



Metropolitan Water Reclamation District of Greater Chicago

100 East Erie Street
Chicago, IL 60611

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Title: Report on advertisement of Request for Proposal 17-RFP-13 Retiree Health Care Trust Investment Consulting Services, estimated cost \$300,000.00 Account P802-11000-798200

Sponsors:

Indexes:

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Date	Ver.	Action By	Action	Result
3/16/2017	1	Board of Commissioners	Published and Filed	Pass
3/16/2017	1	Committee of the Whole	Recommended	Pass

TRANSMITTAL LETTER FOR BOARD MEETING OF MARCH 16, 2017

COMMITTEE ON PROCUREMENT

Mr. David St. Pierre, Executive Director

Report on advertisement of Request for Proposal 17-RFP-13 Retiree Health Care Trust Investment Consulting Services, estimated cost \$300,000.00 Account P802-11000-798200

Dear Sir:

Request for Proposal documents have been prepared for Retiree Health Care Trust Investment Consulting Services, at the request of Treasury Department.

The purpose of this request for proposal is to provide assistance with the update of the investment policy and procedures; asset selection, allocation, and evaluation strategies; portfolio analysis; reporting; training; and other support services.

The estimated cost for this request for proposal is \$300,000.00 for a five-year service period.

A bid deposit is not required for this request for proposal.

Appendix A will not be included under this request for proposal due to the scope of work performed does not provide practical or cost-effective opportunities for direct or indirect subcontracting.

The tentative schedule for this contract is as follows:

Advertise April 5, 2017
Proposals Received April 28, 2017
Award August 3, 2017
Completion September 1, 2017

Retiree Health Care Investment Trust monies will be utilized to pay this expense. Funds are available in P802-11000-798200.

Requested, Mary Ann Boyle, Treasurer, MB: ST

Recommended, Darlene A. LoCascio, Director of Procurement and Materials Management

Respectfully Submitted, Barbara J. McGowan, Chairman Committee on Procurement

Disposition of this agenda item will be documented in the official Regular Board Meeting Minutes of the Board of Commissioners for March 16, 2017