



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, 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

November 3, 2009

MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPB, Purchasing Agent *KDG*

SUBJECT: Renewal of Fourth Year of Five-Year Contract, Invitation to Negotiate 07-006-AZ Voluntary Benefits 3rd Party Administrator/ASP Program Administrator, Sunbelt Worksite Marketing

On November 18, 2008, official action (attached) was taken to award the above-referenced Invitation to Negotiate to Sunbelt Worksite Marketing (Sunbelt.) Sunbelt provides benefits administration for the District's voluntary benefits, flexible spending accounts, COBRA and retirees. They also have developed the District's benefits management software system. Please reference the attached memo from Ms. Mary Tillman, Director of Employee Benefits, Assistance and Risk Management, for further information.

Considering services have been satisfactory, Sunbelt was contacted to verify their willingness to enter into the fourth year of the agreement. They have agreed in writing (attached) to do so. There is no cost to the Board for this contract.

At this time it is my recommendation to enter into the fourth year of the agreement with Sunbelt Worksite Marketing. The contract period will be January 1, 2010 – December 31, 2010. Should you have any questions concerning this matter, please feel free to contact Mary Tillman or me at your earliest convenience.

KDG/az

Attachments



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727/ 774-2221 TDD: 813/ 794-2484
352/ 524-2221 e-mail: kgoodman@pasco.k12.fl.us

ITN #07-006-AZ RENEWAL REQUEST VOLUNTARY BENEFITS 3rd PARTY ADMINISTRATION/ASP PROGRAM ADMINISTRATOR

Yes, I agree to renew the above-referenced ITN, under existing terms and conditions, with the District School Board of Pasco County. The term will be January 1, 2010 – December 31, 2010.

No, I do not agree to renew the above-referenced ITN with the District School Board of Pasco County.

COMPANY NAME: Sunbelt Worksite Marketing

SIGNATURE: *Spencer Vice* DATE: 10/9/09

PRINTED NAME/TITLE: Spencer Vice, Pres E-MAIL: svice@sunbelt.newsouth.net

TELEPHONE W/AREA CODE: 863 967 8045 FAX W/AREA CODE: 863 967 3848

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

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638 • 813/ 794-2000

Heather Fiorentino, Superintendent

www.pasco.k12.fl.us

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: October 5, 2009

TO: Kendra Goodman, Purchasing Agent

FROM: Mary Tillman, Director of Employee Benefits *Mary H. Tillman*

RE: 2010 Renewal for Sunbelt Worksite Marketing, Inc.

On August 1, 2006, RFP 07-006-AZ for Voluntary Benefits Administrator was awarded to Sunbelt Worksite Marketing Inc. to provide voluntary benefits; flexible spending account, COBRA and retiree benefits administration; and the development of a benefits management software system. The District is currently in the third year of the five year contract, which is renewable annually upon mutual consent, and will expire on December 31, 2009.

The services provided by Sunbelt Worksite Marketing Inc. have been satisfactory. Sunbelt Worksite Marketing Inc. has agreed in writing to renew the contract for 2010 under the same terms and conditions.

Please request permission from the Board to approve this renewal. 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.



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November 18, 2008

MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPB, Purchasing Agent 

SUBJECT: Renewal of Third Year of Five-Year Contract, Invitation to Negotiate 07-006-AZ Voluntary Benefits 3rd Party Administrator/ASP Program Administrator, Sunbelt Worksite Marketing

On November 6, 2007, official action (attached) was taken to award the above-referenced Invitation to Negotiate to Sunbelt Worksite Marketing. Sunbelt provides benefits administration for the District's voluntary benefits, flexible spending accounts, COBRA and retirees. They also have developed the District's benefits management software system. Please reference the attached memo from Ms. Mary Tillman, Director of Employee Benefits, for further information.

Considering services have been satisfactory, Sunbelt was contacted to verify their willingness to enter into the third year of the agreement. They have agreed in writing (attached) to do so. There is no cost to the Board for this contract.

At this time it is my recommendation to enter into the third year of the agreement with Sunbelt Worksite Marketing. The contract period will be January 1, 2009 – December 31, 2009. Should you have any questions concerning this matter, please feel free to contact Mary Tillman or me at your earliest convenience.

KDG/az

Attachments



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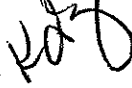
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October 23, 2007

MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPB, Purchasing Agent 

SUBJECT: Renewal of Second Year of Five-Year Contract, Invitation to Negotiate 07-006-AZ Voluntary Benefits 3rd Party Administrator/ASP Program Administrator, Sunbelt Worksite Marketing

On August 1, 2006, official action (attached) was taken to award the above-referenced Invitation to Negotiate to Sunbelt Worksite Marketing. Sunbelt provides benefits administration for the District's voluntary benefits, flexible spending accounts, COBRA and retirees. They also have developed the District's benefits management software system. Please reference the attached memo from Ms. Mary Tillman, Director of Employee Benefits, for further information.

Considering services have been satisfactory, Sunbelt was contacted to verify their willingness to enter into the second year of the agreement. They have agreed in writing (attached) to do so. There is no cost to the Board for this contract.

At this time it is my recommendation to enter into the second year of the agreement with Sunbelt Worksite Marketing. The contract period will be January 1, 2008 – December 31, 2008. Should you have any questions concerning this matter, please feel free to contact Mary Tillman or me at your earliest convenience.

