

The School Board of Broward County, Florida  
Procurement & Warehousing Services

ITB / RFP No.:	<u>18-010V</u>	Tentative Board Meeting Date*:	<u>JUNE 27, 2017</u>
Description:	<u>VOLUNTARY SUPPLEMENTAL INSURANCE</u>	Notified:	<u>600</u> Downloaded: <u>54</u>
	<u>FOR SCHOOL BOARD EMPLOYEES</u>	ITB / RFP Rec'd:	<u>8</u> No. Bids: <u>0</u>
For:	<u>BENEFITS &amp; EMPLOYMENT SERVICES</u>	ITB / RFP Opening:	<u>FEBRUARY 9, 2017</u>
Fund:	<u>N/A</u>	Advertised Date:	<u>DECEMBER 15, 2016</u>

**POSTING OF ITB / RFP RECOMMENDATION/TABULATION:** ITB / RFP Recommendations and Tabulations will be posted in the Procurement & Warehousing Services and [www.Demandstar.com](http://www.Demandstar.com) on **APRIL 3, 2017 @ 3:00 pm** and will remain posted for 72 hours. Any person who is adversely affected by the decision or intended decision shall file a notice of protest, in writing, within 72 hours after the posting of the notice of decision or intended decision. The formal written protest shall be filed within ten (10) days after the date the notice of protest is filed. Failure to file a notice of protest or failure to file a formal written protest shall constitute a waiver of proceedings under this chapter. Section 120.57(3)(b), Florida Statutes, states that "The formal written protest shall state with particularity the facts and law upon which the protest is based." Saturdays, Sundays, state holidays and days during which the District is closed shall be excluded in the computation of the 72-hour time period provided. Filings shall be at the office of the Director of Procurement & Warehousing Services, 7720 West Oakland Park Boulevard, Suite 323, Sunrise, Florida 33351. Any person who files an action protesting an intended decision shall post with the School Board, at the time of filing the formal written protest, a bond, payable to The School Board of Broward County, Florida, (SBBC), in an amount equal to one percent (1%) of the estimated value of the contract. Failure to post the bond required by SBBC Policy 3320, Part VIII, Purchasing Policies, Section N, within the time allowed for filing a bond shall constitute a waiver of the right to protest.

(\*) The Cone of Silence, as stated in the ITB / RFP, is in effect until this ITB / RFP is approved by SBBC. The Board meeting date stated above is tentative. Confirm with the Purchasing Agent of record for the actual date the Cone of Silence has concluded.

**RECOMMENDATION TABULATION**

BASED UPON THE RECOMMENDATION OF THE SUPERINTENDENT'S INSURANCE & WELLNESS ADVISORY COMMITTEE (SIWAC), IT IS RECOMMENDED THAT THE FOLLOWING LISTED PROPOSERS BE RECOMMENDED FOR AWARD FOR INDIVIDUAL INSURANCE PLANS FOR VOLUNTARY SUPPLEMENTAL INSURANCE FOR SCHOOL BOARD EMPLOYEES.

**COVERAGE**

**PROPOSER**

ACCIDENT PLANS

CONTINENTAL AMERICAN INSURANCE COMPANY D/B/A AFLAC  
CNO SERVICES, LLC D/B/A WASHINGTON NATIONAL INSURANCE  
COMPANY  
PENNSYLVANIA CASUALTY COMPANY D/B/A COMBINED INSURANCE  
COMPANY OF AMERICA – COMBINED WORKSITE SOLUTIONS

\*CANCER PLANS

CNO SERVICES, LLC D/B/A WASHINGTON NATIONAL INSURANCE  
COMPANY

\*CONSUMER FINANCIAL PLANS

**BMG MONEY, INC.**

CRITICAL ILLNESS PLANS

CONTINENTAL AMERICAN INSURANCE COMPANY D/B/A AFLAC  
CNO SERVICES, LLC D/B/A WASHINGTON NATIONAL INSURANCE  
COMPANY  
PENNSYLVANIA CASUALTY COMPANY D/B/A COMBINED INSURANCE  
COMPANY OF AMERICA – COMBINED WORKSITE SOLUTIONS

