

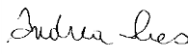
CITY OF HALLANDALE BEACH, FLORIDA
MEMORANDUM

DATE: May 28, 2019

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director 

SUBJECT: **Award Recommendation Memorandum RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH**

This project continues to be under a Cone of Silence. There is to be no communication with any of the Firms until the date and time of the City Commission meeting when the award or rejection of the solicitation will be made.

If you have any questions on any of the items below please make sure you contact the Procurement Director immediately for clarification.

Due to the size of the documents for this Project, a USB drive has been forwarded to you via interoffice mail with a copy of all the following documents:

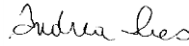
1. Four (4) Proposals received in response to this RFP
2. Award Recommendation Memorandum
3. Summary Rating Sheet
4. Summary of Findings from Consultant, Gallagher Benefits Services, Inc. This includes review of all Minimum Qualification Requirements (MQRs) for determination of responsiveness for each proposing Firm
5. Addenda #1-4
6. RFP document
7. Exhibits A, B1, B2, C1, C2, E1, E2, and J
8. Reference Check Summary
9. Non-Mandatory Pre-Proposal Conference Sign-In Sheet 4/16/2019
10. City Clerks List of Firm's Proposing 5/3/2019

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director



SUBJECT: AWARD RECOMMENDATION MEMORANDUM: RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH

Duties and Responsibilities:


1. Project Manager is responsible for preparing the agenda cover memo for recommendation of award to the City Commission. Contact the City Clerk if there are any questions about the agenda process.
2. As part of the agenda process, provide the following items to the City Attorney for creation of the Resolution:
 - a. RFP document
 - b. Agenda Cover Memo
 - c. All backup referenced in the Agenda Cover Memo
3. If the RFP is to be rejected, an agenda item must be prepared for the rejection. This is in accordance with Procurement Code Section 23-12, (4) Rejection of Bids.
4. The Procurement Department will invite the recommended Firm(s) to the City Commission meeting if requested. You **must** email Carolyn Allen-Smith csmith@cohb.org, if the Firm(s) are to be invited and advise of the date of the City Commission meeting.
5. Ensure that you route the final, fully negotiated agreement and resolution that your Department has negotiated with the City's ARTEF (Agreement Review and Transmittal Execution Form) promptly to Tom Camaj, Contract Coordinator, via email tcamaj@cohb.org to ensure processing. Please note that the ARTEF and the explanation of the process for routing of the Agreement is found on the City's CityNet, under City Docs, Reference Docs, Procurement, Contract Routing Documents. Link to [ARTEF](#) .
6. Legal Proceedings form must be reviewed by the Project Manager/Department Director for this Project. Ensure you have addressed and discussed with the City Attorney and City Manager before requesting recommendation for award through the Interim City Commission.
7. Variance form must be reviewed by the Project Manager/Department Director for this Project. Ensure you have addressed and discussed with the City Attorney and City Manager before requesting recommendation for award through the Interim City Commission.

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director



SUBJECT: AWARD RECOMMENDATION MEMORANDUM: RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH

Summary Information

Attached is the Summary Rating Sheet for the five (5) Evaluation Committee members for the four (4) Firms that responded to this RFP which met the Minimum Qualification Requirements. Gallagher Benefit Services, Inc. (GBS) reviewed all of the Minimum Qualification Requirements (MQRs) for determination of responsiveness for each proposing Firm.

Find below the information for the Award Recommendation for RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH.

Release Date of RFP: April 5, 2019

The release notice for the RFP was sent via email to one hundred and twenty-one (121) vendors from the City's Vendor list. The RFP was also advertised in the Hallandale Beach Chamber of Commerce website, City's website, DEMANDSTAR website, and City and HBCRA Social Media pages. The RFP was also advertised through the Miami Minority Business Development Agency Business Center, the U.S. Small Business Administration, and the Broward County Community Relations and Outreach Section Office of Economic and Small Business Development.

Non-Mandatory Pre-Proposal Conference: was held on April 16, 2019 at 11:00 a.m.

There were two (2) Firm's in attendance at the Non-Mandatory Pre-Proposal Conference and six (6) staff members.

In addition to providing the opportunity for Firm's to come and ask questions during the Non-Mandatory Pre-Proposal Conference, the solicitation allowed for additional questions to be sent in via email by no later than **April 17, 2019 @ 11:00 a.m.**

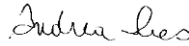
Due Date: Responses to the RFP were due **May 3, 2019 @ 11:00 a.m.**

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director



SUBJECT: AWARD RECOMMENDATION MEMORANDUM: RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH

Proposals Received:

Four (4) proposals were received from the following vendors in order of highest ranked:

