

AGENDA NOTES 2023-0232

Solicitation Name and #	RFP No. 22-500621 Investment Consulting and Procurement Record Keeping Services (Multiyear Contract):
Senior Procurement Agent	Brenda H. Redus
Date Solicitation bid prices expire.	May 9, 2023
Solicitation Name, Number and Contract Number of Expired Contract	RFP No. 15-500355 Investment Consulting and Procurement Record Keeping Services for 401(a) and 457 (b) Plan Contract No. 1002598
Contract Number, Contractor Name and Award Amount	<u>\$328,000.00</u>
Amount Spent on Previous Contract	<u>\$326,270.00</u>
Prime Contractor Information and LSBE - Subcontractor	<u>Segal Advisors, Inc. dba Segal Marco Advisors (Prime)</u> Frank Picarelli, Senior Vice President Years in Business: 54 Years Doing Business with DeKalb:7 <u>Fields Accounting Firm (LSBE –MSA) 20%</u> Ashley Fields, President and Principal Owner 1262 Concord Road., Ste 103, Smyrna, GA 30080 Years in Business: 7 Years in Business with DeKalb: 0 <i>Type of Work Provided: Audit and reconciliation.</i>
Attachments	• User Departments Recommendation • Cumulative Score Report • Evaluation Summary