



# 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)

November 2, 2010

## **MEMORANDUM**

**TO:** Honorable School Board Members

**FROM:** Kendra Goodman, CPPO, CPPB, Purchasing Agent *KDG/act*

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

On November 3, 2009, 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. The fourth year of the contract will expire on December 31, 2010.

Considering services have been satisfactory, Sunbelt was contacted to verify their willingness to enter into the fifth 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 fifth year of the agreement with Sunbelt Worksite Marketing. 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



# 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)

## ITN #07-006-AZ RENEWAL REQUEST

### VOLUNTARY BENEFITS 3<sup>rd</sup> 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 renewal period will be January 1, 2011-December 31, 2011.

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 V. Ice* DATE: 10/14/2010

PRINTED NAME/TITLE: Spencer V. Ice E-MAIL: [svice@sunbeltfl.newsouth.net](mailto:svice@sunbeltfl.newsouth.net)

TELEPHONE W/AREA CODE: 8639678045 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](mailto: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](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: October 6, 2010

TO: Kendra Goodman, Purchasing Agent

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

RE: 2011 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 fourth year of the five year contract, which is renewable annually upon mutual consent, and will expire on December 31, 2010.

The services provided by Sunbelt Worksite Marketing Inc. have been satisfactory. Sunbelt Worksite Marketing Inc. has agreed in writing to renew the contract for 2011 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.



# 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, 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)

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 3<sup>rd</sup> Party Administrator/ASP Program Administrator, Sunbelt  
Worksite Marketing

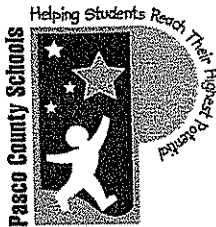
On November 18, 2008, official action (attached) was taken to award the above-referenced Invitation to Negotiate to Sunbelt Worksite Marketing (Sunbelt.) Sunbelt provides benefits administration for the District's voluntary benefits, flexible spending accounts, COBRA and retirees. They also have developed 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



# 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, 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)

November 18, 2008

## MEMORANDUM

**TO:** Honorable School Board Members

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

**SUBJECT:** Renewal of Third Year of Five-Year Contract, Invitation to Negotiate 07-006-AZ Voluntary Benefits 3<sup>rd</sup> 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.

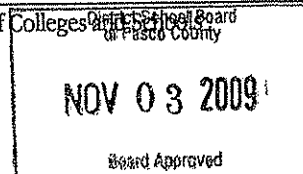
Considering services have been satisfactory, Sunbelt was contacted to verify their willingness to enter into the third year of the agreement. They have agreed in writing (attached) to do so. There is no cost to the Board for this contract.

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

District Wide Accreditation • Southern Association of Colleges and Schools



District School Board  
of Pasco County

NOV 18 2008

Board Approved



# 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, 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)

October 23, 2007

## MEMORANDUM

**TO:** Honorable School Board Members

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

**SUBJECT:** Renewal of Second Year of Five-Year Contract, Invitation to Negotiate 07-006-AZ Voluntary Benefits 3<sup>rd</sup> 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  
of Pasco County

NOV 06 2007

Board Approved

District School Board  
of Pasco County

District Wide Accreditation • Southern Association of Colleges and Schools

District School Board  
of Pasco County

NOV 03 2009

Board Approved

NOV 18 2007

Board Approved

# District School Board of Pasco County

## Bid Recommendation

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

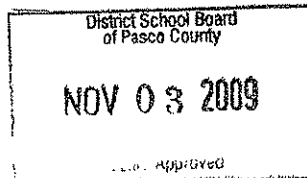
**Term of Contract:** Five-year contract, renewable annually based upon the mutual agreement of both parties. First year term is January 1, 2007 – December 31, 2007.

