



County of El Paso Purchasing Department
800 E. Overland Room 300
El Paso, Texas 79901
(915) 546-2048 / Fax: (915) 546-8180
www.epcounty.com

ADDENDUM 2

To: All Interested Proposers
From: Lucy Balderama, Procurement Data Analyst
Date: August 31, 2017
Subject: RFP #17-038, Internal Revenue Service Section 457 Deferred Compensation Plan for County Employees

This addendum has been issued to notify vendors of the following questions and modifications:

1. The excel questionnaire appears to be missing data on the Investments and Transition & Implementation tabs. Is there an updated spreadsheet?

Response: These items are purposefully left blank and are to be filled out by vendors submitting proposals.

2. Can you provide a list of assets for each provider, with ticker numbers if available?
Revised question: Please provide a list of assets currently offered under the plan for Nationwide, with ticker numbers if available.

Response: This information is posted on our website at www.epcounty.com click Bids & More; List of Bids. Click on attachment 1.

3. Please confirm the dollar amount of stable value/fixed assets with VOYA and VALIC.

Response:

- Valic \$474,017

- **Voya Approx. 3MM**

4. If the County chooses an exclusive provider, when will stable value/fixed assets from VOYA and VALIC be available? Will an MVA, CDSC or 12 month put apply? If so, please specify.

Response:

- **Valic - There are no surrender charges, MVA, or 12 month put; withdrawals from the Fixed Account Plus are limited to 20% annually while the participant is still in service.**
- **Voya- The fixed account would have a withdrawal restriction – (20% per year, essentially 4 years + 1 day to fully withdraw).**

5. Is the County Code of Ethics training module required for this type of contract? Is the training to be completed prior to the RFP or if/when the County enters into contract with the winning vendor?

Response: All vendors are required to take the Ethics Training. Please sign and date the Ethics Forms in the solicitation packet (page 3 & 4) and submit with your proposal to meet requirement.

6. What is the current investment lineup per vendor?

Response: VALIC's Portfolio Director Fixed and Variable Annuity options listed on the attachment.

Voya - There are 44 investment options covering multiple asset classes in the contract.

7. What are current investment fees charged to participant?

Response: Valic -This information is posted on our website at www.epcounty.com click Bids & More; List of Bids. Click on Attachment 2.

Voya- The expenses range from 0.34% to 1.37%.

8. Do participants currently pay a per-participant fee? If so, what is the fee?

Response: No. There is not a per participant fee.

9. How many group seminars were conducted last year?

Response: The County held six (6) health fair events last year where vendors participated.

10. How many individual meetings were conducted last year?

Response: The County had at least one (1) vendor once a month hold individual meetings onsite for a full day.

11. What is the reason the county is issuing the RFP?

Response: The contract term has expired.

12. Are the current providers Nationwide, VALIC and Voya eligible to re-bid?

Response: Yes.

Note:

- See attached updated Conflict of Interest Form.



COUNTY OF EL PASO
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El Paso, Texas 79901
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RE: RFP # 17-038, Internal Revenue Service Section 457 Deferred Compensation Plan for County Employees

Dear Vendor:

The Texas Local Government Code Chapter 176 requires all vendors and potential vendors who contract or seek to contract for the sale or purchase of property, goods, or services with any local government entity to complete and submit a Conflicts of Interest Questionnaire. Attached is a copy of the Questionnaire.

In filling out the Questionnaire, the following are the County Officers that will award the bid and the employees which will make a recommendation to the Commissioners' Court:

County Officers: County Judge Veronica Escobar
Commissioner Carlos Leon
Commissioner David Stout
Commissioner Vincent M. Perez
Commissioner Andrew Haggerty

County Employees: Debra Carrejo CPPO, CPPB-Purchasing Agent
Jose Lopez, Jr., Assistant Purchasing Agent
Peter Gutierrez, Buyer II
Betsy Keller, County Administrator
Elvia Jauregui, Formal Bid Supervisor/Buyer
Blanca Carbajal, Inventory Bid Technician
Lucy Balderama, Inventory Bid Technician
Edward Dion, County Auditor
Wallace Hardgrove, Budget & Financial Manager
Lee Shapleigh, Assistant County Attorney
Diane Shearer, Assistant County Attorney
Ian R. Kaplin, Assistant County Attorney
Michael Martinez, Administration
Lorena Rodriguez, Analyst
Sam Trujillo, Deputy Human Resources Officer
Lorena Heredia, Deputy Chief of Finance and Support (JPD)
Angie Castillo, Civilian Evidence Clerk (Sheriff's Office)
James Utterback, County Auditor Manager
Kassandra Delgado, Expungement Specialist (County Clerk)
Melissa M. Carrillo, Chief HR Officer
Verenice Acosta, Human Resources Supervisor

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.
 This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).
 By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.
 A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY	
Date Received	

1 Name of vendor who has a business relationship with local governmental entity.

2 **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity Date