



Employee Benefits and Retirement Enrollment Administrative Services  
Executive Summary

**Lead Agency:** Region 4 ESC

**Solicitation:** 18-08

**RFP Issued:** April 26, 2018

**Pre-Proposal Date:** May 10, 2018

**Response Due Date:** May 24, 2018

**Proposals Received:** 1

**Awarded to:** TCG Consulting, LP

Region 4 ESC issued RFP 18-08 on April 26, 2018, to establish a national cooperative contract for employee benefits and retirement enrollment administrative services.

The solicitation included cooperative purchasing language in Section A.1 - Background:

*Region 4 Education Service Center ("Region 4 ESC" herein "Lead Public Agency") on behalf of itself and all state, local governments, school districts, and higher education institutions in the United States of America, and other government agencies and non-profit organizations (herein "Participating Agencies") solicits proposals from qualified Offerors to enter into a Vendor Contract ("contract") for the goods or services solicited in this proposal.*

*Contracts are approved and awarded by a single governmental entity, Region 4 ESC, and are only available for use and benefit of all entities complying with state procurement laws and regulations (public and private schools, colleges and universities, cities, counties, non-profits, and all governmental entities). These types of contracts are commonly referred to as being "piggybackable."*

*Region 4 ESC's purchasing cooperative was established in 1997 as a means to increase their economic and operational efficiency. The purchasing cooperative has since evolved into a National Cooperative used to assist other government and public entities increase their economical and operational efficiency when procuring goods and services.*

Notice of the solicitation was sent to potential offerors, as well as advertised in the following:

- Region 4 ESC website
- National IPA website
- USA Today, nationwide
- Arizona Business Gazette, AZ
- San Bernardino Sun, CA

- Honolulu Star-Advertiser, HI
- The Advocate – New Orleans, LA
- New Jersey Herald, NJ
- Times Union, NY
- Daily Journal of Commerce, OR
- The State, SC
- Houston Community Newspapers, Cy Creek Mirror, TX
- Deseret News, UT
- Richmond Times, VA
- Seattle Daily Journal of Commerce, WA
- Helena Independent Record, MT

On May 24, 2018 proposals were received from the following offerors:

- TCG Consulting, LP

The proposal was evaluated by an evaluation committee. Using the evaluation criteria established in the RFP and determining that the single response received was competitive based on past experience and price comparisons with previous contracts, the committee elected to enter into negotiations with TCG Consulting, LP and proceed with contract award upon successful completion of negotiations.

Region 4 ESC, National IPA and TCG Consulting, LP successfully negotiated a contract, and Region 4 ESC executed the agreement with a contract effective date of July 1, 2018.

Contract includes:

- Plan administration for Employee Benefits and Retirement Services
- Cyber Security Consulting
- Managed Asset Portfolio Program
- Administration services for Federal programs such as ACA, COBRA, and FMLA
- Other financial wellness solutions

Term:

Initial three year agreement from July 1, 2018 through June 30, 2021 with the option to renew for two (2) additional one-year periods through June 30, 2023.

Pricing/Discount:

Pricing is based on per-employee numbers for administrative services and on hourly rates for consulting services.

National IPA Web Landing Pages:

[http://www.nationalipa.org/Vendors/Pages/TCGGroupHoldingsLLC.aspx#ctl00\\_PlaceHolderMain\\_TabbedWebPart\\_tab1](http://www.nationalipa.org/Vendors/Pages/TCGGroupHoldingsLLC.aspx#ctl00_PlaceHolderMain_TabbedWebPart_tab1)