23	7/1/24-6/30/25
Record Only	66	72	62	59
Medical Only	104	101	85	86
Indemnity	36	37	30	29



sedgwick®

Claim Report

Sedgwick Claims Management Services, Inc

CMS UNIT: 853

Requestor: Carlos Alvarez

b992477-00013 (0 09:53:53 11/18/2025)

ALL CLAIMS (OPEN OR CLOSED)
INCURRED AMOUNT >\$50,000
valued as of 11/18/2025

Client: 2477 Suffolk City School Board

Unit: ALL
Plan: ALL
Coverage: ALL
Carrier: ALL
Examiner: ALL
ICD Group: ALL
Include: CLAIMS, INCIDENTS
Major Classification: WC-ALL
Include Historical Pmnts: YES
Future-Exclude Zero?: NO
Incurred-Exclude Zero?: NO
Paid To Dt-Exclude Zero?: NO
Current Paid-Exclude Zero?: NO
Sort Option: Claimant
Payments: 01/01/1900-11/18/2025
Break Level: Client
Display Grand Total: YES
More Detail: YES
Include Deferred: YES
Include Pending: YES
Include Suspended: YES
Include Compromised: YES
Litigation: NO
Rehabilitation: NO
Apportion: NO
Tendered: NO
MC TCM: NO
SIF: NO
Filter on Event Financials: NO

Account: ALL
Blanks: Skip Blank Accts, Skip Blank Units
Line: ALL
Office: Office = ALL Home Office = ALL
Vendor: ALL
Claim Num Id: Sedgwick
Claim Status: OPEN,CLOSED
Subtypes: ALL
Future Range: ALL
Incurred Range: 50000-999999999.99
Paid To Dt Range: ALL
Current Paid Range: ALL
Date Option: LOSS
Claims: 01/01/1900-11/18/2025
As Of: 11/18/2025
Page Breaks: Client
Summary Only: NO
Include Accepted: YES
Include Denied: YES
Include Reinstated: YES
Include Terminated: YES
Include JURIS Administration: YES
Excess: NO
Subrogation: NO
Punitive Damages: NO
Erisa Appeal: NO
MC FC: NO
Other: NO
Mask SPII Data?: YES

Sedgwick Claims Management Services, Inc.

