



Legislation Details (With Text)

**File #:** 2021-3360    **Version:** 1    **Name:**  
**Type:** Resolution    **Status:** Preliminary Item  
**File created:** 11/8/2021    **In control:** Board of Commissioners  
**On agenda:** 12/14/2021    **Final action:** 12/14/2021

**Title:** Commission District(s): ALL  
CO - Change Order No. 2 to Contract No. 1002598 Investment Consulting and Procurement of Record Keeping Services for 401(a) and 457(b) Plan Requirements for use by the Department of Finance - Risk Management. This contract consists of providing investment consulting services to ensure the County offers quality sound investment options to employees. Awarded to Segal Advisors, Inc. (formerly Segal Rogerscasey) CONTRACT TERM EXTENSION ONLY.

**Indexes:**

**Attachments:** 1. Agenda Notes - 2021-3360, 2. UD Extension Request - 2021-3360

Date	Ver.	Action By	Action	Result
12/14/2021	1	Board of Commissioners	approved	Pass
12/7/2021	1	ERPS-Employee Relations & Public Safety Committee	recommended for approval.	Pass
12/7/2021	1	Committee of the Whole	Accepted to the BOC agenda and assigned	

**Purchasing Type:** Change Order (CO)

**Public Hearing:** YES  NO     **Department:** Purchasing & Contracting

**AGENDA ITEM:**

**Commission District(s):** ALL

CO - Change Order No. 2 to Contract No. 1002598 Investment Consulting and Procurement of Record Keeping Services for 401(a) and 457(b) Plan Requirements for use by the Department of Finance - Risk Management. This contract consists of providing investment consulting services to ensure the County offers quality sound investment options to employees. Awarded to Segal Advisors, Inc. (formerly Segal Rogerscasey) CONTRACT TERM EXTENSION ONLY.

**Information Contact:** Cathryn G. Horner, Chief Procurement Officer

**Phone Number:** (404) 371-6334

**PURPOSE:**

Awarded by the BOC on September 8, 2015 for an amount not to exceed \$328,000.00. On November 10, 2020 the BOC approved to extend the contract term for one (1) year to allow time to assess and revise the scope of work for a new solicitation and contract award. This request is to extend for additional time due to the Pandemic which has delayed the onsite in person solicitation/interview process.

**RECOMMENDATION:**

Recommend approval of Change Order No. 1 to extend the contract term to December 31, 2022 with:

Segal Advisors, Inc. (formerly Segal Rogerscasey), 333 West 34<sup>th</sup> Street, New York, NY 10001

and authorize the Chief Executive Officer to execute the change order and all associated documents.

**ADDITIONAL INFORMATION:**

- |                              |                   |
|------------------------------|-------------------|
| 1. Contract Effective Date:  | September 8, 2015 |
| 2. Contract Expiration Date: | December 31, 2021 |
| 3. Amount Spent To Date:     | \$316,270.00      |