\*HOSPITAL INDEMNITY PLANS

CONTINENTAL AMERICAN INSURANCE COMPANY D/B/A AFLAC

LIFE INSURANCE PLANS

CONTINENTAL AMERICAN INSURANCE COMPANY D/B/A AFLAC  
**TEXAS LIFE INSURANCE COMPANY**  
CNO SERVICES, LLC D/B/A WASHINGTON NATIONAL INSURANCE  
COMPANY  
PENNSYLVANIA CASUALTY COMPANY D/B/A COMBINED INSURANCE  
COMPANY OF AMERICA – COMBINED WORKSITE SOLUTIONS

The School Board of Broward County, Florida, prohibits any policy or procedure which results in discrimination on the basis of age, color, disability, gender expression, national origin, marital status, race, religion, sex or sexual orientation. Individuals who wish to file a discrimination complaint, may call the Executive Director, Benefits & EEO Compliance at 754-321-2150 or Teletype Machine (TTY) at 754-321-2158.

Individuals with disabilities requesting accommodations under the Americans with Disabilities Act (ADA) may call the Equal Educational Opportunities (EEO) at 754-321-2150 or Teletype Machine (TTY) at 754-321-2158.

\*PREPAID LEGAL PLANS

U.S.LEGAL SERVICES, INC.

\*SHORT TERM LIABILITY PLANS

CONTINENTAL AMERICAN INSURANCE COMPANY D/B/A AFLAC

M/WBE ADVISOR: LAVINIA FREEMAN, M/WBE SPECIALIST III

(\* IN ACCORDANCE WITH SECTION 5.1 OF THE RFP, EVALUATION OF PROPOSALS, IF ONLY ONE PROPOSAL IS RECEIVED, THE COMMITTEE MAY PROCEED WITHOUT SCORING THE ONE RESPONSIVE PROPOSAL AND MAY NEGOTIATE THE BEST TERMS AND CONDITIONS WITH THAT SOLE PROPOSER OR MAY RECOMMEND THE REJECTION OF ALL PROPOSALS AS PERMITTED BY SECTION 6A-1.012(12)(c), F.A.C. THE COMMITTEE ELECTED TO NEGOTIATE WITH THE SOLE PROPOSER FOR EACH INSURANCE PLAN AS INDICATED ABOVE.

A PROPOSAL WAS RECEIVED FROM NATIONWIDE FOR PET INSURANCE. DURING NEGOTIATIONS, THE COMMITTEE DECLARED AN IMPASSE IN WRITING A CONTRACT WITH NATIONWIDE AND THE COMMITTEE DECIDED TO REJECT ALL PROPOSALS RECEIVED FOR PET INSURANCE.

NO PROPOSALS WERE RECEIVED FOR LONG-TERM CARE AND HOMEOWNERS INSURANCE; THESE PLANS WILL NOT BE REBID.

IT IS RECOMMENDED FOR REASON STATED ON THE ATTACHED RFP REJECTION SHEET, THE RFP IN ITS ENTIRETY BE REJECTED FOR NOT COMPLYING WITH THE REQUIREMENTS OF THE RFP.

CONTRACT PERIOD: JANUARY 1, 2018 THROUGH DECEMBER 31, 2020

By: \_\_\_\_\_

  
(Purchasing Agent)

Date: \_\_\_\_\_

4/3/17

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## SCORING SHEET

<b>Voluntary Supplemental Insurance for School Board Employees RFP 18-010V Accident</b>		<b>Max Points</b>	<b>Shawn Mass</b>	<b>Erum Motiwala</b>	<b>Craig Nichols</b>	<b>Harold "Chip" Osborn</b>	<b>Daniel Reynolds</b>	<b>Donna Sacco</b>	<b>Pete Tingom</b>	<b>Jack Vesey</b>	<b>Joseph Zeppetella</b>	<b>Average Score</b>
<b>Section A: Experience and Qualifications</b>		<b>30</b>										
	AFLAC	30	25	25	27	27	23	27	28	28	27	
	Combined Insurance Company of America	28	20	25	15	21	20	28	26	20	23	
	Washington National Insurance Company	29	22	25	20	27	24	25	24	17	24	
<b>Section B: Scope of Services</b>		<b>30</b>										
	AFLAC	27	25	25	27	28	22	25	28	26	26	
	Combined Insurance Company of America	25	18	25	15	25	19	23	28	22	22	
	Washington National Insurance Company	22	20	25	25	27	21	27	28	20	24	
<b>Section C: Cost of Services</b>		<b>30</b>										
	AFLAC	25	25	25	20	28	23	24	28	21	24	
	Combined Insurance Company of America	20	20	27	25	26	21	28	26	28	25	
	Washington National Insurance Company	23	18	21	15	27	20	20	24	14	20	
<b>Section D1: Supplier Diversity &amp; Outreach Program (M/WBE Participation)</b>		<b>6</b>										
	AFLAC	6	6	6	6	4	6	6	5	6	6	
	Combined Insurance Company of America	0	0	0	0	0	0	0	3	0	0	
	Washington National Insurance Company	4	2	2	2	2	4	4	4	2	3	

