

CAMERON COUNTY PURCHASING

1100 E. Monroe St,
Brownsville, Texas 78520
(956) 544-0871 Fax: (956) 550-7219

ADDENDUM # 1 - PAGE 1 of 4

Date out : 6-18-20

RFP # 200304

RFP TITLE: 457 PLAN CONSULTANT & PLAN ADMINISTRATOR

DEADLINE: JULY 14, 2020

(IN ORDER TO AVOID DISQUALIFICATION – ALL ADDENDUMS MUST BE SIGNED AND RETURNED BY DEADLINE AND INCLUDED IN THE SEALED RFP PACKAGE SUBMITTED)

CHANGE PAGE # 10 – EVALUATION AND SCORING CRITERIA

FROM:

<u>Criteria</u>	<u>Maximum Points</u>
Qualifications	30
Experience	30
Capacity to Perform	20
Quality of Work	20
Total	100

TO:

<u>Criteria</u>	<u>Maximum Points</u>
Qualifications	20
Experience	20
Capacity to Perform	20
Quality of Work	20
Price	20
Total	100

Company Name _____ Phone # _____
Vendor Signature _____ Date _____

Must include and return with RFP package

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CHANGE PAGE 1

FROM:

Please return an **ORIGINAL AND SEVEN (7) COPIES** of your RFP response in a sealed envelope. Be sure that return envelope shows the RFP Number, Description and is marked "SEALED RFP". Also, submit a soft copy with your proposal.

TO:

Submit 2 ea soft copies (USB's) and no hard copies.

CHANGE PAGE 5

FROM:

ORIGINAL AND SEVEN (7) COPIES OF RFP's MUST BE SUBMITTED

TO:

Submit 2 ea soft copies (USB's) and no hard copies.

ADD Contract Term

TERM – 3 YEARS WITH TWO (2) ADDITIONAL ONE (1) YEAR RENEWALS

Company Name _____ Phone # _____
Vendor Signature _____ Date _____

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ADD PRICE PAGE

NOTE: All proposed services are considered usual and customary plan expenses by the Department of Labor (DOL) and may be paid for from plan assets rather than the County's operating budget.

Proposed Pricing Request Format

The County is requesting an annual flat fee for the following 457(b) plan fiduciary services:

1. Plan-Level Fiduciary Services – Comprehensive plan design review, existing contract review, and recommendations surrounding plan design going forward. Includes ongoing plan design advice.
2. Request for Proposal – Include the cost to go to RFP (Request for Proposal) for the plan's recordkeeping and administrative services.
3. Investment Due Diligence – Investment option selection and ongoing investment option due diligence.

Pricing for Items 1-3:

Year 1: \$ _____ per year

Year 2: \$ _____ per year

Year 3: \$ _____ per year

Year 4: \$ _____ per year

Year 5: \$ _____ per year

4. Participant-Level Fiduciary Services and Advice – Ongoing, independent education and advice to our employee base. Please include 18 employee service days for the first year, and 12 employee service days for subsequent years.

Pricing for Item 4:

Year 1: \$ _____ per year Year 2: \$ _____ per year Year 3: \$ _____ per year

Year 4: \$ _____ per year Year 5: \$ _____ per year

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ADD QUESTIONS DEADLINE

JULY 2, 2020 - THURSDAY

ANSWERS TO BE POSTED ON WEB

JULY 6, 2020 - MONDAY

Company Name _____ Phone # _____
Vendor Signature _____ Date _____

Must include and return with RFP package