



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 1, 2011

MEMORANDUM

TO: Honorable School Board Members

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

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

On October 19, 2010, 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	Lincoln Investment Planning
AXA Equitable	MetLife Resources
Horace Mann	Suncoast Federal Credit Union (Members Trust)
ING	Valic
The Legend Group	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 fourth-year term will expire on December 31, 2011.

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, has requested renewal of the RFP for the term January 1, 2012 – December 31, 2012 with these companies. Accordingly, the firms were contacted to determine their willingness to enter into the fourth 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 fifth-year term with the companies noted above. Should you have any questions or concerns, please contact Mary Tillman or me at your earliest convenience.

KDG/mw
Attachments

District Wide Accreditation • Southern Association of Colleges and Schools

Date/Time: October 26, 2011 08:44:00



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

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: November 1, 2011

TO: Kendra Goodman, Purchasing Agent

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

RE: 2012 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 fourth 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 2012 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 2012 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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October 19, 2010

MEMORANDUM

TO: Honorable School Board Members

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

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

On November 3, 2009, 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	Lincoln Investment Planning
AXA Equitable	MetLife Resources
Horace Mann	Suncoast Federal Credit Union (Members Trust)
ING	Valic
The Legend Group	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 third-year term will expire on December 31, 2010.

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, has requested renewal of the RFP for the term January 1, 2011 – December 31, 2011 with these companies. Accordingly, the firms were contacted to determine their willingness to enter into the fourth 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 fourth-year term with the companies noted above. Should you have any questions or concerns, please contact Mary Tillman or me at your earliest convenience.

KDG/az
Attachments

District School Board
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District Wide Accreditation • Southern Association of Colleges and Schools

OCT 19 2010

Board Approved



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TDD: 813/ 794-2484

352/ 524-2221

e-mail: kgoodman@pasco.k12.fl.us

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 contract term will be January 1, 2012 – December 31, 2012.

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: _____

11/3/2011

PRINTED NAME/TITLE: _____

Cynthia Kleyman

E-MAIL: _____

ckleyman@legendgroup.com

TELEPHONE W/AREA CODE: _____

561-694-0110

FAX W/AREA CODE: _____

561-539-4414

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: Michael Woodall, Buying Manager
PURCHASING DEPARTMENT
20430 GATOR LANE, LAND O' LAKES, FL 34638
(813) 794-2504 (PHONE)
(813) 794-2111 (FAX)
mwoodall@pasco.k12.fl.us



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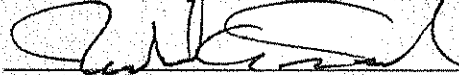
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RFP #08-006-AZ RENEWAL REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM

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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: Ameriprise Financial Services

SIGNATURE:  DATE: October 3rd 2011

PRINTED NAME/TITLE: Richard Tesch/ Director 403(b) Plans E-MAIL: richard.a.tesch@ampf.com

TELEPHONE W/AREA CODE: (612) 671-9598 FAX W/AREA CODE: (612) 678-5470

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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: HoraceMann

SIGNATURE: Tricia Seifert **DATE:** October 3, 2011

PRINTED NAME/TITLE: Tricia Seifert, AVP Market Alliance Services **E-MAIL:** Tricia.Seifert@horacemann.com

TELEPHONE W/AREA CODE: (866) 999-1945, Option 1 **FAX W/AREA CODE:** (800) 217-7351

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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: Suncoast Federal Credit Union

SIGNATURE: *Roy Echols* DATE: 10-4-2011

PRINTED NAME/TITLE: ROY ECHOLS, VP E-MAIL: roy.echols@suncoastfcu.org

TELEPHONE W/AREA CODE: 813-246-5211 FAX W/AREA CODE: 866-409-4478

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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: Waddell & Reed

SIGNATURE: Debra K. Schmidt DATE: 10/3/11

PRINTED NAME/TITLE: Debra K. Schmidt E-MAIL: d.schmidt@waddell.com
Vice President

TELEPHONE W/AREA CODE: (913) 263-1517 FAX W/AREA CODE: (913) 236-2552

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RFP #08-006-AZ RENEWAL REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM

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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: **MetLife Resources**

SIGNATURE: *Octavio Santos, Jr.* DATE: October 5, 2011

PRINTED NAME/TITLE: Octavio Santos, Jr., Regional Managing Director

E-MAIL: osantos@metlife.com

TELEPHONE W/AREA CODE: 407-333-3078 ext 13 FAX W/AREA CODE: 407-333-3346

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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: Lincoln Investment Planning, Inc.

SIGNATURE: [Signature] **DATE:** 10-05-2011

PRINTED NAME/TITLE: THOMAS MURPHY / COO **E-MAIL:** TMURPHY@LINCOLNINVESTMENT.COM

TELEPHONE W/AREA CODE: 315-881-4652 **FAX W/AREA CODE:** 315-374-1041

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COMPANY NAME: Valic

SIGNATURE: Todd Buchanan DATE: 10-10-11

PRINTED NAME/TITLE: Todd Buchanan Senior Regional V.P. E-MAIL: Todd.Buchanan@VALIC.COM

TELEPHONE W/AREA CODE: 813-269-3322 FAX W/AREA CODE: 813-269-3370

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: Michael Woodall, Buying Manager
PURCHASING DEPARTMENT
20430 GATOR LANE, LAND O' LAKES, FL 34638
(813) 794-2504 (PHONE)
(813) 794-2111 (FAX)
mwoodall@pasco.k12.fl.us



District School Board of Pasco County

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

Heather Florentino, 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

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 contract term will be January 1, 2012 – December 31, 2012.

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

COMPANY NAME: AXA Equitable

SIGNATURE: [Handwritten Signature]

DATE: 10/11/11

PRINTED NAME/TITLE: Steven Smitten, VP

E-MAIL: steven.smitten@axa-advisors.com

TELEPHONE W/AREA CODE: 813-466-3142

FAX W/AREA CODE: 813-289-8774

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.

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COMPANY NAME: **ING**

SIGNATURE: *Brian J. Murphy* DATE: 10/10/2011

PRINTED NAME/TITLE: Brian Murphy, Vice President E-MAIL: Brian.Murphy@us.ing.com

TELEPHONE W/AREA CODE: 860-580-1651 FAX W/AREA CODE: 860-580-1665

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