

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
PROPOSAL TABULATION**

Evaluation Criteria	Maximum # of Pages	# of Points Possible	American Fidelity	Mid America	Plan Connect	TCG	TSA	US Omni
Background and Organizational Information of your Firm.	5	10	9.25	9.00	8.75	9.38	10.00	9.63
Organization references and personnel information	3	15	13.50	13.25	9.75	13.00	14.25	11.50
Administration and Compliance Procedures	5	20	18.00	18.50	18.50	18.75	18.25	17.25
Employee Account Administration	3	15	13.25	14.00	13.25	14.50	14.63	14.25
Fees and Expenses	2	20	18.50	16.75	19.00	19.13	18.75	19.00
Completion of the Questionnaire	N/A	10	10.00	9.50	10.00	9.75	10.00	10.00
Interview Responses	N/A	10	N/A	N/A	N/A	5.00	4.00	10.00
Total Score								
			82.50	81.00	79.25	89.50	89.88	91.63

Recommended as the best evaluated proposal -

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
AMERICAN FIDELITY SCORE SHEET**

<u>Evaluation Criteria</u>	<u>Employee #1</u>	<u>Employee #2</u>	<u>Employee #3</u>	<u>Employee #4</u>	<u>Total</u>
Background and Organizational Information of your Firm	8.00	9.00	10.00	10.00	9.25
Organization references and personnel information	11.00	15.00	15.00	13.00	13.50
Administration and Compliance Procedures	15.00	17.00	20.00	20.00	18.00
Employee Account Administration	13.00	11.00	15.00	14.00	13.25
Fees and Expenses	19.00	15.00	20.00	20.00	18.50
Completion of the Questionnaire	10.00	10.00	10.00	10.00	10.00
Total Score					82.50

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
MID AMERICA SCORE SHEET**

<u>Evaluation Criteria</u>	<u>Employee #1</u>	<u>Employee #2</u>	<u>Employee #3</u>	<u>Employee #4</u>	<u>Total</u>
Background and Organizational Information of your Firm	9.00	9.00	10.00	8.00	9.00
Organization references and personnel information	13.00	15.00	15.00	10.00	13.25
Administration and Compliance Procedures	17.00	20.00	20.00	17.00	18.50
Employee Account Administration	14.00	15.00	15.00	12.00	14.00
Fees and Expenses	16.00	14.00	20.00	17.00	16.75
Completion of the Questionnaire	9.00	9.00	10.00	10.00	9.50
Total Score					81.00

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
PLAN CONNECT SCORE SHEET**

<u>Evaluation Criteria</u>	<u>Employee #1</u>	<u>Employee #2</u>	<u>Employee #3</u>	<u>Employee #4</u>	<u>Total</u>
Background and Organizational Information of your Firm	8.00	7.00	10.00	10.00	8.75
Organization references and personnel information	12.00	9.00	10.00	8.00	9.75
Administration and Compliance Procedures	18.00	16.00	20.00	20.00	18.50
Employee Account Administration	14.00	9.00	15.00	15.00	13.25
Fees and Expenses	19.00	18.00	20.00	19.00	19.00
Completion of the Questionnaire	10.00	10.00	10.00	10.00	10.00
Total Score					79.25

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
TCG SCORE SHEET**

<u>Evaluation Criteria</u>	<u>Employee #1</u>	<u>Employee #2</u>	<u>Employee #3</u>	<u>Employee #4</u>	<u>Total</u>
Background and Organizational Information of your Firm	8.50	9.00	10.00	10.00	9.38
Organization references and personnel information	13.00	12.00	15.00	12.00	13.00
Administration and Compliance Procedures	19.00	20.00	18.00	18.00	18.75
Employee Account Administration	15.00	15.00	15.00	13.00	14.50
Fees and Expenses	19.50	20.00	20.00	17.00	19.13
Completion of the Questionnaire	10.00	10.00	9.00	10.00	9.75
Total Score					84.50

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
TSA SCORE SHEET**

<u>Evaluation Criteria</u>	<u>Employee #1</u>	<u>Employee #2</u>	<u>Employee #3</u>	<u>Employee #4</u>	<u>Total</u>
Background and Organizational Information of your Firm	10.00	10.00	10.00	10.00	10.00
Organization references and personnel information	14.00	15.00	15.00	13.00	14.25
Administration and Compliance Procedures	16.00	17.00	20.00	20.00	18.25
Employee Account Administration	13.50	15.00	15.00	15.00	14.63
Fees and Expenses	19.00	18.00	20.00	18.00	18.75
Completion of the Questionnaire	10.00	10.00	10.00	10.00	10.00
Total Score					85.88

**THE KENTON COUNTY SCHOOL DISTRICT
THIRD PARTY ADMINISTRATION - 403B
US OMNI SCORE SHEET**

Evaluation Criteria	Employee #1	Employee #2	Employee #3	Employee #4	Total
Background and Organizational Information of your Firm	9.50	9.00	10.00	10.00	9.63
Organization references and personnel information	15.00	9.00	10.00	12.00	11.50
Administration and Compliance Procedures	19.50	18.50	16.00	15.00	17.25
Employee Account Administration	15.00	15.00	12.00	15.00	14.25
Fees and Expenses	19.00	19.00	20.00	18.00	19.00
Completion of the Questionnaire	10.00	10.00	10.00	10.00	10.00
Total Score					81.63