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Bringing business and government together*

## Contracting Opportunity

**Title:** Group Employee Benefits and Related Services

**Agency:** Sourcewell

**Division:** Procurement Department

**Contract Number:** 051623

**CR Number:** 2096632

**Contract Term:** 4 years

**Date of Issue:** 03/28/2023

**Due Date/Time:** 05/16/2023 4:30 PM  
Central Time

**County(ies):** All NYS counties

**Classification:** Administrative & Technical - *Commodities*

**Opportunity Type:** General

**Entered By:** Jeremy Schwartz

**Description:** Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://portal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

**Service-Disabled Veteran-Owned Set Aside:** No

**Business entities awarded an identical or substantially similar procurement contract within the past five years:**

Colonial Life & Accident Insurance Company

Lincoln Financial Group

Sun Life Financial

## Contact Information

**Primary contact:** Sourcewell  
Procurement Department  
Jeremy Schwartz  
Procurement Manager  
202 12th Street NE  
P.O. Box 219  
Staples, MN 56479  
United States  
Ph: 218-894-5488  
rfp@sourcewell-mn.gov

**Submit to contact:** Sourcewell  
Procurement Department  
Jeremy Schwartz  
Procurement Manager  
202 12th Street NE  
P.O. Box 219  
Staples, MN 56479  
United States  
Ph: 218-894-5488  
rfp@sourcewell-mn.gov

## **Bid Results**

Bid Results have not been entered

## Awards

Awards have not been entered



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## EXHIBIT A

**SOURCEWELL  
GROUP EMPLOYEE BENEFITS AND  
RELATED SERVICES  
Proposals due 4:30 pm,  
May 16, 2023  
REQUEST FOR PROPOSALS**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

Published Mar. 29, 2023. 2488937

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# LOCALiQ

The Oklahoman

PO Box 631643 Cincinnati, OH 45263-1643

## PROOF OF PUBLICATION

Sourcewell  
Sourcewell  
PO BOX 219  
STAPLES MN 56479

STATE OF OKLAHOMA, COUNTY OF OKLAHOMA

The Oklahoman, a daily newspaper of general circulation in the State of Oklahoma, and which is a daily newspaper published in Oklahoma County and having paid general circulation therein; published and personal knowledge of the facts herein state and that the notice hereto annexed was Published in said newspapers in the issues dated on:

03/28/2023, 04/04/2023

and that the fees charged are legal.  
Sworn to and subscribed before on 04/04/2023

Legal Clerk

Notary, State of WI, County of Brown

My commission expires

Publication Cost: \$40.25

Order No: 8612746

Customer No: 727698

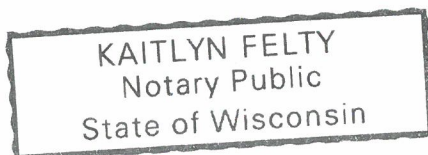
PO #:

# of Copies:

1

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*Please do not use this form for payment remittance.*



Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for **Group Employee Benefits and Related Services** to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.  
3/28/23, 4/4/23 8612746



Beaufort Gazette  
 Belleville News-Democrat  
 Bellingham Herald  
 Bradenton Herald  
 Centre Daily Times  
 Charlotte Observer  
 Columbus Ledger-Enquirer  
 Fresno Bee

The Herald - Rock Hill  
 Herald Sun - Durham  
 Idaho Statesman  
 Island Packet  
 Kansas City Star  
 Lexington Herald-Leader  
 Merced Sun-Star  
 Miami Herald

el Nuevo Herald - Miami  
 Modesto Bee  
 Raleigh News & Observer  
 The Olympian  
 Sacramento Bee  
 Fort Worth Star-Telegram  
 The State - Columbia  
 Sun Herald - Biloxi

Sun News - Myrtle Beach  
 The News Tribune Tacoma  
 The Telegraph - Macon  
 San Luis Obispo Tribune  
 Tri-City Herald  
 Wichita Eagle

