

Appendix D: Independent Consultant Proposal Submission Format

General Questionnaire Regarding Independent Consultant Qualifications

Please include complete answers to all of the following questions in your response to the Request for Proposals for the Independent Consultant in Support of the Rehabilitation Plan for California Insurance Company in Conservation. All questions must be answered.

Company:

Mailing Address:

Overnight Mailing Address:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Fax:

Primary Contact E-mail:

1. List and summarize your experience in actuarial science as applied to workers' compensation retrospective rating programs.
2. List and summarize your experience in financial management of a workers' compensation retrospective rating program.
3. List and summarize your experience with insurance-industry accounting rules and practices as they apply to the workers' compensation line of business in California.
4. Do you currently employ a person or persons with qualifications for appointment as the Claims Handling Expert, as described in the RFP and Schedule 2.6 of the Rehabilitation Plan?
 - a. If yes, list the name(s) and describe the qualifications of such person(s):
 - b. If no, list name(s) of person(s) with whom you are able to contract possessing such qualifications and describe the qualifications.
5. Do you currently employ a person or persons with qualifications for appointment as the Reserves Expert, as described in the RFP and Schedule 2.6 of the Rehabilitation Plan?
 - a. If yes, list the name(s) and describe the qualifications of such person(s):
 - b. If no, list name(s) of person(s) with whom you are able to contract possessing such qualifications and describe the qualifications.

6. Do you currently employ a person or persons who is/are familiar, or able to obtain timely familiarity, with information systems maintained by CIC sufficient to perform the duties of the Independent Consultant?
 - a. If yes, list name(s) of person(s) and describe such existing familiarity or how such familiarity will be timely obtained;
 - b. If no, list name(s) of person(s) with whom you are able to contract possessing such qualifications and describe how such familiarity will be timely obtained.
7. List (i) names of ALL personnel anticipated to work on this matter, (ii) the hourly rate of each, and (iii) attach resumes of each.
8. Have you, or any firm in which you have an employment position or an ownership interest, provided any services to CIC or an affiliate of CIC during the past seven years, whether or not before or after CIC was placed in conservation. If so, please provide complete details of such employment position or ownership interest, or such services.
9. List the names and contact information for three relevant references.
10. Set forth in detail any questions, comments, or limitations regarding your proposal or the work of the Independent Consultant.