

11- R -1300

(Do Not Write Above This Line)

First Reading

Committee \_\_\_\_\_  
Date \_\_\_\_\_  
Chair \_\_\_\_\_  
Referred To \_\_\_\_\_

FINAL COUNCIL ACTION  
 2<sup>nd</sup>     1<sup>st</sup> & 2<sup>nd</sup>     3<sup>rd</sup>  
Readings  
 Consent     V Vote     RC Vote

A RESOLUTION  
BY FINANCE/EXECUTIVE COMMITTEE

A RESOLUTION AUTHORIZING THE MAYOR, ON BEHALF OF THE CITY, TO ENTER INTO A CONTRACT WITH THE AYCO SERVICES AGENCY LP FOR FC-5365, FINANCIAL EDUCATION, FOR THE PURPOSE OF PROVIDING FINANCIAL EDUCATION SERVICES RELATED TO THE CITY'S NEW RETIREMENT PLAN IN AN AMOUNT NOT TO EXCEED SEVEN HUNDRED THOUSAND DOLLARS (\$700,000.00); WHERE ALL FUNDS SHALL BE CHARGED TO AND PAID FROM ACCOUNTS GENERAL FUND: 1001 220203 5212001 1540000; WATER AND WASTEWATER REVENUE FUND: 5051 220203 5212001 1540000; AVIATION REVENUE FUND: 220203 5212001 1540000; AND FOR OTHER PURPOSES.

**ADOPTED BY**  
SEP 06 2011

Committee Finance/Executive

Date 8/31/11

Chair Jaduan  
Action \_\_\_\_\_

Fav, Adv, Hold (see rev. side)  
Other \_\_\_\_\_

Members  
[Signatures]

Refer To \_\_\_\_\_

Committee \_\_\_\_\_

Date \_\_\_\_\_

Chair \_\_\_\_\_

Action \_\_\_\_\_  
Fav, Adv, Hold (see rev. side) \_\_\_\_\_  
Other \_\_\_\_\_

Members \_\_\_\_\_

Refer To \_\_\_\_\_

CERTIFIED  
SEP 06 2011  
COUNCIL PRESIDENT PROTEM

CERTIFIED  
SEP 06 2011  
Rhonda Vaughan Johnson  
MUNICIPAL CLERK

- CONSENT REFER
- REGULAR REPORT REFER
- ADVERTISE & REFER
- 1<sup>ST</sup> ADOPT 2<sup>ND</sup> READ & REFER
- PERSONAL PAPER REFER

**COUNCIL**

Committee \_\_\_\_\_  
Date \_\_\_\_\_  
Chair \_\_\_\_\_  
Action \_\_\_\_\_  
Fav, Adv, Hold (see rev. side) \_\_\_\_\_  
Other \_\_\_\_\_

Members \_\_\_\_\_

Refer To \_\_\_\_\_

Committee \_\_\_\_\_  
Date \_\_\_\_\_  
Chair \_\_\_\_\_  
Action \_\_\_\_\_  
Fav, Adv, Hold (see rev. side) \_\_\_\_\_  
Other \_\_\_\_\_

Members \_\_\_\_\_

Refer To \_\_\_\_\_

MAYOR'S ACTION

**APPROVED**

SEP 15 2011

WITHOUT SIGNATURE  
BY OPERATION OF LAW

Date Referred

Referred To:

Date Referred

Referred To:

Date Referred:

Referred To:



**CITY OF ATLANTA  
GOVERNMENT EXECUTIVE COMMITTEE**

**11- R -1300**

**A RESOLUTION AUTHORIZING THE MAYOR, ON BEHALF OF THE CITY, TO ENTER INTO A CONTRACT WITH THE AYCO SERVICES AGENCY LP FOR FC-5365, FINANCIAL EDUCATION, FOR THE PURPOSE OF PROVIDING FINANCIAL EDUCATION SERVICES RELATED TO THE CITY'S NEW RETIREMENT PLAN IN AN AMOUNT NOT TO EXCEED SEVEN HUNDRED THOUSAND DOLLARS (\$700,000.00); WHERE ALL FUNDS SHALL BE CHARGED TO AND PAID FROM ACCOUNTS GENERAL FUND: 1001 220203 5212001 1540000 (\$300,000.00); WATER AND WASTEWATER REVENUE FUND: 5051 220203 5212001 1540000 (\$296,000.00); AVIATION REVENUE FUND: 5501 220203 5212001 1540000 (\$104,000.00); AND FOR OTHER PURPOSES.**

