



TOWNSHIP OF WARWICK

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July 19, 2017

Re: Summary of Award Notice/ Proposal for 401A Advisory Services

Warwick Township, after careful consideration of all information presented, which included a detailed review and analysis process, has awarded the 401A Advisory Services contract to CBIZ InR Advisory Services, 115 West State Street, Suite 300, Media, PA 19063.

In satisfaction of our responsibilities under Pennsylvania's Act 44 of 2009, the following is a summary of events and actions resulting in the award:

- Preparation and advertisement of RFP for Professional Services including application stating that disclosure form and proposal are true and correct and requiring signature.
- Receipt of proposals via Pennbid.
- Pre-screen check for each proposal, reviewing for proposal completeness.
- Application completeness reviewed to determine which applicants would be considered.
- Three advisors' proposals reviewed by selection committee and one chosen for an interview.
- Interview of finalist was held on 6/26/18.
- The most qualified applicant selected by the Selection Committee was based on the application, proposal, presentation, answers to questions and the evaluation selection criteria which included past record of performance, quality and content of written proposal/ interview presentation, specialized experience and technical competence of the firm team, familiarity of the firm with applicable PA statutes and Township regulations, the type of local issues and potential alternatives applicable to Township needs, understanding of and agreement with the firm's approach and methodology including the Township's general feeling of confidence in the firm to perform the work and cost. Five out of five member of the Selection Committee chose the selectee as the number one candidate.
- Recommendation to Board of Supervisors of Warwick Township.
- Original application from CBIZ InR is attached.

Should you have any questions related to this award, please contact Becki Wilhelm at 215-343-6100, extension 210.