

Proposal:**RFQ# 0802-04****Date: February 29, 2008****Third Party Administrator for 403(b) Administration**

	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