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CLAIMANT NAME	CLAIM NUMBER	SSN	LOST DYS	STATE	LOSS DESCRIPTION	EXAMINER	LOSS/IND PAID	MED PAID	EXP/OTH PAID	FUTURE RESERVE	TOTAL INCURRED
ALLISON, TONYA	30101000860-0001	-853		C-A	WC/MC WCIN 10/15/2010 ffields		95,254.32	222,657.27	34,602.05	0.00	352,513.64
	***-4313		204.00	C-A	EE SUFFERED SEVERE BACK PAIN						
Bagley, Betty J.	A985308575-0001-01	-853		C-A	WC/MC WCIN 12/10/2009 ffields		98,528.81	166,258.39	18,802.03	0.00	283,589.22
	***-7558		1197.00	C-A	Pain in right shoulder, neck, arm and be						
BAKER, JANET	7550010300020070009-853	-853		C-A	WC/MC WCIN 04/27/2007 ahsreynol		43,950.52	35,044.46	155.39	0.00	79,150.37
	***-1137		178.00	VA	WRIST INJURED WHILE ASSISTING ANOTHER TE						
BALCH, TIMOTHY	30165214061-0001	-853		C-A	WC/MC WCIN 01/21/2016 ffields		5,815.18	109,320.30	16,933.40	7,202.78	139,271.66
	***-9884		167.00	C-A	Strain/sprain to the left knee.						
BIGGS, JAMES A.	755001300020080011-853	-853		C-A	WC/MC WCIN 06/03/2008 ahsreynol		169,709.77	91,886.38	16,309.79	0.00	277,905.94
	***-3474		610.00	C-A	LOWER BACK: EMPLOYEE WAS PICKING UP A SP						
Boston, Ariene T.	4A2408HYPT-0001	-853		O-A	WC/MC WCIN 02/15/2024 ffields		32,114.99	104,481.34	25,682.30	32,647.70	194,926.33
	***-6950		-197.00	O-A	Right & Left knees						
Bradford, Sherry	4A2310310IQ-0001	-853		O-A	WC/MC WCIN 10/03/2023 ffields		50,123.72	41,472.13	21,720.20	12,401.12	125,717.17
	***-8188		463.00	VA	Student had an anger episode and attacke						
BROWN, ERNEST L.	A985306728-0001-01	-853		C-A	WC/MC WCIN 09/18/2009 ffields		8,016.18	64,025.83	24,255.14	0.00	96,297.15
	***-6838		1048.00	VA	BACK INJURY						
Brown, Karen B.	4A21099AK4-0001	-853		O-A	WC/MC WCIN 09/02/2021 ffields		5,381.67	25,362.08	26,776.83	9,704.55	67,225.13
	***-1794		40.00	O-A	Back injury						
Carson, Karen	4A221200T52-0001	-853		O-A	WC/MC WCIN 11/29/2022 ffields		2,641.59	45,983.10	22,517.85	18,915.94	90,058.48
	***-2816		115.00	VA	Other vehicle coming from opposite direc						
Butler, Elizabeth L.	A985300672-0001-01	-853		C-A	WC/MC WCIN 01/27/2009 ffields		18,742.32	38,432.29	11,170.07	0.00	68,344.68
	***-4924		156.00	VA	Neck strain and concussions to arms/legs						
Butler, Katherine	4A2308XZLS-0001	-853		O-A	WC/MC WCIN 08/28/2023 ffields		17,861.44	19,970.87	9,418.61	15,416.51	62,667.43
	***-1738		77.00	VA	ee was walking quickly, rounded a corner						
Carr, Dimonte	4A2212GHWS-0001	-853		O-A	WC/MC WCIN 12/14/2022 ffields		2,895.57	27,363.69	27,603.19	7,284.01	65,147.46
	***-1794		40.00	O-A	Back injury						
Carson, Karen	4A221200T52-0001	-853		O-A	WC/MC WCIN 11/29/2022 ffields		2,641.59	45,983.10	22,517.85	18,915.94	90,058.48
	***-2816		115.00	VA	The employee was standing in a chair att						
COOBS, MARY	30180259936-0001	-853		C-A	WC/MC WCIN 05/24/2018 ffields		7,578.90	36,232.90	10,184.25	0.00	53,996.05
	***-6923		90.00	C-A	Right ankle fracture						
DANIELS, SHAWN	3013134532-0001	-853		C-A	WC/MC WCIN 11/12/2013 ffields		161,562.33	40,635.22	6,867.46	0.00	209,065.01
	***-2799		580.00	VA	Strain to shoulder injury						
DUKE, LINDA C.	4A2206J32T-0001	-853		O-A	WC/MC WCIN 06/14/2022 acrosaby0		13,395.17	35,517.20	13,877.68	19,520.40	82,410.45
	***-8457		114.00	VA	Left knee, left ankle and left foot. S						
DUNCAN, S MICHELE	30100946171-0001	-853		O-A	WC/MC WCIN 09/02/2010 ffields		0.00	146,900.19	11,311.18	201,424.52	360,235.89
	***-5577		0.00	O-A	respiratory						
FRANZ, MAUREEN	30177405041-0001	-853		C-A	WC/MC WCIN 02/20/2017 ffields		30,073.54	13,778.48	11,310.68	0.00	55,162.70
	***-9359		265.00	VA	EE SUSTAINED A RIGHT HAND INJURY/FRACTU						
GIBSON, EUGENE N.	30130720463-0001	-853		C-A	WC/MC WCIN 06/24/2013 ffields		39,241.19	9,689.62	4,125.99	0.00	53,056.80
	***-5243		840.00	C-A	INJURY TO ANKLE KNEE AND BACK.						
GILCHRIST, DONALD D.	75500140020070001-853	-853		C-A	WC/MC WCIN 07/12/2006 ahsreynol		15,762.56	44,697.61	0.00	0.00	60,460.17
	***-6145		154.00	VA	EMPLOYEE WAS STRIPPING CLASSROOM FLOOR A						
Gillen, Bridget	4A2210NYM9-0001	-853		O-A	WC/MC WCIN 10/21/2022 ffields		10,535.23	68,982.42	16,663.77	8,074.60	104,256.02
	***-2056		76.00	VA	Student was pulling on the ER right arm						
GRIFFIN, MELODIE	30177172167-0001	-853		C-A	WC/MC WCIN 01/06/2017 ffields		3,984.00	45,971.35	12,375.43	0.00	62,330.78
	***-0303		34.00	C-A	Strain to right shoulder and arm						
HAMILTON, KISHA	30193536095-0001	-853		C-A	WC/MC WCIN 09/19/2019 ffields		236,531.47	51,387.05	41,997.61	0.00	329,926.13
	***-8546		1758.00	VA	LEFT ELBOW CONTUSION						
Harris, Benita	4A2411F8816-0001	-853		O-A	WC/MC WCIN 11/19/2024 ffields		15,827.83	16,006.46	10,492.83	17,773.78	60,100.90
	***-4188		219.00	O-A	Left Elbow						
HICKS, DEBORAH	30142810849-0001	-853		C-A	WC/MC WCIN 09/22/2014 ffields		85,000.00	20,956.29	4,924.36	0.00	110,880.65
	***-9419		0.00	O-A	Multiple body parts & injuries, lacerati						
Holland, Phillip	4A220911NHZ-0001	-853		O-A	WC/MC WCIN 09/16/2022 ffields		30,900.40	85,411.24	28,378.20	23,118.51	167,808.35
	***-5202		531.00	VA	EE was throwing trash over the top of th						
JACKSON, NA-TASHA	30181117918-0001	-853		C-A	WC/MC WCIN 10/01/2018 ffields		79,774.32	98,487.88	32,845.37	0.00	211,107.57