## SCORING SHEET

<b>Voluntary Supplemental Insurance for School Board Employees RFP 18-010V Accident</b>	<b>Max Points</b>	<b>Shawn Mass</b>	<b>Erum Motiwala</b>	<b>Craig Nichols</b>	<b>Harold "Chip" Osborn</b>	<b>Daniel Reynolds</b>	<b>Donna Sacco</b>	<b>Pete Tingom</b>	<b>Jack Veseley</b>	<b>Joseph Zeppetella</b>	<b>Average Score</b>
<b>Section D2: Supplier Diversity &amp; Outreach Program</b> (Employment Diversity Statistics)	<b>2</b>										
AFLAC		2	0	0	2	2	2	2	2	2	2
Combined Insurance Company of America		2	0	2	2	2	2	0	2	2	2
Washington National Insurance Company		2	2	0	2	2	2	2	2	2	2
<b>Section D3: Supplier Diversity &amp; Outreach Program</b> (Involvement in Minority Community)	<b>2</b>										
AFLAC		0	2	0	0	2	0	0	0	0	0
Combined Insurance Company of America		0	2	0	0	0	0	2	0	0	0
Washington National Insurance Company		0	0	0	0	0	0	0	0	0	0
<b>TOTAL SCORE</b>	<b>100</b>										
AFLAC		90	83	81	82	91	76	84	91	83	84.6
Combined Insurance Company of America		75	60	79	57	74	62	81	85	72	71.7
Washington National Insurance Company		80	64	73	64	85	71	78	82	55	72.4

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## SCORING SHEET

<b>Voluntary Supplemental Insurance for School Board Employees RFP 18-010V Critical Illness</b>		<b>Max Points</b>	<b>Shawn Mass</b>	<b>Erum Motiwala</b>	<b>Craig Nichols</b>	<b>Harold "Chip" Osborn</b>	<b>Daniel Reynolds</b>	<b>Donna Sacco</b>	<b>Pete Tingom</b>	<b>Jack Vesey</b>	<b>Joseph Zeppetella</b>	<b>Average Score</b>
<b>Section A: Experience and Qualifications</b>		<b>30</b>										
	AFLAC	30	27	25	27	28	22	27	28	28	27	
	Combined Insurance Company of America	28	20	25	15	23	19	26	24	17	22	
	Washington National Insurance Company	29	19	25	20	27	21	28	26	20	24	
<b>Section B: Scope of Services</b>		<b>30</b>										
	AFLAC	27	26	25	25	28	22	24	28	25	26	
	Combined Insurance Company of America	24	20	25	20	26	21	27	28	22	24	
	Washington National Insurance Company	28	19	25	15	27	23	25	28	20	23	
<b>Section C: Cost of Services</b>		<b>30</b>										
	AFLAC	28	27	26	20	28	26	28	25	29	26	
	Combined Insurance Company of America	25	21	25	27	26	25	22	24	20	24	
	Washington National Insurance Company	22	17	24	15	24	24	18	26	12	20	
<b>Section D1: Supplier Diversity &amp; Outreach Program (M/WBE Participation)</b>		<b>6</b>										
	AFLAC	6	6	6	6	4	6	6	6	6	6	
	Combined Insurance Company of America	0	0	0	0	0	0	0	0	0	0	
	Washington National Insurance Company	4	2	2	2	2	4	4	2	2	3	
<b>Section D2: Supplier Diversity &amp; Outreach Program (Employment Diversity Statistics)</b>		<b>2</b>										
	AFLAC	2	0	2	2	2	2	2	2	2	2	
	Combined Insurance Company of America	2	0	2	2	2	2	0	2	2	2	

