

**WHATCOM COUNTY CONTRACT
INFORMATION SHEET**

Whatcom County Contract No. _____

Originating Department:	Administrative Services
Division/Program: (i.e. Dept. Division and Program)	Human Resources (HR) / Risk Management
Contract or Grant Administrator:	Donnie LaPlante, HR Associate Manager
Contractor's / Agency Name:	Helmsman Management Services, LLC

Is this a New Contract? If not, is this an Amendment or Renewal to an Existing Contract? Yes No
 Yes No If Amendment or Renewal, (per WCC 3.08.100 (a)) Original Contract #: 202109001

Does contract require Council Approval? Yes No If No, include WCC: _____
 Already approved? Council Approved Date: _____ (Exclusions see: Whatcom County Codes 3.06.010, 3.08.090 and 3.08.100)

Is this a grant agreement? Yes No If yes, grantor agency contract number(s): _____ CFDA#: _____

Is this contract grant funded? Yes No If yes, Whatcom County grant contract number(s): _____

Is this contract the result of a RFP or Bid process? Contract _____
 Yes No If yes, RFP and Bid number(s): 21-45 Cost Center: 507300

Is this agreement excluded from E-Verify? No Yes If no, include Attachment D Contractor Declaration form.

If YES, indicate exclusion(s) below:

- Professional services agreement for certified/licensed professional.
- Contract work is for less than \$100,000.
- Contract work is for less than 120 days.
- Interlocal Agreement (between Governments).
- Contract for Commercial off the shelf items (COTS).
- Work related subcontract less than \$25,000.
- Public Works - Local Agency/Federally Funded FHWA.

Contract Amount:(sum of original contract amount and any prior amendments): \$ <u>\$173,090</u> This Amendment Amount: \$ <u>\$210,708</u> Total Amended Amount: \$ <u>\$383,798</u>	Council approval required for; all property leases, contracts or bid awards exceeding \$40,000 , and professional service contract amendments that have an increase greater than \$10,000 or 10% of contract amount, whichever is greater, except when: <ol style="list-style-type: none"> 1. Exercising an option contained in a contract previously approved by the council. 2. Contract is for design, construction, r-o-w acquisition, prof. services, or other capital costs approved by council in a capital budget appropriation ordinance. 3. Bid or award is for supplies. 4. Equipment is included in Exhibit "B" of the Budget Ordinance 5. Contract is for manufacturer's technical support and hardware maintenance of electronic systems and/or technical support and software maintenance from the developer of proprietary software currently used by Whatcom County.
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Summary of Scope: Administration of the County's self-insured Workers' Compensation Program

Term of Contract:	Six years total (2022-2027)	Expiration Date:	12/31/2027
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Contract Routing:	1. Prepared by: <u>Donnie LaPlante</u>	Date: _____
	2. Attorney signoff: <u>George Roche</u>	Date: _____
	3. AS Finance reviewed: <u>Andrew Tan</u>	Date: _____
	4. IT reviewed (if IT related): _____	Date: _____
	5. Contractor signed: _____	Date: _____
	6. Submitted to Exec.: _____	Date: _____
	7. Council approved (if necessary): _____	Date: _____
	8. Executive signed: _____	Date: _____
	9. Original to Council: _____	Date: _____

Amendment No. 1
Whatcom County Contract No. 202109001
CONTRACT BETWEEN WHATCOM COUNTY AND
Helmsman Management Services, LLC

THIS AMENDMENT is to the Contract between Whatcom County and Helmsman Management Services, LLC, dated January 1, 2022, and designated "Whatcom County Contract No. 202109001". In consideration of the mutual benefits to be derived, the parties agree to the following:

This Amendment extends the term of this Agreement for three years through December 31, 2027, as authorized by the original contract and increases the maximum consideration by \$210,708 to a total consideration of \$383,798.

This Amendment also adds the following to Compensation, Exhibit B-1:

All claims management services and standard loss analysis reports regardless of claims volume or complexity will be provided for an annual fee payable in monthly installments.

In 2025, the annual fee will be \$67,500 paid in monthly installments of \$5,625.

In 2026, the annual fee will be \$70,200 paid in monthly installments of \$5,850.

In 2027, the annual fee will be \$73,008 paid in monthly installments of \$6,084.

In addition, allocated expenses will be charged against the file upon which they are included:

- Court, trial, formal hearings and defense costs, including attorney fees
- Expenses and fees of experts
- Cost of photocopies or records from public authorities, medical facilities and state agencies
- Professional photocopy charge
- Activity investigations
- Arbitration filing fees
- Medical or consultant witness fees
- Any assessment, taxes, filing fees, cost of surety bond required by state regulatory authorities

Unless specifically amended by this agreement, all other terms and conditions of the original contract shall remain in full force and effect.

This Amendment takes effect: January 1, 2025, regardless of the date of signature.

IN WITNESS WHEREOF, Whatcom County and Helmsman Management Services, LLC, have executed this Amendment on the date and year below written.

DATED this _____ day of _____, 20_____.

Each person signing this Contract represents and warrants that he or she is duly authorized and has legal capacity to execute and deliver this Contract.

CONTRACTOR:

CONTRACTOR NAME

Emily Drew, Vice President, TPA Operations

CONTRACTOR

HELMSMAN MANAGEMENT SERVICES, LLC

ADDRESS

PO Box 2750
Portland, OR 97208

Contact Name: Lisa McMahon
Contact Phone: (253) 867-1774
Contact FAX: (253) 854-6404
Contact Email: lisam@eberlevivian.com

WHATCOM COUNTY:

Recommended for Approval:

Donnie LaPlante, HR Associate Manager

Date

Approved as to form:

George Roche, Civil Deputy Prosecuting Attorney

Date

Approved:

Accepted for Whatcom County:

By: _____
Satpal Singh Sidhu, Whatcom County Executive

Date Approved by Council: _____