## AFFIDAVIT OF PUBLICATION

Account #	Order Number	Identification	Order PO	Amount	Cols	Depth
34474	400448	Print Legal Ad-IPL01155800 - IPL0115580		\$151.85	1	18 L

Attention: Carol Jackson

SOURCEWELL  
 PO BOX 219  
 STAPLES, MN 56479

**REQUEST FOR PROPOSALS**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for **Group Employee Benefits and Related Services** to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [https://portal.sourcewell-mn.gov]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.  
 IPL0115580  
 Mar 28 2023

State of South Carolina

County of Richland

I, Tara Pennington, makes oath that the advertisement, was published in The State, a newspaper published in the City of Columbia, State and County aforesaid, in the issue(s) of

1 insertion(s) published on:  
 03/28/23

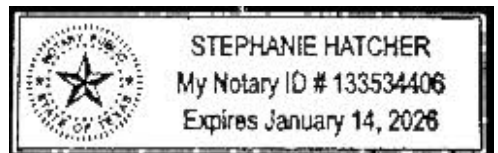
*Tara Pennington*

Tara Pennington

Sworn to and subscribed before me this 28th day of March in the year of 2023

*Stephanie Hatcher*

Notary Public in and for the state of Texas, residing in Dallas County



*Errors- the liability of the publisher on account of errors in or omissions from any advertisement will in no way exceed the amount of the charge for the space occupied by the item in error, and then only for the first incorrect insertion.*

Extra charge for lost or duplicate affidavits.  
 Legal document please do not destroy!



## FOR THE RECORD

## All times ET

GP	W	L	OT	Pts	GF	GA
y-Boston	73	57	11	5	119	275
Toronto	73	44	20	9	97	251
Tampa Bay	74	42	26	6	90	253
Florida	73	36	30	7	79	255
Buffalo	72	35	31	6	76	258
Ottawa	73	35	33	5	75	231
Detroit	72	32	37	9	71	209
Montreal	73	29	38	6	64	211

GP	W	L	OT	Pts	GF	GA
x-Carolina	72	47	16	9	103	241
x-New Jersey	73	46	19	8	100	256
N.Y. Rangers	73	43	20	10	96	247
N.Y. Islanders	74	37	27	9	83	219
Pittsburgh	73	37	27	10	82	235
Washington	74	34	32	8	76	236
Philadelphia	72	28	32	12	68	295
Columbus	72	23	42	7	53	196

GP	W	L	OT	Pts	GF	GA
Minnesota	73	42	22	9	93	219
Colorado	72	43	23	6	92	240
Dallas	73	39	20	14	92	251
Winnipeg	74	41	30	3	85	222
Nashville	72	36	28	8	204	216
St. Louis	73	34	34	6	72	236
Arizona	74	27	34	13	67	207
Chicago	73	24	43	6	54	179

GP	W	L	OT	Pts	GF	GA
Vegas	73	43	20	10	96	258
Los Angeles	73	43	20	9	91	286
Edmonton	72	40	24	8	88	253
Seattle	74	33	26	15	81	238
Vancouver	73	34	34	5	73	257
Anaheim	73	23	40	10	56	189
San Jose	73	19	39	15	53	209

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W	L	Pct	GB	
y-Memphis	47	27	.635	-
New Orleans	37	37	.500	10
Dallas	36	39	.480	11½
San Antonio	19	56	.253	28½
Houston	18	57	.240	29½

W	L	Pct	GB	
y-Denver	50	24	.676	-
Minnesota	38	37	.507	12½
Oklahoma City	37	38	.493	13½
Utah	35	39	.473	15
Portland	32	42	.432	18

W	L	Pct	GB	
Sacramento	45	29	.608	-
Phoenix	39	35	.527	6
L.A. Clippers	39	36	.520	6½
Golden State	39	37	.513	7
L.A. Lakers	37	38	.493	8½

W	L	Pct	GB
Phoenix at Utah			
Philadelphia at Denver			
Minnesota at Sacramento			
New Orleans at Portland			
Chicago at L.A. Clippers			

W	L	Pct	GB
Philadelphia at Denver			
Minnesota at Sacramento			
New Orleans at Portland			
Chicago at L.A. Clippers			
Tuesday's Games			
Boston at Washington, 7 p.m.			
Cleveland at Atlanta, 7:30 p.m.			
Miami at Toronto, 7:30 p.m.			



