



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

November 2, 2010

MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPO, CPPB, Purchasing Agent 

SUBJECT: RFP 06-049-AZ, Life Insurance
One-Year Extension to Five-Year Agreement
Minnesota Life Insurance Company

On November 3, 2009, official action (attached) was taken to award the above-referenced RFP to Minnesota Life Insurance Company for life insurance (employee basic and supplemental, spouse supplemental, dependent supplemental, accidental death and dismemberment, and retiree life insurance). This RFP is a five-year contract, renewable annually by mutual consent of the parties. The fifth year of the contract is due to expire on December 31, 2010.

Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management, is requesting a one (1)-year extension to the existing contract. Per the terms of the original RFP, we are permitted to take this action, should it be in the best interest of the Board to do so. Minnesota Life has agreed in writing (attached) to the term extension, holding the same premium rate for the life and accidental death and dismemberment coverage for District employees. Please see the attached memo from Ms. Tillman for detailed information.

The cost to the Board in 2011 is estimated to be \$625,000, and will be paid out of insurance funding provided by the Board. At this time it is my recommendation to enter into this one (1)-year extension of the agreement with Minnesota Life. The contract period will be January 1, 2011 – December 31, 2011. 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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RFP 06-049-AZ TERM EXTENSION REQUEST LIFE INSURANCE

 X Yes, I agree to extend the term of the above-referenced RFP with the District School Board of Pasco County for an additional year, under existing terms and conditions. The extension term will be January 1, 2011- December 31, 2011.

 No, I do not agree to extend the term of the above-referenced RFP.

COMPANY NAME: Minnesota Life Insurance Company

SIGNATURE:  DATE: October 12, 2010

PRINTED NAME/TITLE: Brian Anderson; 2nd Vice President E-MAIL: brian.anderson@securian.com

TELEPHONE W/AREA CODE: 651-665-6308 FAX W/AREA CODE: 651-665-1541

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

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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 6, 2010

TO: Kendra Goodman, Purchasing Agent

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

RE: 2011 Extension for Minnesota Life Insurance Company

On August 16, 2005, RFP 06-049-AZ for Group Life Insurance was awarded to Minnesota Life Insurance Company for employee basic and supplemental, spouse supplemental, dependent supplemental and retiree life insurance. The District is currently in the fifth year of the five year contract, which is renewable annually upon mutual consent, and included a three year rate guarantee. On April 1, 2009, Minnesota Life decreased the Board's premium and guaranteed that rate through December 31, 2011. Because of this, it is in the Board's best interest to extend the agreement with Minnesota Life for an additional year.

The services provided by Minnesota Life have been satisfactory. Minnesota Life has agreed in writing to renew the contract for 2011 with the same premium rate for the Life and Accidental Death & Dismemberment coverage for District employees. The total cost to the District for 2011 is expected to be \$625,000. The funding source is the insurance funds provided by the Board.

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 3, 2009

MEMORANDUM

TO: Honorable School Board Members

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

SUBJECT: RFP 06-049-AZ, Life Insurance
Fifth Year of a Five-Year Agreement
Minnesota Life Insurance Company

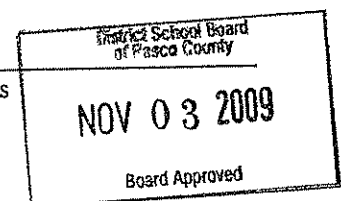
On November 18, 2008, official action (attached) was taken to award the above-referenced RFP to Minnesota Life Insurance Company for life insurance (employee basic and supplemental, spouse supplemental, dependent supplemental, accidental death and dismemberment [AD&D] and retiree life). This RFP is a five-year contract, renewable annually by mutual consent of the parties. The fourth year of the contract is due to expire on December 31, 2009.

Considering the services of the firm have been satisfactory, the vendor was contacted to verify their willingness to enter into the fifth year of the agreement. They have agreed in writing (attached) to renew the contract with the same premium rate for the life and accidental death and dismemberment coverage. The cost to the Board in 2010 is estimated to be \$645,000, and will be paid out of insurance funding. Please see the attached memo from Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management (EBARM) for additional information.

At this time it is my recommendation to enter into the fifth year of the agreement with Minnesota Life. 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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November 18, 2008

MEMORANDUM

TO: Honorable School Board Members

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

SUBJECT: RFP 06-049-AZ, Life Insurance
Fourth Year of a Five-Year Agreement
Minnesota Life Insurance Company

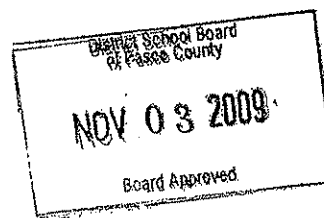
On October 2, 2007, official action (attached) was taken to award the above-referenced RFP to Minnesota Life Insurance Company for life insurance (employee basic and supplemental, spouse supplemental, dependent supplemental, accidental death and dismemberment [AD&D] and retiree life). This RFP is a five-year contract, renewable annually by mutual consent of the parties. The third year of the contract is due to expire on December 31, 2007.

