

# ITN No. N217400ES - Group Term Life and AD&D Insurance Scoring Summary

June 21, 2021

| Supplier                                    | Total<br>/ 100 pts |
|---|--------------------|
| Securian Financial Group                    | 80.8               |
| MetLife                                     | 73.4               |
| The Prudential Insurance Company of America | 63                 |
| VOYA Financial                              | 60.6               |
| The Standard                                | 56.2               |

~~34~~ VENDOR(S) WERE NOTIFIED OF ITN  
6 VENDOR(S) SUBMITTED RESPONSE  
2 VENDOR(S) NO BID RESPONSE  
~~26~~ VENDOR(S) DID NOT RESPOND

APPROVED BY: 

Doug Gupton, Procurement Agent  
Department of Procurement Services  
June 21, 2021

---

Date

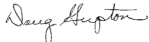
|  |   |  |  |  |   |
|--|---|--|--|--|---|
| <p>THE SCHOOL DISTRICT OF LEE COUNTY<br/>DEPARTMENT OF PROCUREMENT SERVICES<br/>2855 COLONIAL BLVD.<br/>FORT MYERS, FLORIDA 33966</p> <p>Group Term Life and AD&amp;D Insurance<br/>ITN No. N217400ES<br/>OPENING DATE: Monday May 17, 2021 2:00PM</p> | <p>Hartford Life &amp; Accident Insurance Company<br/>Attn: Sheila W. Sokolski &amp; Philip Bogard<br/>One Hartford Plaza<br/>Hartford, CT 06155</p> <p>Phone: (860) 547-5000<br/>Email: sheila.sokolski@thehartford.com<br/>Email: Philip.Bogard@thehartford.com</p> | <p>Lincoln Financial Group<br/>Attn: Rick McNew &amp; Gail B. Anderson<br/>150 N Radnor-Chester Road<br/>Radnor, PA 19087-5221</p> <p>Phone: (616) 350-0788<br/>Email: Rick.McNew@Lincoln.com<br/>Email: Gail.Anderson@Lincoln.com</p> | <p>Metropolitan Life Insurance Company<br/>Attn: John C. Pittman &amp; Thomas Remus<br/>200 Park Avenue<br/>New York, NY 10166</p> <p>Phone: (813) 373-2449<br/>Email: jcpittman@metlife.com<br/>Email: tremus@metlife.com</p> | <p>New York Life<br/>Attn: Scott Carlisle &amp; Delia Pasquariello<br/>51 Madison Avenue<br/>New York, NY 10016</p> <p>Phone: (860) 907-0561<br/>Email: delia_pasquariello@newyorklife.com</p> | <p>Securian Financial Group<br/>(Minnesota Life Insurance Company)<br/>Attn: Susan Munson-Regala &amp; Paul Romuald<br/>400 Robert Street North<br/>St. Paul, MN 55101</p> <p>Phone: (651) 665-3500<br/>Email: susan.munsonregala@securian.com<br/>Email: paul.romuald@securian.com</p> |
| <p>Proposal Information Sheet (first page of proposal)</p>   | <p><b>NO BID</b></p>  | <p><b>NON-RESPONSIVE</b></p>   | <p>Yes</p>   | <p><b>NO BID</b></p>   | <p>Yes</p>  |
| <p>Letter of Transmittal</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Required Submittal Checklist</p>  |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Copy of Current Florida Business License</p>  |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>AM Best Rating</p>  |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Questionnaire</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment A - Insurance Requirements Form</p>  |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment B - Addenda Acknowledgement Form</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment C - Debarment Form</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment D - Drug Free Workplace Certification</p>  |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment E - Public Entities Crime Form</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment F - Emergency/Storm Related Catastrophe Agreement Form</p>   |   |  | <p>Yes</p>   |  | <p>Yes</p>  |
| <p>Attachment G - Scrutinized Company Certification Form</p>   | <p>Yes</p>  | <p>Yes</p>   |  |  |   |
| <p>Attachment H - Confidential, Proprietary or Trade Secret Acknowledgement</p>  | <p>Yes</p>  | <p>Yes</p>   |  |  |   |
| <p>Attachment I - Reference Request Form</p>   | <p>Yes</p>  | <p>Yes</p>   |  |  |   |