**Bid RFP #051623 - Group Employee Benefits and Related Services**

[\[Switch to Vendor View\]](#)

**Bid Type** RFP  
**Bid Number** 051623  
**Title** Group Employee Benefits and Related Services  
**Start Date** Mar 28, 2023 8:38:59 AM CDT  
**End Date** May 16, 2023 4:30:00 PM CDT  
**Agency** Sourcewell  
**Bid Contact** Jeremy Schwartz  
 (218) 894-5488  
 rfp@sourcewell-mn.gov  
 202 12th Street NE  
 P.O. Box 219  
 Staples, MN 56479-0219

**Access Reports**  
 View reports on who has been notified of the bid or accessed it.  
[\[Notification report\]](#) [\[Access report\]](#)  
**Questions**  
 0 Questions  
 0 Unanswered  
[\[View/Ask Questions\]](#)  
**Edit Bid**  
[\[Create Addendum\]](#)

**Description**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

**Pre-Bid Conference**

**Date** Apr 28, 2023 10:00:00 AM CDT  
**Location** Online Conference  
**Notes** Login information will be emailed two business days prior to the event.

**Documents**

No Documents for this bid

## View Details

Click [here](#) to return to the Sourcewell Procurement Portal home page.

**Bid Details**

Bid Classification: Bid Type: Bid Number: Bid Name: Bid Status: Bid Closing Date: Question Deadline: Electronic Auctions: Language for Bid Submissions: Submission Type: Submission Address: Public Opening: Description:	Goods RFP - General RFP 051623 Group Employee Benefits and Related Services <b>Open</b> Tue May 16, 2023 4:30:00 PM (CDT) Mon May 8, 2023 4:30:00 PM (CDT) Not Applicable English unless specified in the bid document Online Submissions Only Online Submissions Only No Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for <b>Group Employee Benefits and Related Services</b> to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [ <a href="https://portal.sourcewell-mn.gov">https://portal.sourcewell-mn.gov</a> ]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than <b>May 16, 2023, at 4:30 p.m. Central Time</b> , and late proposals will not be considered.
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Bid Document Access: Bid Opportunity notices and awards and a free preview of the bid documents is available on this site free of charge without registration. Please note, some documents may be secured and you will be required to register for the bid to download and view the documents. There is no cost to obtain an unsecured version of the document and/or to participate in this solicitation.

Categories: [Show Categories \[+\]](#)

Submit a Question
 Register for this Bid
 Download Bid Documents

## Meeting Locations

The following are the meeting times and locations for the opportunity:

Meeting Location	Description	Date / Time -	Mandatory Me...	Meeting Document
Online Pre-Proposal Conference	Login instructions will be posted to the "Documents" section and available to registered suppliers two business days prior to the web conference.	Friday April 28, 2023 10:00 AM (CDT)	No	

Documents	
File Name	Pages
<b>RFP_051623_Group_Employee_Benefits</b> Thursday March 23, 2023 02:35 PM	13
<b>RFP_051623_Group_Employee_Benefits_Contract_Template</b> Wednesday March 22, 2023 08:28 AM	18



Register

View Edit Delete Revisions

OPEN

### Group Employee Benefits and Related Services

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [https://proportal.sourcewell-mn.gov]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

#### Important Dates

- Pre-Proposal Conference:  
**April 28, 2023 at 10:00 am CDT**
- Proposals Due:  
**May 16, 2023 at 4:30 pm CDT**

To obtain a copy of the complete RFP, ask questions related to the RFP, or submit a proposal, please use the link below.

