



# District School Board of Pasco County

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

Heather Fiorentino, Superintendent

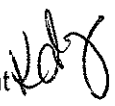
[www.pasco.k12.fl.us](http://www.pasco.k12.fl.us)

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](mailto:kgoodman@pasco.k12.fl.us)

May 3, 2011

## MEMORANDUM

**TO:** Honorable School Board Members

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

**SUBJECT:** Request Permission to Piggy-Back Duval County School Board  
RFP 2-11/LG, Tax Sheltered Annuity Consulting, TSA Consulting Group  
First Year

On June 16, 2009, official action was taken to allow the District's Employee Benefits & Risk Management Department (EBARM) to piggyback 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, 2011.

As the Seminole Schools' RFP is expiring, we have identified another governmental entity, Duval County School Board, which has an RFP for these services. All documentation regarding this contract is on file in the Purchasing Department. Ms. Mary Tillman, Director of EBARM, has requested permission to piggyback this new contract for the term July 1, 2011 – June 30, 2012. Please see her memo, attached, for detailed information regarding the services TSA Consulting provides to the District.

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 Duval Schools' RFP to the District. We are therefore requesting permission for this piggyback, and for permission to place a purchase order for \$44,080 (estimated cost, to cover 9,500 employees; amount may vary slightly at the time the PO is placed) for encumbrance in the next fiscal year. As reference, the purchase order covering fiscal year 2010-11 was \$42,750.

Should you have any questions regarding this request, please feel free to contact Mary Tillman or me at your earliest convenience.

KDG/az  
Attachments

Date/Time: April 27, 2011 08:47:00



## 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](http://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](mailto:mtillman@pasco.k12.fl.us)

**DATE:** May 3, 2011

**TO:** Kendra Goodman, Purchasing Agent

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

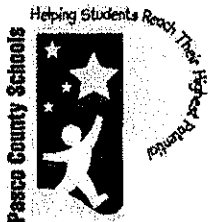
**RE:** TSA Consulting Group, Inc. Renewal

---

The Employee Benefits, Assistance & Risk Management Department is requesting a piggyback of the Duval County School Board RFP, period July 1, 2011 – June 30, 2012, for tax sheltered annuity consulting.

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 \$4.64 annually per employee, based on the appropriate "tier" for the number of Pasco employees, through June 30, 2012. 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 2011-12 will need to be \$44,080 to cover an estimated 9,500 employees. As reference, the purchase order for the 2010-11 fiscal year was \$42,750. The funding source is the Internal Service Fund. I, as well as the other Employee Benefits Department staff, have been very satisfied with the services from TSA. Also, I appreciate the decision by TSA not to implement the allowed increase this year. TSA is a true partner to the District.

Please request permission from the Board to approve this piggyback for TSA's services. 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.



# 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](http://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](mailto:kgoodman@pasco.k12.fl.us)

## PIGGYBACK REQUEST: PLAN ADMINISTRATION 403(b) DUVAL COUNTY SCHOOLS

Yes, I agree to allow the District School Board of Pasco County to piggyback the above-referenced RFP, under its existing terms and conditions. The contract term will be July 1, 2011 – June 30, 2012.

No, I do not agree to permit a piggyback off the above-referenced RFP.

COMPANY NAME: TSA Consulting Group.

SIGNATURE: Janet Williamson, VP, COO DATE: April 4, 2011

PRINTED NAME/TITLE: Janet Williamson, Chief Operations Officer E-MAIL: jwilliamson@tsacg.com

TELEPHONE W/AREA CODE: (850) 244-7306 FAX W/AREA CODE: (850) 244-7308

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](mailto:azimney@pasco.k12.fl.us)**