



## 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  
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June 19, 2012

### MEMORANDUM

**TO:** Honorable School Board Members

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

**RE:** Second-Year Renewal of a Three-Year Contract  
Request Permission to Piggyback Duval County School Board  
RFP #2-11/LG, Tax Sheltered Annuity Consulting, awarded to TSA Consulting Group

The District School Board of Pasco County currently is utilizing Duval County School Board's RFP #2-11/LG: Tax Sheltered Annuity Consulting which is set to expire on June 30, 2012. Services are provided at \$4.64 annually per employee, based on the appropriate "tier" for the number of Pasco employees, through June 30, 2013. We are requesting to continue to utilize Duval County School Board's RFP #2-11/LG: Tax Sheltered Annuity Consulting which has been renewed for the second year and covers the contract period from July 1, 2012 through June 30, 2013.

The Employee Benefits, Assistance & Risk Management Department is recommending that the District continue to piggyback this RFP, for the term July 1, 2012 – June 30, 2013. Please see the attached memo from Mrs. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management, for detailed information. TSA Consulting Group has agreed in writing (attached) to extend the District all the terms, conditions, and pricing of the Duval County School Board's RFP. As you may recall, the District is permitted to piggyback other agencies bids or RFPs when it is in their best interest to do so, under DOE Rule 6A-1.012(6).

We are requesting permission to piggyback the Duval County School Board's RFP #2-11/LG contract for the second year term of July 1, 2012 through June 30, 2013 and to place a purchase order for \$43,152 (estimated cost, to cover 9,300 employees; amount may vary slightly at the time the PO is placed) for the encumbrance in the next fiscal year. Please contact Mary Tillman or me at your earliest convenience if you have any questions or concerns.

KDG/amj  
Attachments

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District Wide Accreditation • Southern Association of Colleges and Schools

Date/Time: June 13, 2012 08:51:00



## District School Board of Pasco County

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Employee Benefits, Assistance & Risk Management

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**DATE:** June 1, 2012

**TO:** Kendra Goodman, Purchasing Agent

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

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

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The District will piggy-back the Duval County School Board RFP, period July 1, 2012 – June 30, 2013, 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, 2013. 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, for the second year in a row, TSA, mindful of the District’s budget constraints, has chosen not to implement the increase. The purchase order for 2012-13 will need to be \$43,152 to cover an estimated 9,300 employees. 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 again this year. TSA is a true partner to the District.

Please request permission from the Board to approve a fourth year term with TSA, covering July 1, 2012 through June 30, 2013. 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.

