Robeson Township pension system invites proposals for investment consulting, custodial, administrative, and actuarial services.

We are seeking a single service provider for all of the above listed services, but will consider proposals which are limited to one or more of the listed services. We will employ the enclosed Evaluation Process and will require evidence that the responder has a history of providing a complete package of services and/or such elements of the total package as the responder proposes to provide.

In responding to this request, please:

1. Identify and describe the specific professional services with respect to which you are proposing.
2. Describe your history and experience in providing such services.
3. Identify the limits, if any, of services provided under your proposed fee, and your fee schedule for other services.
4. Describe with particularity the nature and frequency of consultative services you will provide.
5. State whether your services include the providing of IRS qualified documents for governmental plans; and any additional cost associated with such documents.
6. Set forth any facts or factors, not otherwise addressed in this RFP, which you feel are relevant to the Trustees’ selection of professional service providers.
7. Limit your response to 26 pages.

All interested respondents must complete each section of the enclosed application and disclosure forms and forward eight (8) copies of each to

Robeson Township
Administrative Offices
8 Boonetown Road
Birdsboro, PA 19508

The postmark deadline for all proposals is April 8, 2019 at 12:00PM.
EVALUATION PROCESS

The evaluation of responses to this RFP and final decision will be conducted by the Robeson Township Board of Supervisors. The Board may appoint a committee to conduct preliminary evaluations and to recommend one or more finalists for further review and investigation.

The relevant factors that bear upon the Board’s decision will be summarized in a written statement to be included in the documents of award. Within ten (10) days after the award, the approved application, a summary of the basis for the award, and all required disclosure forms, will be transmitted to all unsuccessful applicants and posted at least seven (7) days prior to the execution of the document.

The criteria to be used shall center upon the responder’s qualifications, experience, expertise, proposed fee schedule, the Board’s prior experience with and knowledge of the responder, and the Board’s cumulative confidence in the successful responder. The evaluation process shall include, but not be limited to, consideration of the responder’s:

- commitment to assisting the Township in providing service to it and its participating employees.
- ability to provide continuing educational services
- experience in managing municipal pension funds
- ability to act as a fiduciary to the Township’s program
- knowledge of Act 205, Act 600, & Act 44
- ability to coordinate custodial services
- ability and commitment to provide administrative services
- ability to provide actuarial services
- ability to provide investment and other consultative services to the Township and participating employees
- the quoted fee and a description of rates and services which would fall outside of and be in addition to the quoted fee
- availability and willingness to attend meetings
- accurate and full disclosure of all items required by the letter and spirit of Act 44, including disclosure of all fund expense and revenue sharing arrangements associated with pension funds
- The Township’s prior experience in dealings with the responder