

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF THE COUNTY OF SAN BERNARDINO  
AND RECORD OF ACTION**

May 4, 2021

**FROM**

**LEANNA WILLIAMS, Director, Department of Risk Management**

**SUBJECT**

Contracts to Provide Investigative Services for General Liability and Workers' Compensation Claims

**RECOMMENDATION(S)**

Approve five-year contracts with the following investigative service providers for the San Bernardino County's self-insured general liability and workers' compensation claims programs, in accordance with the contracted fee schedule, with no change in the estimated aggregate master contract amount of \$1,205,000 for these services, for the period of May 6, 2020 through May 5, 2025.

1. Alvin Narciso dba A.N. Investigations, LLC, **Contract No. 21-317.**
2. M. Pino & Associates, Inc., **Contract No. 21-318.**

(Presenter: LeAnna Williams, Director, 386-8621)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Operate in a Fiscally-Responsible and Business-Like Manner.**

**Improve County Government Operations.**

**FINANCIAL IMPACT**

Approval of this item will not result in any increase to the estimated aggregate cost for services, as these contracts will be added to the master contract that includes 18 investigative service contracts already approved by the Board of Supervisors on April 21, 2020 (Item No. 67) with an estimated aggregate cost of \$1,205,000 over a five year period, or \$241,000 per year. Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost), as these services will be paid from the Department of Risk Management's (DRM) self-insurance funds in accordance with the contracted fee schedule (Attachment A of the contracts). These self-insurance funds are funded by County departments and Board-Governed Special Districts via internal service rates approved annually by the Board of Supervisors (Board). Sufficient appropriation has been included in DRM's 2020-21 budget, and will be included in future recommended budgets.

**BACKGROUND INFORMATION**

DRM self-administers the San Bernardino County's (County) general liability and workers' compensation claims programs and contracts with specialized investigative service providers,

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May 4, 2021**

as required, to investigate general liability and workers' compensation cases beyond existing staff investigations. DRM does not have the staff, expertise or equipment necessary to provide these specialized services; therefore, outsourcing this function is the most efficient and economical method of expediting this unique service. Contracting with specialized providers allows DRM to more accurately forecast and control costs by using a standard, low cost fixed rate schedule.

**PROCUREMENT**

On April 21, 2020 (Item No. 67), resulting from a competitive procurement process (ePro Bid No. RMG120-RMADM-3566), the Board approved contracts with 18 investigative service firms under one master contract in an estimated aggregate amount of \$1,205,000 to provide investigative services for the period of May 6, 2020 through May 5, 2025.

On February 19, 2021, DRM released request for qualifications (RFQ) No. RMG121-RMADM-4096 to solicit proposals from additional investigative service providers to expand its use of investigators to enhance both general liability and workers' compensation claim outcomes. DRM is also looking to more evenly distribute the work based on the skills and expertise of each vendor.

The RFQ was posted on County Purchasing's Electronic Procurement Network (ePro) website and the following two vendors submitted proposals:

<b>Vendor Name</b>	<b>Location</b>
Alvin Narciso dba A.N. Investigations, LLC	Anaheim, CA
M. Pino & Associates, Inc.	Temecula, CA

An evaluation panel consisting of staff from DRM, with oversight by the Purchasing Department, evaluated the proposals on a Pass/Fail basis. The evaluation was based on compliance with RFQ requirements, qualifications and experience. Both vendors passed the evaluation, and the panel recommends contracts be awarded to both vendors.

The recommended contracts include the same guaranteed rates as the other 18 contracts and shall be effective from May 6, 2020 through May 5, 2025, with either party able to terminate the contract with 30 days written notice.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Laura L. Crane, Supervising Deputy County Counsel, 387-5449) on April 5, 2021; Purchasing Department (Bruce Cole, Supervising Buyer, 387-2148) on March 26, 2021; Finance (Monique Amis, Administrative Analyst, 387-4883) on April 9, 2021; County Finance and Administration (Kelly Welty, Deputy Executive Officer, 387-4376) on April 12, 2021; and Human Resources (Diane Rundles, Human Resources Director, 387-5572) on April 15, 2021.

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May 4, 2021**

Record of Action of the Board of Supervisors  
County of San Bernardino

**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Col. Paul Cook (Ret.)

Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: May 4, 2021



cc: Risk - Williams w/agrees  
Contractor - C/O Risk w/agree  
File - w/agree

CCM 05/10/2021