



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: Third-Year Renewal of Five-Year Agreement
RFP 08-006-AZ, Voluntary Investment Products

On December 16, 2008, official action (attached) was taken to renew the above-referenced RFP for voluntary investment products to ten (10) separate providers, as follows:

Ameriprise Financial Services
AXA Equitable
HoraceMann
ING
The Legend Group

Lincoln Investment Planning
MetLife Resources
Suncoast Federal Credit Union
Valic
Waddell & Reed

The RFP provides a mix of products and services to employees for investments, education and administrative services with regard to the District's Internal Revenue Code "IRC" Sections 403(b)/403(b)(7) Tax Sheltered Accounts and 457(b) Deferred Compensation Plans. The second-year term will expire on December 31, 2009.

Per the terms of the RFP, all firms must maintain a minimum of 75 active participant contracts per calendar year in order to retain their payroll slot. Services from all firms noted above have been satisfactory. Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management (EBARM) has requested renewal of the RFP for the term January 1, 2010 – December 31, 2010 with the companies noted above. Please see her memo, attached, for further information.

These firms were contacted to determine their willingness to enter into the third year of the RFP, under existing terms and conditions. All have agreed in writing (attached) to do so. There is no cost to the Board for this program, as the participating firms are assessed a fee of \$1000 per year plus a per participant fee of \$6.00. The RFP is a five-year contract, renewable annually at the mutual agreement of the parties. We are recommending renewal of this RFP for the third-year term with the companies noted above. Should you have any questions or concerns, please contact Ms. Tillman or me at your earliest convenience.

KDG/az
Attachments



District School Board of Pasco County

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

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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: October 19, 2009

TO: Kendra Goodman, Purchasing Agent

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

RE: 2009 Renewal for Voluntary Investment Products

On August 21, 2007, RFP 08-006-AZ for Voluntary Investment Products was awarded to the following providers:

- | | |
|----------------------------------|--|
| 1) AIG VALIC | 8) The Legend Group |
| 2) ING | 9) Great American Financial Resources* |
| 3) Horace Mann | 10) The Hartford* |
| 4) Suncoast Schools Credit Union | 11) Waddell & Reed |
| 5) MetLife | 12) Life of the Southwest* |
| 6) Lincoln Investment Planning | 13) Symetra Financial* |
| 7) AXA Equitable | 14) Ameriprise |

The District is currently in the second year of the five year contract, which is renewable annually upon mutual consent.

* Contracts for Great American Financial Resources, The Hartford, Symetra, Financial and Life of the Southwest were non-renewed as of December 31, 2009 due to insufficient number of participants.

The services provided by all of the remaining providers have been satisfactory and I recommend renewing the contracts for 2010 with AIG VALIC, ING, Horace Mann, Suncoast Schools Credit Union, MetLife, Lincoln Investment Planning, AXA Equitable, The Legend Group, Waddell & Reed and Ameriprise.

All of the providers listed above have agreed in writing to renew the contract for 2010 under the same terms and conditions.

Please request permission from the Board to approve these renewals. 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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RFP #08-006-AZ RENEWAL REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM

Yes, I agree to renew the above-referenced RFP, 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 RFP with the District School Board of Pasco County.

COMPANY NAME: Ameriprise Financial Services

SIGNATURE: Cheryl M. Burbano DATE: 9/25/09

PRINTED NAME/TITLE: Cheryl M. Burbano -MAIL: cheryl.m.burbano@amf.com

TELEPHONE W/AREA CODE: 813-994-1190 FAX W/AREA CODE: 813-994-1334

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



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

COMPANY NAME: AXA Equitable

SIGNATURE:  DATE: October 9, 2009
PRINTED NAME/TITLE: Jennifer Wong-Hernandez Assistant Vice President E-MAIL: jennifer.wong-hernandez@axa-equitable.com

TELEPHONE W/AREA CODE: 201-583-2216 FAX W/AREA CODE: 201-583-2048

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COMPANY NAME: Horace Mann

SIGNATURE: Tricia Seifert DATE: 10/1/09

PRINTED NAME/TITLE: Tricia Seifert, AVP E-MAIL: Seifert1@horacemann.com

TELEPHONE W/AREA CODE: 866-999-1945, Opt 1 FAX W/AREA CODE: 800-217-7351

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COMPANY NAME: ING

SIGNATURE: *Pamela Mulvey Barcia* DATE: October 8, 2009

PRINTED NAME/TITLE: Pamela MULVEY BARCIA E-MAIL: Pamela.Mulvey@us.ing.com

Vice President
TELEPHONE W/AREA CODE: 860.580.1641 FAX W/AREA CODE: 860.580.1665

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

COMPANY NAME: The Legend Group

SIGNATURE: _____

DATE: 9-28-09

PRINTED NAME/TITLE: Glenn T. Ferris

E-MAIL: gferris@legendgroup.com

TELEPHONE W/AREA CODE: 561-694-0110

FAX W/AREA CODE: 561-626-9436

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COMPANY NAME: Lincoln Investment Planning

