



Pam Smith
Risk Management and Benefits

5086 Canal Street, Milton, Florida 32570
Phone: (850) 983-4814
Fax: (850) 983-5009
smithp@santarosa.k12.fl.us

April 18, 2017

RE: RFP 17-03 Work Site Products Request for Proposals [Purchasing Website Link to RFP](#)

School Board Members,

We are pleased to request approval of **United Health Care** as a single source vendor for our Voluntary Group Worksite Products (Short Term Disability, Accident, Critical Illness/Cancer, and Hospital Indemnity). Currently, these products have been provided, with minimal product oversight, through our voluntary vendor process. Moving to a single source vendor will allow us to provide consistent education and information to our employees. We will move these products under our benefit administration system and products will be available each year at open enrollment to add or make changes to product choices. We will have single company support as well as Risk Management district support for employee product and claim needs. The district will have a dedicated agent with **United Health Care** to meet our group needs in a timely manner. Fisher Brown Bottrell, our district insurance broker, will be providing policy review and oversight when any changes are recommended by **United Health Care** after our initial implementation.

Employees currently holding products with other companies through payroll deduction will have the option to switch over to the new company or employees may maintain their product choices through their currently selected company. Previously approved vendors will be grandfathered in to continue servicing current clients but these vendors will no longer be soliciting for new business in our schools effective August 1, 2017. Employees wishing to purchase new products with grandfathered companies may do so personally through their own banking institution.

Our expectation will be that **United Health Care** offer the highest quality product choices possible at competitive rates while also offering the option for portability of selected products after an employee separates or retires from the school district. These products are paid exclusively by the employee as voluntary benefit selections.

This change will reduce our vendors in our schools from 19 to 11 vendor companies. All of these remaining vendors will only be selling investment products, not insurance worksite products. Our goal moving forward will be to continue to establish structures and supports that educate employees as they make personal and financial decisions they feel are best for themselves and their families.

RFP Committee Participants were: Gwynn Smith, Michelle Ingram, Amanda Makar, Jon Thrush and Pam Smith. Consultants on product analysis were Mike Carraway, Kara Bloomberg and Kelly Berry with Fisher Brown Bottrell.

This letter is to request approval of United Health Care as a single source vendor for service of Voluntary Worksite Group Products effective January 1, 2018.

Sincerely,

Pam Smith
Pam Smith
Coordinator of Risk Management & Benefits

Failure to file a protest within the time prescribed in section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under chapter 120, Florida Statutes.

PREPARING STUDENTS FOR SUCCESS BY PROVIDING A SUPERIOR, RELEVANT EDUCATION