LOSS 01/01/1900 - 11/18/2025
 PAYMENT_01/01/1900 - 11/18/2025 AS OF 11/18/2025
 EXAMINER
 LOSS/IND PAID
 MED PAID
 EXP/OTH PAID
 FUTURE RESERVE
 TOTAL INCURRED

CLAIMANT NAME
 CLAIM NUMBER
 SSN
 STATE LOSS DESCRIPTION
 CSTAT LINE/CVG TYPE/SUB DATE LOSS
 LOSS/DYS
 HEAD AND SHOULDER

CLAIMANT NAME	CLAIM NUMBER	SSN	STATE LOSS DESCRIPTION	CSTAT LINE/CVG TYPE/SUB DATE LOSS	LOSS/DYS	HEAD AND SHOULDER	LOSS/IND PAID	MED PAID	EXP/OTH PAID	FUTURE RESERVE	TOTAL INCURRED
Johnson, Mary L.	885302813-0001-01-853	***-**-9265	WC/MC WCIN 12/01/2008 ffields	C-A	977.00	WC/MC WCIN 12/01/2008 ffields	14,016.23	236,747.09	48,670.63	0.00	299,433.95
Johnson, Paulette	4A2208YMKH-0001-853	***-**-9088	WC/MC WCIN 07/18/2022 ffields	VA	308.00	WC/MC WCIN 07/18/2022 ffields	26,383.26	52,331.48	17,238.37	0.00	95,953.11
Kearney, Tameika	4A2209T7J57-0001-853	***-**-7566	WC/MC WCIN 08/29/2022 ffields	C-A	402.00	WC/MC WCIN 08/29/2022 ffields	21,622.88	49,295.79	28,970.20	0.00	99,888.87
KWIGHT, JOHNNIE	30154801545-0001-853	***-**-4787	WC/MC WCIN 10/26/2015 ffields	O-A	369.00	WC/MC WCIN 10/26/2015 ffields	126,748.80	76,358.80	32,644.52	29,828.17	265,580.29
LASSITER, BERNICE	30180035043-0001-853	***-**-0136	WC/MC WCIN 04/19/2018 ffields	C-A	2859.00	WC/MC WCIN 04/19/2018 ffields	32,930.09	51,261.49	16,477.86	0.00	100,669.44
Lee-Jones, Sharon	4A2309XXSH7-0001-853	***-**-3005	WC/MC WCIN 09/28/2023 scroaby0	O-A	1697.00	WC/MC WCIN 09/28/2023 scroaby0	21,219.45	17,684.84	11,198.73	30,141.83	80,244.85
LIGON, VIRGINIA	4020241000-0001-853	***-**-4557	WC/MC WCIN 11/24/2020 ffields	C-A	147.00	WC/MC WCIN 11/24/2020 ffields	3,695.25	32,709.71	16,091.06	0.00	52,496.02
LINDEMANN, ROBERT	30153543173-0001-853	***-**-9862	WC/MC WCIN 02/04/2015 ffields	C-A	91.00	WC/MC WCIN 02/04/2015 ffields	43,576.34	27,872.88	10,779.95	0.00	82,229.17
McIvor, Lisa R.	4A2305FR902-0001-853	***-**-5681	WC/MC WCIN 05/12/2023 ffields	VA	214.00	WC/MC WCIN 05/12/2023 ffields	1,656.62	45,389.29	18,205.32	15,539.58	80,790.81
Meissel, India S.	A985307955-0001-01-853	***-**-0162	WC/MC WCIN 11/16/2009 ffields	VA	17.00	WC/MC WCIN 11/16/2009 ffields	511.40	111,803.03	21,385.64	0.00	133,700.07
MILLER, MELISSA A.	755001015020070003-853	***-**-7793	WC/MC WCIN 02/08/2007 ffields	C-A	4.00	WC/MC WCIN 02/08/2007 ffields	55,842.28	118,081.35	45,285.76	0.00	219,209.39
Moore, Kimblynn	4A2208QVBO-0001-853	***-**-0666	WC/MC WCIN 08/02/2022 ffields	VA	179.00	WC/MC WCIN 08/02/2022 ffields	0.00	42,546.85	24,755.67	0.00	67,302.52
MOORE-ASKEM, DEBORAH	755001070020070002-853	***-**-5432	WC/MC WCIN 09/26/2006 ffields	C-A	0.00	WC/MC WCIN 09/26/2006 ffields	67,498.16	113,353.12	23,098.22	5,344.10	209,293.60