SIGNATURE: [Signature] DATE: 10/12/09

PRINTED NAME/TITLE: Stephen Quikel, VP E-MAIL: erservice@lincolninvestment.com

TELEPHONE W/AREA CODE: 215-887-8111 FAX W/AREA CODE: 215-885-8113

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COMPANY NAME: MetLife Resources

SIGNATURE: [Signature] DATE: 9/28/09

PRINTED NAME/TITLE: OCTAVIO SANTOS JR. REGIONAL MANAGING DIRECTOR E-MAIL: osantos@metlife.com

TELEPHONE W/AREA CODE: 407-333-3078 FAX W/AREA CODE: 407-333-3346

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COMPANY NAME: Suncoast Federal Credit Union (Members Trust)

SIGNATURE: *Roy Echols* **DATE:** 9-28-2009

PRINTED NAME/TITLE: ROY ECHOLS / Vice President **E-MAIL:** roy.echols@suncoastfcu.org

TELEPHONE W/AREA CODE: (813) 246-5211 **FAX W/AREA CODE:** 866-409-4478
Ext. 86727

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COMPANY NAME: Valic

SIGNATURE: Todd Buchanan DATE: SEPT. 28, 2009

PRINTED NAME/TITLE: Todd Buchanan E-MAIL: todd.buchanan@valic.com
SR. REGIONAL V.P.

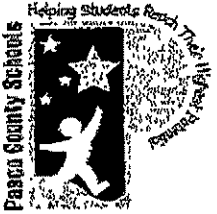
TELEPHONE W/AREA CODE: 813-269-3372 FAX W/AREA CODE: 813-265-3524

By agreeing to renew, vendor acknowledges and agrees to be in compliance with the "Jessica Lumsford 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

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

FLORIDA IBC 403(b) MODEL PLAN RENEWAL REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM

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

*As of September 10, 2009, the terms and conditions of the IBC 403(b) Model Plan and Waddell & Reed Advisors Retirement Plan on the Nationwide platform apply.

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

COMPANY NAME: Waddell & Reed Inc.

SIGNATURE: *Debra K. Schmidt*

DATE: September 25, 2009

PRINTED NAME/TITLE: Debra K. Schmidt, Vice President Retirement Plan Sales

E-MAIL: dschmidt@waddell.com

TELEPHONE W/AREA CODE: (913) 236-1517

FAX W/AREA CODE: (913) 236-2552

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December 16, 2008

MEMORANDUM

TO: Honorable School Board Members

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

SUBJECT: Second Year Renewal of Five-Year Agreement
RFP 08-006-AZ, Voluntary Investment Products

On August 21, 2007, official action (attached) was taken to award the above-referenced RFP for voluntary investment products to fourteen (14) separate providers, as follows:

AIG Valic
ING
Horace Mann
MetLife
Lincoln Investment Planning
AXA Equitable
Ameriprise

The Legend Group
Waddell & Reed I
Suncoast Schools Credit Union
Great American Financial Resources
The Hartford
Symetra Financial
Life of the Southwest

The RFP provides a mix of products and services to employees for investments, education and administrative services with regard to the District's Internal Revenue Code "IRC" Sections 403(b)/403(b)(7) Tax Sheltered Accounts and 457(b) Deferred Compensation Plans. The first-year term will expire on December 31, 2008.

Per the terms of the RFP, all firms must maintain a minimum of 75 active participant contracts per calendar year in order to retain their payroll slot. Services from all firms noted above have been satisfactory, with the exception of the following companies, which have not maintained the required number of active participants: Great American Financial Resources, The Hartford, Life of the Southwest, and Symetra Financial. Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management (EBARM) has requested renewal of the RFP for the term January 1, 2009 – December 31, 2009 with the remaining ten (10) compliant companies (noted in **bold type**, above.) Please see her memo, attached, for further information.

The ten (10) compliant firms were contacted to determine their willingness to enter into the second year of the RFP, under existing terms and conditions. All have agreed in writing (attached) to do so. There is no cost to the Board for this program, as the participating firms are assessed a fee of \$1000 per year plus a per participant fee of \$6.00. The RFP is a five-year contract, renewable annually at the mutual agreement of the parties. We are therefore recommending renewal of this RFP for the second-year term with the ten (10) companies noted in bold type above. Should you have any questions or concerns, please contact Ms. Tillman or me at your earliest convenience.

KDG/az
Attachments

District School Board
of Pasco County

DEC 16 2008

