

The City of Erie Pension Funds which includes the Officers & Employees Retirement Fund, Police Relief & Pension Fund and the Firefighters' Pension Fund invite qualified attorneys and/or law firms, licensed in Pennsylvania, to submit proposals to provide legal services to the funds listed herein. Such counsel will advise the board on all aspects of municipal pension law, often in coordination with the Office of the City Solicitor. Interested parties should submit a proposal in accordance with the requirements and directions described herein. Proposals are due on February 8, 2017.

I. BACKGROUND

The City of Erie Pension Plans are defined pension plans. The City of Erie Aggregated Pension Fund was created on November 25, 1987 by City Council Ordinance #76, establishing an aggregated pension trust fund consisting of three (3) pension funds of the City creating a board of trustees for the management and administration of said pension trust fund and setting forth certain procedures regarding actuarial valuation and auditing of same.

The Board appointed KeyBank as custodian for all Plan assets. Dahab Associates was appointed by the Board as its investment consultant, and Northwest Retirement Services was appointed as its consulting actuary. As of December 31, 2016 the City of Erie Pension Funds has an aggregated amount of approximately \$235 assets under management.

II. SCOPE OF SERVICES

The successful attorney/law firm will be required to perform the following legal services for the City of Erie Pension Funds:

- Review, and as necessary, revise Pension ordinances;
- Revise and update Plan Documentation;
- Update the City of Erie Pension Fund Board(s) on relevant changes in law;
- Provide general legal advice regarding the administration of the City of Erie Pension Funds;
- The principal attorney may be requested to attend meetings of the City of Erie Pension Fund Board(s);
- Other legal services as may be required from time to time by the City of Erie Pension Fund

III. PROPOSAL

Proposal should include a profile of your firm, including its relevant background and experience. Give the location of the office from which the work is to be done and the number of professional staff employed at that office. State whether the firm is local, regional, national or international. Briefly describe the range of services performed by said office.

Include references regarding your firm's experience in providing legal advice for governmental entities and their pension funds. Provide three (3) references of clients who might be contacted regarding your firm's work.

Provide a brief resume of each attorney and other staff assigned to perform work for the Board(s). Indicate whether each such person is registered or licensed to practice as an attorney in Pennsylvania. Provide information on the governmental legal advisory experience of each person.

Lead attorney and other staff may be changed if those personnel leave the firm, are promoted or are assigned to another office. These personnel may also be changed for other reasons with the express prior written permission of the Board(s). However, in either case, the Board(s) will retain the right to approve or reject replacements.

Other personnel may be changed at the discretion of the proposer provided that replacements have substantially the same or better qualifications or experience.

Provide a letter of transmittal indicating your understanding as to the scope of the work requested. This letter should include the name(s) of the person(s) who will be authorized to represent your firm.

There is no expressed or implied obligation for the Board(s) to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

At the discretion of the Board(s), firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

The Board(s) reserve(s) the right to retain all proposals submitted and use any idea in a proposal regardless of whether the proposal is selected.

The proposal must be signed by the principal attorney and must state the name, title, address, phone number, fax and email address of a contact person authorized to provide clarification of the proposal should it be necessary.

IV. FEES

A detailed proposal regarding expenses involved including any retainer, hourly rates of personnel providing these services, required expenses and other costs involved.

V. SUBMISSION

Two copies of the RFP response and any related materials must be received in the City of Erie Controller's Office, 626 State Street, - Room 302, Erie, PA 16501 by 3pm on February 8, 2017 Eastern Standard Time. Please also submit PDF copy to tpomorski@erie.pa.us.