KDG/az

Attachments

District School Board
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NOV 06 2007

Board Approved

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of Pasco County

NOV 1 8 2007

Board Approved

District School Board of Pasco County

Bid Recommendation

ITN Title	Voluntary Benefits 3 rd Party Administrator/ASP Program Administrator		Number of Vendors Notified	853
ITN Number	07-006-AZ		Number of Proposals Distributed	35
Date Solicited	May 9, 2006		Number of Vendors Proposing	7
Date Opened	June 28, 2006		Number of Formal "No Bid" Responses	2
Date Board Presentation	August 1, 2006		Funding Source (if needed)	Internal Services
Total Savings	See below		Grand Total of Proposal	No cost to Board anticipated

Recommendation: Recommend acceptance of proposal from Sunbelt Worksite Marketing per attached tabulations of proposals and site visits, with permission to negotiate final contract. If negotiations with the top-ranked firm are not successful, we are requesting permission to negotiate, in turn, with the second and third-ranked firms, Aon Consulting and Fringe Benefits Management Company.

No cost to the Board for this program is anticipated at this time. As it is our intention to poll the Board for final approval of the contract some time during the week of August 28, 2006, any minimal customization costs, with funding sources, will be identified for the Board's approval at that time.

Term of Contract: Five-year contract, renewable annually based upon the mutual agreement of both parties. First year term is January 1, 2007 – December 31, 2007.

Notations and Exceptions: On May 2, 2006, official action (attached) was taken to permit Employee Benefits and Risk Management (EBARM) to issue an Invitation to Negotiate (ITN) for the above-referenced services. The Evaluation Committee noted below scored compliant proposers according to criteria developed and weighted by the Committee, and outlined in the ITN document. Based on the average of the readers' scores for each criteria, the proposers were ranked highest to lowest (see attached). Per the procedures outlined in the ITN, scores then returned to zero (0) for the top three (3) firms. Sunbelt, Fringe Benefits Management Co., and Aon were visited between July 20 – 24, 2006, and were ranked and scored again by the Site Visit Committee outlined below.

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of Pasco County

NOV 06 2007

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NOV 18 2006

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AUG 1 2006

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Notations and Exceptions, continued:

On July 25, 2006, the Insurance Committee recommended acceptance of the proposal by the highest ranked firm, Sunbelt Worksite Marketing. It is EBARM's intention to work towards internet-based benefits enrollment for all District employees in time for 2007 open enrollment, with benefits administration to follow after January 1, 2007. Employees will be offered the equivalent package of products we have in place with the current provider, Fringe Benefits Management Co., at pricing comparable with the current structure.

It is expected that implementation of the internet based benefits enrollment and benefits administration software programs will result in improved services to Board employees, both during open enrollment and during the remainder of the year. The open enrollment process will be simplified, since benefits will be more fully explained and the costs associated with the benefits will be very explicit. During the remainder of the year, employees will have access to this system to review benefit information.

Cost savings: This implementation will result in monetary savings in terms of hundreds of man-hours in the EBARM, Information Services and Payroll departments. Once fully implemented, the internet based benefits enrollment software should save over 500 hours of overtime during open enrollment.

Evaluation Committee:

Mary Tillman, Director of EBARM
Thomas Learn, Supervisor of Computer Services
Kevin Shibley, Supervisor of Employee Relations
Patricia Bartz, Employee Benefits Specialist
James Ciadella, USEP Representative
Cheryl Ganci, Employee Benefits Specialist
Judith Zollo, Payroll Coordinator

Site Visit Committee:

Mary Tillman, Director of EBARM
Patricia Bartz, Employee Benefits Specialist
Jennifer Croteau, Information Systems Analyst
Cheryl Ganci, Employee Benefits Specialist
Judith Zollo, Payroll Coordinator
Mina Kaeding, Buyer (non-voting)

Bids Prepared By:

Arlene Zimney, CPPB, C.P.M., Buyer

Reviewed and Authorized By:

Kendra Goodman, CPPB, Purchasing Agent

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AUG 1 2005

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DISTRICT SCHOOL BOARD OF PASCO COUNTY ITN TABULATION

Date of Opening: June 28, 2006 @ 2:30 pm					
Voluntary Benefits 3rd Party Admin./ASP Admin.	Gehring Group 11505 Fairchild Gardens Ave, Ste 202	Sunbelt Worksite Marketing PO Box 1287	Wallace Welch & Willingham Inc. PO Box 35020		
ITN 07-006-AZ	Palm Beach Gardens, FL 33410	Auburndale, FL 33823	St. Petersburg, FL 33733		
*SCORES TO DETERMINE SITE VISITS**	33410	33823	33733		
Experience	7.84	7.95	6.53		
Customer Service	14.94	15.45	14.43		
Benefits Package	13.09	14.85	13.74		
Technology	15.01	13.99	14.17		
Benchmark Pricing Structure	5.72	17.96	10.61		
References	9.64	9.31	9.30		
Total	66.24	79.51	68.78		

Ranking order to determine site visits:
 1) Sunbelt Worksite Marketing
 2) Fringe Benefits Mgmt Co.
 3) Aon Consulting

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NOV 18 2006

Board Approved

District School Board of Pasco County

NOV 06 2007

Board Approved