NO.	PROPOSING FIRM	REFERENCES	LEGAL PROCEEDINGS	VARIANCES
1	OCHS, SECURIAN GROUP, AND MADISON NATIONAL LIFE INSURANCE COMPANY, INC. 400 Robert Street North, Suite 1880 St. Paul, MN 55101 Jessica Grinsteinor or Lexie Shouman jgrinsteinor@ochsinc.com or lshouman@ochsinc.com 1-800-392-7295 or 1-800-392-7295	3 of 3 Confirmed.	Provided must read pages 161- 162 of proposal.	Provided must read page 12 and page 159 of proposal.
2	HARTFORD LIFE AND ACCIDENT INSURANCE COMPANY One Hartford Plaza Hartford, CT 06155 Johnathan Pearce Jonathan.pearce@thehartford.com 860-547-5000	3 of 3 Confirmed.	Provided must read Item #6 Required Forms of proposal.	Provided must read Item #6 Required Forms of proposal.
3	STANDARD INSURANCE COMPANY 800 Corporate Drive Suite 210 Fort Lauderdale, FL 33334 Scott Wheeler Scott.wheeler@standard.com 954-958-0704 ext. 1704 or 813-734-2588	**FIRM NOT RATED		
4	LIFE INSURANCE COMPANY OF NORTH AMERICA (DBA CIGNA GROUP INSURANCE) 2701 N. Rocky Point Drive, STE 800 Tampa, FL 33607 Christopher Dudley christopher.dudley@cigna.com 954-514-6869	*FIRM DETERMINED NON-RESPONSIVE		

Non-Responsive

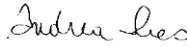
***Life Insurance Company of North America (DBA Cigna Group Insurance)** - It was determined by the City's consultant, Gallagher Benefits Services, Inc., that Life Insurance Company of North America (DBA Cigna Group Insurance) did not meet the minimum qualification requirements set forth in the RFP. The Firm did not provide the requested documentation to meet Minimum Qualification Requirement MQR # 3: Previous

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director



SUBJECT: AWARD RECOMMENDATION MEMORANDUM: RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH

Experience. The Procurement Department requested via phone and email missing information for MQR # 3.

Not Evaluated and Not Rated:

****Standard Insurance Company** – It was determined by the Evaluation Committee by consensus that Standard Insurance Company would not continue through the evaluation process due to the Firm not offering Accidental Death and Dismemberment (AD&D).

Evaluation Committee:

The Evaluation Committee, appointed by the Interim City Manager, was composed of the following individuals representing the following employee groups:

- Amber Cox, Administrative Assistant - General Employees
- Carol Gushwa, Fire Rescue Captain – Fire Employees
- Raul Rivera, Police Sergeant – Police Employees
- Alyssa Jones-Wood, Green Initiatives Coordinator – Management Employees
- Linda Rosario, Junior Accountant Accounts Receivable – Unrepresentative Employees

It was determined by the Project Manager, Radu Dodea and Consultant, Gallagher Benefit Services, Inc., that Oral Presentations would not be held for this RFP.

On April 24, 2019, at 3:00 p.m. an Evaluation Committee training meeting was held to explain in depth the the RFP process and the Cone of Silence to all appointed evaluators.

On May 23, 2019, at 8:30 a.m., a Sunshine Evaluation Committee meeting was held with the Evaluation Committee to discuss the proposals received. At this meeting, Gallagher Benefit Services, Inc., Consultant hired for this project through Resolution No. 2019-004, provided a written recommendation for each proposer having met or not met the Minimum Qualification Requirements (MQRs). Consultant also provided an outline comparing the proposals and provided guidance to the Evaluation Committee in their review of each proposal.

On May 23, 2019, the Evaluation Committee submitted rating sheets for four (4) Firms.




Prepared by: _____
Carolyn Allen-Smith, Procurement Specialist

TO: Radu Dodea, Director of Human Resources

Note: All parties below will only receive the award recommendation memorandum via email.

CC: Greg Chavarria, City Manager
Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director
Keven Klopp, Assistant City Manager

FROM: Andrea Lues, Procurement Director



SUBJECT: AWARD RECOMMENDATION MEMORANDUM: RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH

This AWARD RECOMMENDATION MEMORANDUM: **RFP # FY 2018-2019-005 GROUP LIFE INSURANCE AND ACCIDENTAL DEATH AND DISMEMBERMENT (AD&D), SUPPLEMENTAL LIFE INSURANCE AND LONG-TERM DISABILITY INSURANCE FOR CITY OF HALLANDALE BEACH**, and all its content was discussed through a face to face meeting with the following Project Manager to ensure that each item is understood and the next step process to award the Agreement are understood and correctly followed by the Project Manager.

I Radu Dodea, hereby acknowledge receipt of this Memorandum and confirm that I have read and understand the process that must be followed; after the City Commission pass a Resolution awarding the contract to a Firm. I agree to comply with the process outlined in this Memorandum and if I am not clear about a particular process; I will contact the Procurement Department for guidance. I further acknowledge that I am responsible, as the Project Manager for this Project, to ensure that I manage negotiations for this Project and as soon as a fully negotiated Agreement is completed through me; I will process the ARTEF for execution of the Agreement through the Procurement Department. I further acknowledge that it is my responsibility to ensure a fully executed Agreement is received by me in a timeline manner after the contract has been negotiated by following up on the status of execution of the Agreement through the Procurement Department.

Signature of Project Manager

Date