



District School Board of Pasco County

20430 Gator Lane • Land O' Lakes, Florida 34638 • 813/794-2221

Heather Fiorentino, Superintendent


www.pasco.k12.fl.us

Department of Purchasing
Kendra Goodman, CPPO, CPPB, Purchasing Agent
813/794-2221 Fax: 813/794-2111
727/774-2221 TDD: 813/794-2484
352/524-2221 e-mail: kgoodman@pasco.k12.fl.us

June 1, 2010

MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPO, CPPB, Purchasing Agent 

RE: TSA Consulting Group, Inc.
Request Permission to "Piggy-Back" Seminole County School Board
RFP #102989, Tax Sheltered Annuity Consulting, Fourth Year

On June 16, 2009, official action was taken to allow the District's Employee Benefits & Risk Management Department (EBARM) to "piggy-back" the Seminole County School Board RFP for tax sheltered annuity consulting and other services. Our contract with the awardee, TSA Consulting Group (TSA), will expire on June 30, 2010.

Ms. Mary Tillman, Director of EBARM, has requested permission to piggyback this contract for the term July 1, 2010 – June 30, 2011 (see her attached memo for detailed information). Under the Seminole Schools contract, services are provided at \$5.09 per employee, however TSA has offered to hold last year's reduction in price: \$4.50 per employee. The total amount in invoices from TSA will vary, depending on the actual number of District employees at the time services are conducted.

Under DOE Rule 6A-1.012(4), the Board may make purchases at or below the unit prices in contracts awarded by other governmental agencies. TSA has agreed in writing (attached) to extend the terms of the RFP to the District. We are therefore requesting permission for this piggyback, and for permission to place a purchase order for \$42,750 (to cover 9,500 employees; amount may vary slightly at the time PO is placed) for the upcoming fiscal year. As reference, the purchase order covering fiscal year 2009-10 was \$45,000. Should you have any questions regarding this request, please feel free to contact Mary Tillman or me at your earliest convenience.

KDG/az
Attachments



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RFP #102989 SEMINOLE COUNTY SCHOOLS PIGGYBACK REQUEST RETIREMENT PLANNING COMPLIANCE SERVICES

 X Yes, I agree to extend the terms and conditions of the above-referenced RFP to the District School Board of Pasco County. The term of the contract will be July 1, 2010 – June 30, 2011.

 No, I do not agree to extend the terms and conditions of the above-referenced RFP to the District School Board of Pasco County.

COMPANY NAME: TSA Consulting Group Inc.

SIGNATURE:  DATE: 5-3-2010

PRINTED NAME/TITLE: Stephen R. Banks E-MAIL: sbanks@tsacg.com

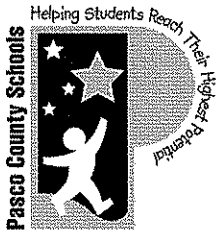
TELEPHONE W/AREA CODE: 888-777-5827 ext 104 FAX W/AREA CODE: 800-889-9736

By agreeing to renew, vendor acknowledges and agrees to be in compliance with the "Jessica Lunsford Act." Vendors conducting business with the District School Board of Pasco County (DSBPC) who will (1) be at the school when students are present, or (2) have direct contact with students, or (3) have access to or control of school funds, must be Level 2 fingerprinted by DSBPC Human Resources. If any of the above criteria apply to this contract, you must have those individuals Level 2 fingerprinted and screened by the DSBPC Human Resources Department prior to commencement of services or work, and must provide a list of employees with renewal. Please contact (813) 794-2521 to arrange for a fingerprinting appointment. Costs associated with this background screening are to borne by the vendor. You may access information regarding this law, which became effective September 1, 2005, by reviewing Sections 1012.32 and 1012.465, Florida Statutes.

The contracting company certifies, by submission and signature of this form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).

Vendor shall comply with all applicable laws, ordinances, codes and statutes of any and all local, state, or national governing bodies included within this section. Vendor shall comply with the regulations of the Civil Rights Act of 1964, in which no person in the United States shall on the grounds of race, creed, color, or national origin be excluded from participation in or be denied the proceeds of, or be subject to discrimination in the performance of this contract.

PLEASE RETURN TO:
DISTRICT SCHOOL BOARD OF PASCO COUNTY
ATTENTION: ARLENE ZIMNEY, CPPB, C.P.M., BUYER
PURCHASING DEPARTMENT
20430 GATOR LANE, LAND O' LAKES, FL 34638
(813) 794-2504 (PHONE)
(813) 794-2111 (FAX)
azimney@pasco.k12.fl.us



District School Board of Pasco County

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Heather Fiorentino, Superintendent

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Employee Benefits, Assistance & Risk Management

Mary Tillman, Director

813/ 794-2759 Fax: 813/ 794-2173

727/ 774-2759 TDD: 813/ 794-2484

352/ 524-2759 e-mail: mtillman@pasco.k12.fl.us

DATE: May 5, 2010

TO: Kendra Goodman, Purchasing Agent

FROM: Mary Tillman, Director of EBARM *Mary H. Tillman*

RE: TSA Consulting Group, Inc.

The District is currently piggy-backing the Seminole County School Board RFP for tax sheltered annuity consulting. The third year of the contract will expire on June 30, 2011.

TSA Consulting Group, Inc. (TSA) provides education, required by IRS guidelines, to employees regarding voluntary retirement (tax sheltered) accounts as well as other consulting services. Services are provided at \$4.50 annually per employee through June 30, 2011; therefore the total amount of the contract will vary, depending on the actual number of District employees at the time services are provided. Although the contract allows for an annual 3% increase, TSA has chosen not to implement the increase this year. The purchase order for 2010-11 will need to be \$42,750 to cover an estimated 9,500 employees. As reference, the purchase order for the 2009-10 fiscal year was 45,000. I, as well as the other Employee Benefits Department staff, have been very satisfied with the services from TSA. Also, I appreciate the fee reduction provided by TSA last year (\$5.24 per employee reduced to \$4.50 per employee) and the decision not to implement the allowed increase this year. TSA is a true partner to the District.

Please request permission from the Board to approve a third year term with TSA, covering July 1, 2010 through June 30, 2011. If you have any questions or need any additional information, please call me. As always, I appreciate the assistance that I have received from you and your staff during this process.

