



AN EARLY COLLEGE DISTRICT

# BROWNSVILLE

INDEPENDENT SCHOOL DISTRICT

**Dr. Renè Gutiérrez**  
Superintendent of Schools

**David Robledo**  
Chief Financial Officer

To: Brownsville I.S.D. Awarded Vendors

From: Rosario Peña, RTSBA  
Purchasing Administrator

*Delia Robledo  
For  
R. Peña*

Date: May 4, 2022

Subject: CSP# 22-115 / Third Party Administrator (TPA) Services for Retirement Plan (403 & 457)

On May 3, 2022 the Brownsville I.S.D. Board approved the recommendations Third Party Administrator (TPA) Services for Retirement Plan (403 & 457). The policy period is June 1, 2022 to May 31, 2024.

Awarded vendors, please note that in order to visit a campus/department, you need to present this letter. Please do not process order(s) until you have received the official original purchase order document issued by Brownsville ISD.

Vendors by accepting a purchase order from Brownsville ISD, your company under penalties of perjury is complying with Senate Bill 9 and proof must be submitted to the Purchasing Office prior to performing any service(s). This bill states that all vendors' employees, subcontractors, and volunteers who have contact with students must have passed a criminal history background check current within the last year. Please visit our website if further information is needed.

**Awarded Vendors**

US OMNI & TSACG Compliance Services  
(Rochester, NY)

For additional information or questions, please contact the Purchasing Department:

Marisela Ayala, Senior Buyer  
956-548-8361 / mayala@bisd.us

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# Brownsville Independent School District

Agenda Category: Bids/Proposals Board of Education Meeting: 05/03/2022

|             |  |                   |             |
|-------------|--|-------------------|-------------|
| Item Title: | <u>CSP# 22-115 Third Party Administrator</u> | <u>X</u>          | Action      |
|             | <u>(TPA) Services for Retirement Plan</u>    | <u>          </u> | Information |
|             | <u>(403 &amp; 457)</u>                       | <u>          </u> | Discussion  |

### BACKGROUND:

The Brownsville Independent School District issued Competitive Sealed Proposals for the Third Party Administrator (TPA) Services for Retirement Plan (403 & 457) for the 2022-2023 school year, with (2) two proposals received. The policy period is June 1, 2022 to May 31, 2024. The proposal provides administrative services for the retirement plans as well as meet all required IRS guidelines pertaining to tax deferred retirement savings plans, monitor contributions and loan requests, and provide a single source billing/reconciliation.

### FISCAL IMPLICATIONS:

No cost to the District or Participants.

### RECOMMENDATION:

Recommend awarding CSP #22-115 Third Party Administrator (TPA) Services for Retirement Plan (403 & 457) to US OMNI & TSACG Compliance Services of Rochester, NY at no cost to the District or Participants. The policy period is June 1, 2022 to May 31, 2024.

|  |                       |  |
|--|-----------------------|--|
| <u>David Robledo</u>                       | <u>Rosario Peña</u>   | Approved for Submission to Board of Education: |
| Submitted by: Director/Purchasing Director |                       |  |
| <u>/David Robledo</u>                      | <u>Rene Gutierrez</u> |  |
| Recommended by: CFO                        | Dr. René Gutiérrez    | Superintendent                                 |
| <u>Dr. Nellie Cantu</u>                    |                       |  |
| Approved by: Deputy Superintendent         |                       |  |

When Necessary, Additional Background May Follow This.