**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.

District School Board  
of Pasco County

NOV 06 2007

Board Approved



District School Board  
of Pasco County

NOV 18 2008

Board Approved

District School Board  
of Pasco County

AUG 1 2006

Board Approved

**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 *KDG/AZ*

District School Board  
of Pasco County

NOV 06 2007

Board Approved

District School Board  
of Pasco County

NOV 03 2009

Board Approved

District School Board  
of Pasco County

NOV 18 2008

Board Approved

District School Board  
of Pasco County

AUG 1 2005

Board Approved



DISTRICT SCHOOL BOARD OF PASCO COUNTY ITN TABULATION

Date of Opening: June 28, 2006 @ 2:30 pm			
Voluntary Benefits 3rd Party Admhn./ASP Admhn.	Aon Consulting Inc.	Fringe Benefits Management Co.	Sunbelt Worksite Marketing
	7650 W. Courtney Campbell Cse.	3101 Sessions Rd. Tallahassee, FL 32303	PO Box 1287 Auburndale, FL 33823
ITN 07-006-AZ - SITE VISIT SCORES			
**BOARD MEETING AUGUST 1, 2006**	Tampa, FL 33607		
Online/web enrollment	14.80	12.00	13.20
Benefits administration	27.60	11.60	23.40
Payroll/HR interface	16.40	13.00	16.40
Customer service	6.20	16.60	18.40
Technology	14.20	8.60	12.40
<b>Total</b>	<b>79.20</b>	<b>61.80</b>	<b>83.80</b>

District School Board  
of Pasco County  
NOV 06 2007  
Board Approved

District School Board  
of Pasco County  
NOV 03 2009  
Board Approved

District School Board  
of Pasco County  
NOV 18 2008  
Board Approved

District School Board  
of Pasco County  
AUG 1 2006  
Board Approved

DISTRICT SCHOOL BOARD OF PASCO COUNTY ITN TABULATION

Date of Opening: June 28, 2006 @ 2:30 pm				
Voluntary Benefits 3rd Party Admin./ASP Admin.	American Family Life Assurance Co. (AFLAC)	Aon Consulting Inc.	Colonial Life & Accident Ins. Co.	Fringe Benefits Mgmt. Co.
ITN 07-006-AZ	1932 Wynnnton Rd.	7650 W. Courtney Campbell Cse.	1200 Colonial Life Blvd.	3101 Sessions Rd.
	Columbus, GA 31999	Tampa, FL 33607	Columbia, SC 29210	Tallahassee, FL 32303
<b>*SCORES TO DETERMINE SITE VISITS**</b>				
Experience	7.61	9.86	6.77	8.940
Customer Service	11.82	13.49	11.99	15.190
Benefits Package	12.25	16.57	11.27	16.190
Technology	12.54	15.86	13.49	10.150
Benchmark Pricing Structure	13.06	8.17	6.54	17.550
References	9.24	10.00	9.55	9.280
<b>Total</b>	<b>66.52</b>	<b>73.95</b>	<b>59.61</b>	<b>77.300</b>

District School Board  
of Pasco County  
NOV 06 2007  
Board Approved

District School Board  
of Pasco County  
NOV 03 2009  
Board Approved

District School Board  
of Pasco County  
NOV 18 2008  
Board Approved

District School Board  
of Pasco County  
AUG 1 2006  
Board Approved

DISTRICT SCHOOL BOARD OF PASCO COUNTY ITN TABULATION

Date of Opening: June 28, 2006 @ 2:30 pm					
Voluntary Benefits 3rd Party Admhn./ASP Admhn.	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		
<b>*SCORES TO DETERMINE SITE VISITS**</b>					
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		
<b>Total</b>	<b>66.24</b>	<b>79.51</b>	<b>68.78</b>		

Ranking order to determine site visits:

- 1) Sunbelt Worksite Marketing
- 2) Fringe Benefits Mgmt. Co.
- 3) Aon Consulting
- 4) Wallace Welch & Willingham
- 5) AFLAC
- 6) Gehring Group
- 7) Colonial Life

District School Board of Pasco County

AUG 1 2006

Board Approved

District School Board of Pasco County

NOV 18 2006

Board Approved

District School Board of Pasco County

NOV 03 2009

Board Approved

District School Board of Pasco County

NOV 06 2007

Board Approved