

## **REQUEST FOR PROPOSAL NOTICE**

**Township of Crescent announces the following Request for Proposal (RFP):**

Proposal For: Investment Advisory and Administrative Services for the creation of a 457b plan

Services Provided For: Public Works Employee Pension Plan

RFP NOTICE NUMBER: 2020-01

RFP OPENING DATE: **August 1, 2020** RFP CLOSING DATE: **September 1, 2020**

### **DESCRIPTION OF SERVICES DESIRED:**

Applicants that respond to this RFP must be able to provide a complete package of pension services that will include:

1. A comprehensive menu of pension administrative services
2. Pension policy design, re-design, or adjustments (as necessary)
3. Comprehensive investment services and investment strategy
4. Administration – as requested, but not necessarily part of the main menu of Administrative/Actuarial services
5. Offer periodic meetings with the municipal leadership to review pension plan

### **SPECIFICATIONS RELATED TO THE SERVICES DESIRED:**

A more detailed description of the services desired is provided in the RFP – general information section.

### **MINIMUM REQUIREMENTS TO RESPOND:**

Applicants that respond to this RFP must be have experience providing similar pension services to institutional and/or municipal/government entities as described above.

### **RFP RESPONSE DOCUMENTS:**

Applicants that respond to this RFP must be able to provide the following Documents by the RFP Closing Date listed above:

1. A completed RFP Application (RFP Part C)
2. A completed Standard Disclosure Form (RFP Part D)
3. A completed Applicant Status Notification (RFP Part E) – header information only
4. Additional documents requested by the Township or at the discretion of the applicant
5. A current resume of anyone listed on the Standard Disclosure Form, Item # 1.

### **PROCEDURES FOR RESPONDING TO THIS RFP ANNOUNCEMENT:**

The following is a brief overview of the procedures to compete for the Award of the Professional Services Contract – more information is provided in the RFP: Print a copy of the RFP and review its contents thoroughly

1. On or before **September 1, 2020**: deliver six (6) copies of the RFP Response Documents listed above and any additional information requested in the RFP to the Township's designated Point of Contact

2. Supply a current resume of anyone listed on the Standard Disclosure Form Item # 1 to the Township's designated Point of Contact
3. Forward any questions pertaining to this RFP to the designated Point of Contact ONLY, as instructed below; and
4. Be prepared to respond to any additional requests for information and/or further directives

**COMMUNICATIONS:**

Any Applicants are hereby warned that, effective **July 1<sup>st</sup>, 2020** (the RFP Notice posting date) the only authorized communication of any kind regarding this RFP between the Township and any Applicant will be through the designated Point of Contact. Applicants or potential Applicants may only make inquiries for clarification of technical or administrative information. No other questions or forms of communication are authorized between the Township, its officials or employees and any entity associated with or representing the Applicant or potential Applicant after the RFP Notice posting date. This does not preclude the designated Point of Contact from contacting the Applicant and requesting additional information – by whatever means deemed necessary – in order to effectively manage the RFP Process. This policy will remain in effect until the RFP proceedings have closed. Any breach of this policy, whether intentional or otherwise, will result in immediate disqualification from the RFP Process.

**Communications are only authorized by mail, fax, or e-mail as stated below:**

1. Mail RFP response documents to the designated Point of Contact at the address listed below.
2. E-mail questions concerning the RFP to the designated Point of Contact at the e-mail address listed below. These E-mailed questions will be responded to in a timely manner as provided for in the RFP, Part A.
3. If requested or directed to, FAX information to the designated Point of Contact at the fax number listed below.

**DESIGNATED POINT OF CONTACT:**

**Amato, Start & Associates  
601 Broad St.  
Sewickley, PA 15143  
FAX Number: 412-749-0330  
schesney@sewickleylaw.com**

*Phone calls **will not** be accepted or returned*