



COMMENT AND REVIEW
to the
REQUEST FOR PROPOSAL (RFP) #051623
Entitled

Group Employee Benefits and Related Services

The following advertisement was placed March 28, 2023 in *USA Today*, in South Carolina's *The State*, and on the Sourcewell website www.sourcewell-mn.gov, Sourcewell Procurement Portal <https://proportal.sourcewell-mn.gov>, Biddingo, Merx, PublicPurchase.com, The New York State Contract Reporter www.nyscr.ny.gov, March 29, 2023 in Oregon's *Daily Journal of Commerce*, and March 28 and April 4, 2023 in *The Oklahoman*:

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.

The solicitation process was conducted through the Sourcewell Procurement Portal. The following parties expressed interest in the solicitation by registering for this opportunity within the portal:

Alliant Insurance Services	Notary Public Central, Inc.
Aon Consulting, Inc.	Progyny
Aria Contracting Sales & Services, Inc.	Provident Agency, Inc.
Avesis, Inc.	PWXPress
AXIS Insurance Company	Quantum Health Inc
BMG Money, Inc.	Reliance Matrix (Reliance Standard Life Insurance Company)
Canada Life	Securian Financial Group, Inc.
Colonial Life & Accident Insurance Company	Securian Life Insurance Company
Dearborn Life	Sontiq, Inc.
Equitable	SSQ, Life Insurance Company, Inc.
EyeMed Vision Care, LLC	Standard Insurance
Found Benefits	Sun Life

LifeWorks (US), Ltd.	The Segal Company (Midwest States), Inc.
Lincoln National	Transamerica Corporation
Lotus Addiction Therapy, Inc.	UnitedHealthcare
Maplesoft Consulting, Inc.	Voya Financial, Inc.
MetLife	Wipro
New York Life Insurance Company	Workplace Options, LLC

All Proposals remained sealed within the Sourcewell Procurement Portal until the scheduled due date and time. Proposals were electronically opened, and the list of all Proposers was made publicly available on the Sourcewell Procurement Portal, on May 16, 2023, at 4:32:00 pm CT. Proposals were received from the following:

AXIS Insurance Company
 Colonial Life & Accident Insurance Company
 Lincoln National
 Metropolitan Life insurance Company dba MetLife
 Reliance Matrix (Reliance Standard Life Insurance Company)
 Sontiq, Inc.

Proposals were reviewed by the Proposal Evaluation Committee:

Kim Austin, MBA, CPPB, NIGP-CPP, Procurement Supervisor
 Greg Grunig, MA, Lead Procurement Analyst
 Brandon Town, NIGP-CPP, CPSM, CPSD, Procurement Analyst
 Michael Muñoz, CPPB, Procurement Analyst

The findings of the Proposal Evaluation Committee are summarized as follows:

The Proposal Evaluation Committee applied the Sourcewell RFP evaluation criteria and determined that all proposal responses met the scope and mandatory submittal requirements and were evaluated.

AXIS Insurance Company has been a provider of specialty lines of insurance to the emergency service market since 2001. AXIS has an existing partnership with Provident who specializes in insurance product solutions for the first responder sector. Through a national salesforce and insurance broker network they are able to serve participating entities in the United States and Canada. In addition, they are offering a solid discount where allowed.

Colonial Life & Accident Insurance Company is providing comprehensive selection of voluntary employee benefits. These products and services are being provided to by Colonial's over 15,000 independent contractors throughout the United States. Colonial will also provide in person nationwide benefits counseling. All products and services proposed by Colonial are being provided at competitive rates.

Lincoln National has been in business for over 110 years working with financial professionals, employers, and organizations to offer employee benefit programs. They have a sales force of over 180 representatives and over 250 account managers spread throughout the United States ready to serve Sourcewell participating entities, along with over 300 employees at their home office to support the sales and service teams. They are offering competitive rates.

MetLife has been in business since 1868 and is a leading provider of life insurance and group employee benefits. They have a strong background in providing solutions to government and educational agencies and are licensed in all of the United States. Their dedication to environmental sustainability is demonstrated in the fact they have been carbon neutral since 2016. Metlife is offering Sourcewell participating entities a considerable discount on pricing rates.

Reliance Standard Life Insurance Company is an A++ rated by AM Best insurance carrier offering a full line of ancillary group employee benefits including, life, disability, dental, vision, limited medical, critical illness, hospital indemnity, and accident coverage. They are prepared to serve Sourcewell participating entities throughout the United States. Reliance Standard is offering a substantial discount on premiums.

For these reasons, the Sourcewell Proposal Evaluation Committee recommends award of Sourcewell Contract #051623 to:

AXIS Insurance Company	#051623-AXC
Colonial Life & Accident Insurance Company	#051623-CLA
Lincoln National	#051623-LNG
Metropolitan Life insurance Company dba MetLife	#051623-MET
Reliance Standard Life Insurance Company	#051623-RLC

The preceding recommendations were approved on July 14, 2023.

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Kim Austin, MBA, CPPB, Procurement Supervisor

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Greg Grunig, MA, Lead Procurement Analyst

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Brandon Town, NIGP-CPP, CPSM, CPSD, Procurement Analyst

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Michael Muñoz, CPPB, Procurement Analyst

STATEMENT OF COMPLIANCE

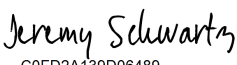
As Chief Procurement Officer for Sourcewell, I have reviewed the recommendation of the Evaluation Committee and the accompanying support materials documenting the process followed for **RFP #051623 for Group Employee Benefits and Related Services**.

The committee accepted, deemed responsive, evaluated, and recommended proposals for award. Under authority granted to the Chief Procurement Officer in Sourcewell's bylaws, the recommendations set forth above are approved.

I hereby certify:

1. Sourcewell is a government agency, created and authorized by Minnesota law to provide cooperative procurement contracts.
2. The procurement process and resulting contracts have been awarded in compliance with the laws of the State of Minnesota (Minnesota Statutes Chapter 471 and Minnesota Statutes Section 123A.21), and in conformity to Sourcewell's Procurement Policy.

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Jeremy Schwartz, CSSBB, CPPO, NIGP-CPP
Sourcewell Chief Procurement Officer