

AGENDA ITEM REPORT

DATE: October 7, 2025
DEPARTMENT: Human Resources
REQUESTER: Dominick Boyd
TITLE: Award Contract for Employee Disability Benefits

I. MOTION REQUESTED

- A. Award Request for Proposal No. RFP250137JLO, Employee Benefits – Disability Benefits to Standard Insurance Company to provide a fully insured group disability plan, offering long-term and short-term disability benefits for County employees and participating entities, on an as-needed basis, for an initial term of three years, as approved in the departments' annual adopted budget.
- B. Authorize the Chair to execute the contract documents on behalf of the Board of County Commissioners.
- C. Grant the County Manager or designee the authority to renew the contract, for up to two additional years, and to execute all associated documents, as approved in the departments' annual adopted budgets, if doing so is in the best interest of Lee County.

II. ITEM SUMMARY

Awards a three-year contract to Standard Insurance Company to provide and administer employee long-term and short-term disability benefits, with two possible renewals. Long-term coverage is employer-paid, short-term is voluntary employee-paid, with a three-year rate guarantee. Long-term disability costs were approximately \$702,056 in FY24–25 and are projected at \$548,597 in FY25–26, saving \$153,459. Short-term voluntary coverage is estimated at \$369,759.

III. BACKGROUND AND IMPLICATIONS OF ACTION

Procurement Management issued Request for Proposal No. RFP250137JLO Employee Benefits – Disability Benefits. On the solicitation deadline of June 11, 2025, Procurement Management received seven (7) submittals.

An evaluation meeting was held on July 28, 2025, during which the Evaluation Committee considered criteria as listed in the solicitation request, including such items as: Experience & Reference, Customer Service, Claim Processing, Performance Metrics & Guarantees, Plan Design, Cost Consideration & Contractual Terms, Systems Reporting, and Local Vendor Preference.

Based on the information submitted by the proposers, the Committee reached a consensus to negotiate with and recommend the award of a contract to Standard Insurance Company for use on an as-needed basis for an initial three-year term. The contract can be renewed up to two additional years, upon the agreement of both parties.

IV. FINANCIAL INFORMATION

Current Year Dollar Amount:	See Comments below.
Included in the Current Budget?:	Yes
Fund:	Various department budgets
Comments:	Long-term: \$548,597 Short-term: \$369,759

Is this a revenue or expense item? Expense

Is this Discretionary or Mandatory? Discretionary

Will this item impact future budgets?

Program:

Project:

Account Strings: Various operating department budgets

Fund Type?

V. RECOMMENDATION

Approve

ATTACHMENTS:

Lee County BOCC Agreement STD LTD RFP250137JLO 01-01-26 to 12-31-28-signed 9-16-25, Price Verification Sheet

REVIEWERS:

Lynne Peterson, Human Resources
Mary Tucker, Procurement
Dominick Boyd, Human Resources
Anne Henkel, Budget Services
Peter Winton, County Manager
Andrea Fraser, County Attorney
Christine Brady, County Manager

Created/Initiated - 9/24/2025
Approved - 9/25/2025
Approved - 9/25/2025
Approved - 9/25/2025
Approved - 9/25/2025
Approved - 9/25/2025
Final Approval - 9/30/2025