

**COMMENT AND REVIEW**  
to the  
REQUEST FOR PROPOSAL (RFP) 100319  
Entitled

**Group Employee Benefits and Related Services**

The following advertisement was placed August 15, 2019 in Utah's *The Salt Lake Tribune*, in *USA Today*, in South Carolina's *The State*, and on the Sourcewell website [www.sourcewell-mn.gov](http://www.sourcewell-mn.gov), Sourcewell Procurement Portal <https://proportal.sourcewell-mn.gov>, Biddingo, Merx, The New York State Contract Reporter [www.nyscr.ny.gov](http://www.nyscr.ny.gov), PublicPurchase.com, and August 16, 2019 in Oregon's *Daily Journal of Commerce*:

*Sourcewell, a State of Minnesota local government agency and service cooperative, is requesting proposals for Group Employee Benefits and Related Services to result in a contracting solution for use by its members. Sourcewell members include thousands of governmental, higher education, K-12 education, not-for-profit, 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 October 3, 2019, 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	New York Life
Avesis, Inc.	Ochs, Inc.
Brighton Health Plan Solutions	PBC Health Benefits Society
Colonial Life & Accident Insurance Company	Principal
Common Census, Inc.	Proficiency Billing
Dearborn Life	RDS Services, LLC
Desjardins Financial Security Life Assurance Company	Saponi Industries, Inc.
Guice Wealth Management	Security Mutual Life Insurance Company of New York
Industrial Alliance Insurance and Financial Services, Inc.	SSQ, Life Insurance Company, Inc.
Integrated Behavioral Health (IBH)	Sun Life
Interflex Payments, LLC	Sun Life Financial
Lincoln National	The Segal Company (Midwest States), Inc.
Livongo Health	UnitedHealthcare
Medavie Blue Cross	Unum
MetLife	Virgin Pulse
National Insurance Marketing Brokers, 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 October 3, 2019, at 4:44 PM CT. Proposals were received from the following:

Avesis, Inc.  
Colonial Life & Accident Insurance Company  
Lincoln Financial Group  
Sun Life Assurance Company of Canada

Proposals were reviewed by the Proposal Evaluation Committee:

Chris Robinson, CPSM, Sourcewell Procurement Manager  
Brandon Town, CPSM, CPSD, Sourcewell Procurement Analyst  
Stephanie Haataja, CPIM, Sourcewell Procurement Analyst  
Craig West, Sourcewell Procurement Analyst

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

The Proposal Evaluation Committee used the Sourcewell RFP evaluation criteria and determined that all proposal responses met Level-One Responsiveness. The response of Avesis, Inc., was deemed Level-Two non-responsive and was not evaluated. The remaining responses were deemed to be Level-Two responsive and were evaluated.

Colonial Life & Accident Insurance Company has served the payroll-marketed, voluntary employee benefit market for over 75 years, and offers a portfolio of individual and group plans providing life, short term disability, accident, critical illness, cancer and gap insurance coverages. Their enrollment and client services platforms provide real-time, secure access and prompt attention to meet member needs. Colonial Life's network of independent sales offices are available to serve members across the US.


Lincoln Financial Group has been in business for 110 years working with financial professionals, employers and organizations to help individuals and families plan their financial futures and protect their loved ones. They have a sales force of 180 representatives and over 200 account managers spread throughout the United States ready to serve Sourcewell Members, along with over 300 employees at their home office to support the sales and service teams. Their product offering is robust and gives Members access to a competitive standard discount off in force rates.

Sun Life Assurance Company of Canada has been in the employee benefits business since 1924 and has a solid offering of group benefits. Their services are demonstrated to be easy to access and with high levels of accuracy. Sun Life's flexible approach helps them deliver enhanced plans that fit the needs of their clients at affordable premiums. They have a sales presence throughout the US. Sun Life's Voice Response System enables members to access assistance 24 hours per day, 7 days a week for eligibility and benefit information.

For these reasons, the Sourcewell Proposal Review Committee recommends award of Sourcewell Contract #100319 to:


Colonial Life & Accident Insurance Company	100319-CLA
Lincoln Financial Group	100319-LFG
Sun Life Assurance Company of Canada	100319-SUN

The preceding recommendations were approved on November 22, 2019.

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Chris Robinson, JD, CPSM, Sourcwell Procurement Manager

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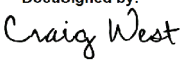
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Brandon Town, CPSM, CPSD, Sourcwell Procurement Analyst

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Stephanie Haataja, CPIM, Sourcwell Procurement Analyst

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Craig West, Sourcwell Procurement Analyst

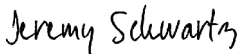
### STATEMENT OF COMPLIANCE

As Chief Procurement Officer for Sourcwell, I have reviewed the recommendation of the Evaluation Committee and the accompanying support materials documenting the process followed for **RFP #100319 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 Sourcwell'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, ASQ CSSBB  
Chief Procurement Officer