Norfleet, Lori	4A2301KD630-0001-853	***-**-4920	WC/MC WCIN 01/17/2023 ffields	O-A	257.00	WC/MC WCIN 01/17/2023 ffields	5,426.35	27,892.99	27,701.61	0.00	60,960.95
NORMAN, ELIZABETH	30153545671-0001-853	***-**-2113	WC/MC WCIN 02/24/2015 ffields	O-A	90.00	WC/MC WCIN 02/24/2015 ffields	8,723.84	70,509.97	16,092.58	6,254.24	101,580.63
PRESSON, GAIL R.	30121233330-0001-853	***-**-2113	WC/MC WCIN 12/03/2012 ffields	VA	90.00	WC/MC WCIN 12/03/2012 ffields	467.50	49,145.02	10,537.40	0.00	60,149.92
RASBERRY, DEBORAH	30120160775-0001-853	***-**-3524	WC/MC WCIN 01/26/2012 ffields	C-A	14.00	WC/MC WCIN 01/26/2012 ffields	0.00	57,703.38	7,439.12	0.00	65,142.50
Riddick, Cheryl	4A2405KP597-0001-853	***-**-2839	WC/MC WCIN 05/16/2024 ffields	VA	0.00	WC/MC WCIN 05/16/2024 ffields	25,517.00	33,247.80	11,666.02	6,648.08	77,078.90
SAUNDERS, CYNTHIA	30191850001-0001-853	***-**-7018	WC/MC WCIN 01/04/2019 ffields	VA	133.00	WC/MC WCIN 01/04/2019 ffields	1,425.52	46,792.57	22,285.79	22,122.89	92,626.77
Shelton, Christopher R.	755001010020070004-853	***-**-8251	WC/MC WCIN 12/01/2006 ffields	O-A	28.00	WC/MC WCIN 12/01/2006 ffields	46,387.15	164,137.29	24,262.32	0.00	234,786.76
SILVER, DERRICK	30155016667-0001-853	***-**-8108	WC/MC WCIN 12/10/2015 ffields	C-A	838.00	WC/MC WCIN 12/10/2015 ffields	21,287.59	67,311.68	24,652.09	0.00	113,251.36
Small, Deagra	4A2402X907D-0001-853	***-**-1106	WC/MC WCIN 02/27/2024 ffields	VA	854.00	WC/MC WCIN 02/27/2024 ffields	7,565.58	34,836.92	10,247.87	15,984.81	68,635.18
SMITH, MARY	30166639085-0001-853	***-**-7212	WC/MC WCIN 10/05/2016 ffields	O-A	149.00	WC/MC WCIN 10/05/2016 ffields	5,044.90	62,946.37	17,282.91	0.00	85,274.18
Watko, Shelly	4A2312MINTB-0001-853	***-**-7929	WC/MC WCIN 12/19/2023 ffields	VA	840.00	WC/MC WCIN 12/19/2023 ffields	2,539.44	32,101.96	20,972.41	0.00	55,613.81
WOODS, EDWARD	30193284266-0001-853	***-**-0573	WC/MC WCIN 08/12/2019 ffields	VA	56.00	WC/MC WCIN 08/12/2019 ffields	21,253.92	121,470.32	15,081.05	0.00	157,805.29

TOTAL PAID

Sedgwick Claims Management Services, Inc.

CLAIM REPORT

LOSS 01/01/1900 - 11/18/2025

PREPARED: 11/18/2025

PAYMENT 01/01/1900 - 11/18/2025 AS OF 11/18/2025

PAGE: 3

CLAIM NUMBER SSN

CSTAT LINE/CVG TYPE/SUB DATE LOSS

EXAMINER LOSS/IND PAID

EXP/OTH PAID

FUTURE RESERVE TOTAL INCURRED

CLAIM NUMBER	SSN	CSTAT LINE/CVG TYPE/SUB DATE LOSS	EXAMINER	LOSS/IND PAID	MED PAID	EXP/OTH PAID	FUTURE RESERVE	TOTAL INCURRED
		WC-IN 52	6,277,962.35	1,842,543.57	3,450,394.02	985,024.76	505,348.12	6,783,310.47
		WC TOT 52	6,277,962.35	1,842,543.57	3,450,394.02	985,024.76	505,348.12	6,783,310.47
		CLAIMS 52	6,277,962.35	1,842,543.57	3,450,394.02	985,024.76	505,348.12	6,783,310.47