|  |   |   |  |
|--|---|---|--|
| <p>THE SCHOOL DISTRICT OF LEE COUNTY<br/>DEPARTMENT OF PROCUREMENT SERVICES<br/>2855 COLONIAL BLVD.<br/>FORT MYERS, FLORIDA 33966</p> <p>Group Term Life and AD&amp;D Insurance<br/>ITN No. N217400ES<br/>OPENING DATE: Monday May 17, 2021 2:00PM</p> | <p>The Prudential Insurance Company of America<br/>Attn: Sara Guinn-Bailey &amp; Chris Murray<br/>751 Broad Street<br/>Newark, NJ 07102</p> | <p>The Standard Insurance Company<br/>Attn: Jeanne Bailey &amp; Jarod Hayer<br/>1100 SW 6th Avenue<br/>Portland, OR 97204</p> | <p>VOYA Financial<br/>(ReliaStar Life Insurance Company)<br/>Attn: Krista Snow &amp; Amy Hall<br/>20 Washington Avenue South<br/>Minneapolis, MN 55401</p> |
|  | <p>Phone: (973) 802-6000<br/>Email: sara.guinn-bailey@prudential.com<br/>Email: Christopher.murray@prudential.com</p>                       | <p>Phone: (813) 879-2900<br/>Email: Jeanne.Bailey@standard.com<br/>Email: Jarod.Hayer@standard.com</p>                        | <p>Phone: (612) 372-5341<br/>Email: Krista.Snow@voya.com<br/>Email: Amy.Hall@voya.com</p>  |
| Proposal Information Sheet (first page of proposal)  | Yes   | Yes   | Yes  |
| Letter of Transmittal  | Yes   | Yes   | Yes  |
| Required Submittal Checklist   | Yes   | Yes   | Yes  |
| Copy of Current Florida Business License   | Yes   | Yes   | Yes  |
| AM Best Rating   | Yes   | Yes   | Yes  |
| Questionnaire  | Yes   | Yes   | Yes  |
| Attachment A - Insurance Requirements Form   | Yes   | Yes   | Yes  |
| Attachment B - Addenda Acknowledgement Form  | Yes   | Yes   | Yes  |
| Attachment C - Debarment Form  | Yes   | Yes   | Yes  |
| Attachment D - Drug Free Workplace Certification   | Yes   | Yes   | Yes  |
| Attachment E - Public Entities Crime Form  | Yes   | Yes   | Yes  |
| Attachment F - Emergency/Storm Related Catastrophe Agreement Form  | Yes   | Yes   | Yes  |
| Attachment G - Scrutinized Company Certification Form  | Yes   | Yes   | Yes  |
| Attachment H - Confidential, Proprietary or Trade Secret Acknowledgement   | Yes   | Yes   | Yes  |
| Attachment I - Reference Request Form  | Yes   | Yes   | Yes  |

[Redacted] = AWARDED VENDOR

|    |                                |
|----|--------------------------------|
| 34 | Vendor(s) Were Notified of ITN |
| 6  | Vendor(s) Submitted Proposals  |
| 2  | Vendor(s) Submitted No Bid     |
| 26 | Vendor(s) Did Not Respond      |

IT IS RECOMMENDED THIS ITN BE AWARDED TO SECURIAN FINANCIAL GROUP HAVING SUBMITTED THE LOWEST OVERALL AND BEST RESPONSE MEETING SPECIFICATIONS.

  
 APPROVED BY: \_\_\_\_\_ DATE: June 21, 2021  
 Doug Gupton  
 PROCUREMENT AGENT

BID TABULATION ONLY. THIS IS NOT A PURCHASE ORDER.  
 ATTN: SCHOOL DISTRICT PERSONNEL. BID NUMBER, ITEM NUMBER & DESCRIPTION MUST BE ENTERED ON REQUISITION(S).