



NEW HAVEN PUBLIC SCHOOLS

## COVER SHEET

**Cover Sheet is an Internal Document for Business Office Use**

### Please Type

Contractor full name: Northwest Investment Consulting, Inc.

Doing Business As, if applicable: Northwest Plan Services (NWPS)

Business Address: 15130 Main St Suite 300 Mill Creek, WA 98012

Business Phone:

Business email:

Principal or Supervisor:

Agreement Effective Dates: From 10/1/2022 to 06/30/2023

Total amount: \$24,400.00

Funding Source & Acct # including location code: 190-43100-50190

Description of Service: Please provide a one or two sentence description of the service. *Do not write, "See attached."*

Agreement with Northwest Investment Consulting, Inc. to provide administrative plan services for Paraprofessionals Money Purchasing Plan, from October 1, 2022 to June 30, 2023, in an amount not to exceed \$24,400.00.

Submitted by: Michael Gormany



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## Operations Memorandum

**To:** New Haven Board of Education Finance and Operations Committee  
**Date:** September 27, 2022  
**Re:** Agreement with Northwest Plan Services for Paraprofessionals Money Purchasing Plan.

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Please **answer all questions** and have someone **ready to discuss** the details of each question during the Finance & Operations meeting or this proposal might not be advanced for consideration by the full Board of Education.

**Contractor Name:** Northwest Investment Consulting, Inc. dba Northwest Plan Services

**Contractor Address:** 15130 Main St Suite 300 Mill Creek, WA 98012

**Is the contractor a Minority or Women Owned Small Business?** No

**Renewal or Award of Contract/Agreement?** Agreement

**Total Amount of Contract/Agreement and the Hourly or Service Rate:** \$24,400.00

**Contract or Agreement #:** N/A

**Funding Source & Account #:** 190-43100-50190

### Key Questions:

**1. What specific service will the contractor provide:**

The plan will provide the following administration services:

Enrollment materials, data collection, database establishment, earnings allocation, transaction processing and fund accounting, employee statements, individual combined contribution limits, plan level compliance, etc.

**2. How was the contractor selected? Quotes? RFP? Sealed Bid or Sole Source? Please describe the selection process including other sources considered and the rationale for selecting this method of selection:**

The PMPP's financial advisor found an alternative bookkeeping company (limited companies).

**3. If the vendor is not the lowest bidder or a State contract please answer the following:**

**a. Please explain why the vendor was chosen?** N/A

**b. Who were the members of the selection committee?**



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## Operations Memorandum

4. **If this is a renewal with a current vendor, has the vendor's performance been satisfactory under the existing contract or agreement? N/A**
  
5. **If this Contract/Agreement is a Renewal has cost increased? If yes, by how much? N/A**
  
6. **If this Contractor is New has cost for service increased from previous years? If yes, by how much? N/A**
  
7. **Is this a service existing staff could provide? Why or why not?** This company specializes in this type services for the district, and will aid in processing submissions for the Paraprofessionals Money Purchase Plan. (PMPP)