**WHEREAS**, the City of Atlanta (the "City") passed legislation on June 29, 2011 that reformed the City's retirement plan for employees; and

**WHEREAS**, the new retirement plan takes effect on November 1, 2011 for employees hired before September 1, 2011; and

**WHEREAS**, the City wants to provide employees with education about the new retirement plan and financial retirement planning in general to assist employees as they decide how to participate in the new retirement plan; and

**WHEREAS**, the City's Department of Human Resources determined a need to acquire financial education services in order to accomplish this goal; and

**WHEREAS**, the City's Department of Procurement advertised for FC-5365, Financial Education; and

**WHEREAS**, qualified firms submitted proposals for the right to perform product neutral financial education services for the City; and

**WHEREAS**, after reviewing and evaluating responsive offers, the Commissioner of the Department of Human Resources and the Chief Procurement Officer have recommended that the two most responsive offerors be awarded contract FC-5365, where each offeror will perform a defined segment of the educational services. They recommend that The Ayco Services Agency LP ("Ayco") be awarded a contract in an amount not to exceed seven hundred thousand dollars (\$700,000) for performance of product-neutral group education sessions, creation of a web site, operation of a phone center, and creation of educational collateral. They recommend that N.T.R.C., P.C. Inc. be awarded a contract in an amount not to exceed two hundred twenty-five thousand dollars (\$225,000) for performance of individual product-neutral financial counseling. This second contract will be authorized under separate legislation; and

**WHEREAS**, the contract shall have an initial term of one year, with two one-year renewal options at the sole discretion of the City; and



**THE CITY COUNCIL OF THE CITY OF ATLANTA, GEORGIA, HEREBY RESOLVES** as follows.

**SECTION 1:** The Mayor, on behalf of the City, is authorized to enter into a contract (the “Ayco Contract”) with The Ayco Services Agency LP, for FC-5365, Financial Education, for the purpose of providing product-neutral retirement-related financial education services in an amount not exceed to seven hundred thousand dollars (\$700,000). The Ayco Contract shall have an initial term of one year, with two one-year renewal options at the sole discretion of the City.

**SECTION 2:** All work performed pursuant to the Ayco Contract shall be charged to and paid from the following accounts in the amounts indicated below:

**SECTION 3:** The Chief Procurement Officer or his designee is hereby directed to prepare the Ayco Contract for approval as to form by the City Attorney or her designee, and for execution by the Mayor.

**SECTION 4:** The Ayco Contract shall not become binding upon the City, and the City shall incur neither obligation nor liability there under until the Ayco Contract has been signed by the Mayor, executed by the City Clerk, and delivered to Ayco.

A true copy,



Deputy Municipal Clerk

ADOPTED by the Atlanta City Council  
APPROVED as per City Charter Section 2-403

Sept. 6, 2011  
Sept. 15, 2011

RCS# 1358  
9/06/11  
2:37 PM

Atlanta City Council

REGULAR SESSION

CONSENT

CONSENT AGENDA SECTION I

ADOPT

YEAS: 11  
NAYS: 0  
ABSTENTIONS: 0  
NOT VOTING: 3  
EXCUSED: 0  
ABSENT 2

Y Smith	NV Archibong	Y Moore	Y Bond
Y Hall	Y Wan	Y Martin	B Watson
Y Young	NV Shook	NV Bottoms	Y Willis
Y Winslow	Y Adrean	Y Sheperd	B Mitchell

CONSENT