Washington National Insurance Company		2	2	2	2	2	2	2	2	2	2
<b>Section D3: Supplier Diversity &amp; Outreach Program</b> (Involvement in Minority Community)		<b>2</b>									
AFLAC		0	2	0	0	2	0	0	0	0	0
Combined Insurance Company of America		0	2	0	0	0	0	2	0	0	0
Washington National Insurance Company		0	0	0	0	0	0	0	0	0	0
<b>TOTAL SCORE</b>		<b>100</b>									
AFLAC		93	88	84	80	92	78	87	89	90	86.8
Combined Insurance Company of America		79	63	77	64	77	67	77	78	61	71.4
Washington National Insurance Company		85	59	78	54	82	74	77	84	56	72.1

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## SCORING SHEET

<b>Voluntary Supplemental Insurance for School Board Employees RFP 18-010V Life Insurance</b>		<b>Max Points</b>	<b>Shawn Mass</b>	<b>Erum Motiwala</b>	<b>Craig Nichols</b>	<b>Harold "Chip" Osborn</b>	<b>Daniel Reynolds</b>	<b>Donna Sacco</b>	<b>Pete Tingom</b>	<b>Jack Vesej</b>	<b>Joseph Zeppetella</b>	<b>Average Score</b>
<b>Section A: Experience and Qualifications</b>		<b>30</b>										
	AFLAC	30	25	25	25	25	26	25	21	28	28	26
	Combined Insurance Company of America	28	20	25	15	24	24	27	26	17	23	23
	Texas Life Insurance Company	29	27	25	27	27	22	29	24	20	26	26
	Washington National Insurance Company	29	18	25	20	28	24	28	24	20	24	24
<b>Section B: Scope of Services</b>		<b>30</b>										
	AFLAC	28	24	25	15	27	26	24	26	20	24	24
	Combined Insurance Company of America	24	18	25	22	27	24	27	26	21	24	24
	Texas Life Insurance Company	27	22	25	25	27	23	29	26	26	26	26
	Washington National Insurance Company	25	20	25	17	27	25	25	26	24	24	24
<b>Section C: Cost of Services</b>		<b>30</b>										
	AFLAC	22	20	23	15	26	28	16	28	20	22	22
	Combined Insurance Company of America	25	24	25	25	28	27	24	24	25	25	25
	Texas Life Insurance Company	26	26	26	27	28	24	28	22	29	26	26
	Washington National Insurance Company	23	22	24	17	26	23	20	26	17	22	22
<b>Section D1: Supplier Diversity &amp; Outreach Program (M/WBE Participation)</b>		<b>6</b>										
	AFLAC	6	6	6	6	4	6	6	6	6	6	6
	Combined Insurance Company of America	0	0	0	0	0	0	0	0	0	0	0
	Texas Life Insurance Company	0	0	0	0	0	0	2	0	0	0	0
	Washington National Insurance Company	4	2	2	2	2	4	2	2	2	2	2

<b>Section D2: Supplier Diversity &amp; Outreach Program</b> (Employment Diversity Statistics)		<b>2</b>									
	AFLAC	2	0	2	2	2	2	2	2	2	2
	Combined Insurance Company of America	2	0	2	2	2	2	0	2	2	2
	Texas Life Insurance Company	2	2	2	2	2	2	2	2	2	2
	Washington National Insurance Company	2	2	2	2	2	2	0	2	2	2
<b>Section D3: Supplier Diversity &amp; Outreach Program</b> (Involvement in Minority Community)		<b>2</b>									
	AFLAC	0	2	0	0	2	0	0	0	0	0
	Combined Insurance Company of America	0	2	2	0	0	0	2	0	0	1
	Texas Life Insurance Company	0	0	0	0	0	0	0	0	0	0
	Washington National Insurance Company	0	0	2	0	0	0	0	0	0	0
<b>TOTAL SCORE</b>		<b>100</b>									
	AFLAC	88	77	81	63	87	87	69	90	76	79.8
	Combined Insurance Company of America	79	64	79	64	81	77	80	78	65	74.1
	Texas Life Insurance Company	84	77	78	81	84	71	90	74	77	79.6
	Washington National Insurance Company	83	64	80	58	85	78	75	80	65	74.2

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



RFP 18-010V

VOLUNTARY SUPPLEMENTAL INSURANCE FOR SCHOOL BOARD EMPLOYEES

RFP REJECTION SHEET

Reject entire proposal from Legal Access Consulting, LLC d/b/a LegalEASE. Proposer did not meet the Minimum Eligibility Requirements of the RFP for Section 4.2.6; therefore, their proposal was rejected.