Considering the services of the firm have been satisfactory, the vendor was contacted to verify their willingness to enter into the fourth year of the agreement. They have agreed in writing (attached) to do so. For the next term, Minnesota Life has agreed to a 10% premium reduction for basic life insurance for active employees and supplemental life for employees, spouses and children. This represents a savings of \$6,000 to the Board. Rates for AD&D insurance and retiree premiums will remain the same. The cost to the Board in 2009 is estimated to be \$720,090, and will be paid out of insurance funding. Please see the attached memo from Ms. Mary Tillman, Director of Employee Benefits Administration & Risk Management (EBARM) for additional information.

At this time it is my recommendation to enter into the fourth year of the agreement with Minnesota Life. 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

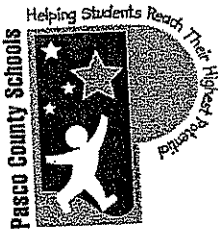
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District School Board
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September 20, 2007

MEMORANDUM

TO: Honorable School Board Members

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

SUBJECT: RFP 06-049-AZ, Life Insurance
Third Year of a Five-Year Agreement
Minnesota Life Insurance Company

On October 7, 2006 official action (attached) was taken to award the above-referenced RFP to Minnesota Life Insurance Company for life insurance (employee basic and supplemental, spouse supplemental, dependent supplemental, and retiree life). This RFP is a five-year contract, renewable annually by mutual consent of the parties. The second year of the contract is due to expire on December 31, 2007.

Considering the services of the firm have been satisfactory, the vendor was contacted to verify their willingness to enter into the third year of the agreement. They have agreed in writing (attached) to do so. The cost to the Board in 2008 is estimated to be \$625,347 (as reference, costs in 2007 YTD are \$593,596). Rates in the initial RFP have been guaranteed for a three (3)-year period. Please see the attached memo from Ms. Mary Tillman, Director of Employee Benefits Administration & Risk Management (EBARM) for additional information.

At this time it is my recommendation to enter into the third year of the agreement with the vendor noted above. 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.

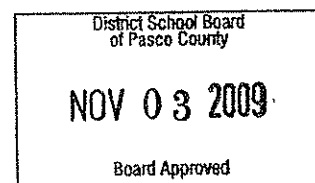
KDG/az

Attachments

District School Board
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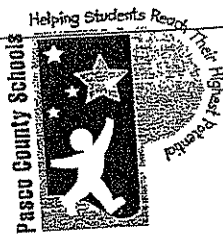
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October 4, 2006

MEMORANDUM

TO: Honorable Board Members
FROM: Kendra Goodman, CPPB, Purchasing Agent *KDG*
SUBJECT: RFP 06-049-AZ, Life Insurance
Second Year of a Five-Year Agreement
Minnesota Life

On August 16, 2005, official action (attached) was taken to award the above-referenced RFP to Minnesota Life for life insurance (employee basic and supplemental, spouse supplemental, dependent supplemental, and retiree life). This RFP is a five-year contract, renewable annually by mutual consent of the parties. The first year of the contract is due to expire on December 31, 2006.

Considering the services of the firm have been satisfactory, the vendor was contacted to verify their willingness to enter into the second year of the agreement. They have agreed in writing (attached) to do so. The cost to the Board in 2007 is estimated to be \$965,419 (as reference, costs in 2006 YTD are \$724,064). Rates in the initial RFP have been guaranteed for a three (3)-year period.

At this time it is my recommendation to enter into the second year of the agreement with the vendor noted above. The contract period will be January 1, 2007 – December 31, 2007. Should you have any questions concerning this matter, please feel free to contact Ms. Mary Tillman, Director of Employee Benefits, or me at your earliest convenience.

KDG/az

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District Wide Accreditation • Southern Association of Colleges and Schools

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Bid Recommendation

RFP Title	Life Insurance	Number of Vendors Notified	126
RFP Number	06-049-AZ	Number of Proposals Distributed	21
Date Solicited	June 23, 2005	Number of Vendors Responding	11
Date Opened	July 13, 2005	Number of Vendors Not Proposing	0
Date Board Presentation	October 4, 2005	Number of Vendors Proposing	11
Total Savings	N/A	Grand Total of Proposal	\$1,169,392.00

Recommendation: Recommend acceptance of RFP per the attached tabulation. Acceptance of Minnesota Life as the highest-ranked firm will enable the Employee Benefits and Risk Management Department to finalize life insurance information for calendar year 2006 open enrollment.

