



PO Box 40400
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Human Resources Department

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www.tusd1.org

DATE: March 7, 2013
TO: Jackie Posey, Procurement Specialist
FROM: Janet Underwood, Benefits Manager
RE: RFP No. 14-01-18 Life/AD&D and Supplemental Life/AD&D Benefits

Proposals were solicited by TUSD for a Life Insurance and Accidental Death & Dismemberment vendor. Proposals were received from The Hartford, The Standard, Prudential, Minnesota Life, Aetna, Lincoln Financial, MetLife and Mutual of Omaha.

One bidder did not sign the Offer and Acceptance page and was disqualified.

After independent reviews by each committee member, the committee reached consensus and recommends to the TUSD Governing Board that the contract be awarded as follows:

Life/AD&D and Supplemental Life/AD&D Benefits: Minnesota Life

The committee was comprised of the following personnel: Janet Underwood, Benefits Manager, Barbara Armstrong, Finance/Benefits Associate and Maria Serrano, Benefits Associate. The committee members were selected to create a cross-functional panel with significant hands-on benefits expertise in this type of coverage. Representatives from Buck Consultants, (TUSD's Benefits Consultant), assisted in analysis of the proposals and attended the panel meetings - Louis Montoya, Senior Consultant, Lisa Moore, Consultant, and Stefanie Hill, Consultant.

Jackie Posey, Procurement Specialist, attended all meetings of the committee and coordinated all RFP vendor communication, evaluations, and notifications.

The committee convened on 2/27/13 to obtain the proposals submitted in response to the RFP, along with the summary documents provided by Buck. This initial meeting was used to review of the scope of work, scoring criteria and requirements, deviations, questionnaire responses, plan coverage details, and initial pricing review; the committee provided individual scoring to the Procurement Specialist. The second meeting held on 2/28/13 determined that a short list of vendors was identified by the committee members' individual scores. Further review and discussion of the responses and coverage details was held at this meeting which produced a need to pose clarification questions to the short-list bidders, and to request best and final offers.

Best and Final offers were received and provided to Buck Consultants for analysis and summary. Committee members reconvened on 3/06/13 to review the Best and Final responses. The Hartford did not respond while The Standard and Minnesota Life did. At this final meeting, an in-depth review and additional discussion of the bidders' qualifications, offerings, customer service tools and availability and pricing was completed. The committee members discussed their independent evaluations of each bidder and were asked to provide a final score to Procurement by 3/7/2013. The committee provided these independent final evaluations to Jackie Posey, Procurement Specialist, which resulted in the committee choosing **Minnesota Life**.

Thank you for your consideration of our recommendation; we feel that we have chosen the best vendor to suit the needs of both the employee population as well as the District.

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14-01-18 Life/AD&D and Supplemental Life/AD&D Benefits TOTALS

| | Committee Member 1 | Committee Member 2 | Committee Member 3 | Total | Average |
|----------------|-----------------------|-----------------------|-----------------------|-------|----------|
| The Hartford | 400 | 480 | 480 | 1360 | 453.3333 |
| Minnesota Life | 480 | 500 | 500 | 1480 | 493.3333 |
| The Standard | 320 | 490 | 470 | 1280 | 426.6667 |

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