

**Proposal:
RFQ# 0802-04**

Third Party Administrator for 403(b) Administration

Date: February 29, 2008

| | Benefit Partners, Inc | CPI Qualified Plan Consultants | Gatekeeper | National Plan Administrators | Pen Serv Plan Services |
|---|--------------------------|-----------------------------------|------------|---------------------------------|---------------------------|
| Assessment of the firm's experience and expertise as a TPA of 403(b) Plans. (0-10pts) | 10 | 10 | 7 | 10 | 10 |
| Description of computerized system used to collect, assimilate and integrate program data. (0-15pts) | 7 | 15 | 10 | 15 | 15 |
| Availability of firm's key personnel to meet with District personnel and to respond promptly to requests for information and/or analysis. (0-5pts) | 5 | 5 | 5 | 5 | 5 |
| Awareness of legal requirements and changes and the inclination for the firm to aggressively pursue such and make timely reports and recommendations to the District. (0-20pts) | 20 | 20 | 20 | 20 | 20 |
| Ability of individuals to communicate information clearly and concisely both orally and in writing. (0-10 pts) | 10 | 10 | 10 | 10 | 10 |
| Ability to develop forms and plan documents to ensure ongoing compliance with IRS regulations and Texas Legislature requirements. (0-25pts) | 25 | 25 | 25 | 25 | 25 |
| Reasonableness of the proposed fee structure. (0-10pts) | 3 | 5 | 7 | 8 | 10 |
| References. (0-5pts) | 2 | 3 | 3 | 5 | 4 |
| Total Points | 82 | 93 | 87 | 98 | 99 |