Term of Contract: This RFP is a five-year contract, renewable annually based on the mutual consent of the parties. Rates have been guaranteed for a three (3)-year period. The first year term will be January 1, 2006 – December 31, 2006.

Notations and Exceptions: Metropolitan Life Insurance Co. was disqualified at the proposal opening for failure to properly execute the signature document. Upon review after the opening, AIG Life Insurance's proposal specifically stated that they would not accept our terms and conditions, and that a separate contract would need to be negotiated. Both these proposals were therefore deemed non-responsive and were eliminated from committee consideration.

The Phase I RFP responses from the compliant proposers were independently evaluated by the Committee members noted below, with all scores being totaled and averaged. Two (2) firms were invited to interview with the committee on July 27, 2005. The firms were again scored by the committee members after the interviews, with Phase I scores weighted at 60% and Phase II scores weighted at 40%. It is the consensus of the committee that Minnesota Life be chosen to provide life insurance services for the District. Prices quoted are the same as the District is currently paying with Unum Provident Life Insurance, administered by Fringe Benefits Management Co.

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OCT 17 2006
Board Approved

District School Board
of Pasco County
OCT 04 2005
Board Approved

Date/Time: September 28, 2005 08:53:00
Board Approved

Bids Evaluated By:

Patricia Bartz, Employee Benefits Specialist
James Ciadella, USEP Representative
Patricia Howard, Employee Benefits Specialist
Michael Hudson, Employee Benefits and Risk Manager

Bids Prepared By:

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

Reviewed and Authorized By:

Kendra Goodman, CPPB, Purchasing Agent

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OCT 17 2006

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OCT 04 2005

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NOV 03 2009

Board Approved

Date/Time

DISTRICT SCHOOL BOARD OF PASCO COUNTY RFP TABULATION

Date of Opening: July 13, 2005	Aelina Life Insurance Co.	Cigna Group Insurance	Florida Combined Life Insurance Co.	The Hartford	Humana Insurance Co.	Minnesota Life
Proposal Title: Life Insurance	151 Farmington Ave.	3101 W. MLK Jr. Blvd., Ste 200	5011 Gate Pkwy, Bldg. 200, Ste 300	One Urban Ctr, 4830 W. Kennedy Blvd.	500 West Main St.	400 Robert St. N.
RFP #06-049-AZ	Hartford, CT 06156	Tampa, FL 33607	Jacksonville, FL 32256	Tampa, FL 33609	Louisville, KY 40202	St. Paul, MN 55101
BOARD MEETING OCTOBER 4, 2005						
Cost	6,860	13,880	2,208	4,432	17,776	19,440
Coverage	16,680	10,405	3,455	12,490	6,930	24,305
Service	11,795	8,320	5,540	19,440	14,575	22,915
Financial stability of Insurer	24,000	23,000	24,000	26,000	23,000	25,000
	59,115	55,905	35,203	61,362	62,281	91,660
PHASE I TOTAL	35,469	33,363	21,122	36,817	37,369	54,996
PHASE I TOTAL WEIGHTED 50%						
PHASE II (INTERVIEW) TOTAL						18,750
PHASE II TOTAL WEIGHTED 40%						7,500
GRAND TOTAL						62,496

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OCT 04 2005

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DISTRICT SCHOOL BOARD OF PASCO COUNTY RFP TABULATION

Date of Opening: July 13, 2005									
Proposal Title: Life Insurance	Standard Insurance Co.	Unicare Life & Health Insurance Co.	Unum Life Insurance Co. of America						
RFP #06-049-AZ	4350 W. Cypress St., Ste 702	6850 Versar Center Springfield, VA 22151	2211 Congress St. Portland, ME 04101						
BOARD MEETING OCTOBER 4, 2005	Tampa, FL 33607								RANKING ORDER FOR INTERVIEWS
Cost	25,000	13,328	4,992						1) Minnesota Life Ins.
Coverage	22,915	10,405	16,660						2) Standard Insurance
Service	17,355	23,610	5,958						3) Unicare
Financial stability of insurer	24,000	24,000	23,000						4) Humana
									5) Hartford
									6) Aetna
									7) Cigna
									8) Unum
									9) Florida Combined Life
PHASE I TOTAL	89,270	71,343	50,610						
PHASE I TOTAL WEIGHTED 60%	53,562	42,806	30,366						
PHASE II (INTERVIEW) TOTAL	18,750								
PHASE II TOTAL WEIGHTED 40%	7,500								
GRAND TOTAL	61,062								

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OCT 04 2005
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