[Sourcewell Procurement Portal](#)



**Publish**

Bid Announcements

Doc. Taker's List

Bidding Type 1 Bid Notice Only

**Publish** /Verify Contents Save as Template

Solicitation Setting

- ✓ Invite Bidders No
- ✓ Evaluate Response online No
- ✓ Internal Approval No
- ✓ Enable Collaboration with other Users No

Solicitation Details

Mandatory Information			
Solicitation Type	RFP	Solicitation Number	051623
Solicitation Name	Group Employee Benefits and Related Services	Procurement Type	Goods, Services
Country & Province/State	Canada / Ontario	Published By	Sourcewell
Accept Questions	Not Applicable		

Internal Information (For Internal Use Only)	
Procurement Title/Project Name	051623 Group Employee Benefits and Related Services


Advertisement

Basic Settings			
Solicitation Type	Open to all suppliers	Estimated Contract Amount	\$500,000,000.00
Publish Date	03/28/2023	Closing Date & Time	05/16/2023 16:30:00 CT
Publish Option		Value Range for this Solicitation	10,000,001 over

- Selected Categories
- Consulting Services**
  - Financial Services: Financial/Insurance Products And Services: Auditors, Investors, Brokers, Banks Atm Machines, General Insurance & Risk Management Services, Consultant Tax Recovery, Purchasing/Corporate Cards, Credit Card Services, Corporate Sponsorship, Auctioneers, Parking Meters, Leasing/Credit Checks, Actuarial services, POS Sytems, Collection Services etc



Solicitation Overview



### Group Employee Benefits and Related Services

051623

**Closing Date:** 05/16/2023 04:30:00 PM CT

**Detail:**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [https://proportal.sourcewell-mn.gov]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

## Notice

### Basic Information

**Estimated Contract Value (CAD)** \$500,000,000.00 (Not shown to suppliers)  
**Reference Number** 0000244124  
**Issuing Organization** Sourcewell  
**Owner Organization**  
**Solicitation Type** RFP - Request for Proposal (Formal)  
**Solicitation Number** 051623  
**Title** Group Employee Benefits and Related Services  
**Source ID** PP.CO.USA.868485.C88455

### Details

**Location** All of Canada, All of Canada  
**Purchase Type** Duration:4 years  
**Description** Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than May 16, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

### Dates

**Publication** 2023/03/28 09:29:10 AM EDT  
**Question Acceptance Deadline** 2023/05/08 05:30:00 PM EDT  
**Questions are submitted online** No  
**Bid Intent** Not Available  
**Closing Date** 2023/05/16 05:30:00 PM EDT

**Prebid Conference** 2023/04/28 11:00:00 AM EDT

### Contact Information

Procurement Department  
 218-894-1930  
[rfp@sourcewell-mn.gov](mailto:rfp@sourcewell-mn.gov)

### Pre-Bidding Events

**Event Type** Prebid Conference  
**Attendance** Recommended  
**Event date** 2023/04/28 11:00:00 AM EDT  
**Location** Online Conference  
**Event Note** Login information will be emailed two business days prior to the event.

### Bid Submission Process

**Bid Submission Type** Electronic Bid Submission  
**Pricing** In attached document  
**Pricing** In attached document  
**Bid Documents List**

Item Name	Description	Mandatory
Bid Documents	Documents defining the proposal	Yes

## Categories

### Selected Categories

GSIN Category (1)	
S	<b>Services</b> Services
L	<b>Financial and Related Services</b> Financial and Related Services
L004C	<b>INSURANCE SERVICES</b> INSURANCE SERVICES
MERX Category (1)	
N	<b>Services</b> Services
N11	<b>Financial and Related Services</b> Financial and Related Services
UNSPSC Category (1)	
84000000	<b>Financial and Insurance Services</b>
84130000	<b>Insurance and retirement services</b>
84131600	<b>Life and health and accident insurance</b>