Recordkeeping and Member Education Search:

			2014 May	June	e	July	Augt	ust	September		October	Noveml	er D		January		February	Ma	rch	April	1	May	J	une	July		August	Senter	mber	October	November	r D
ECT	RESPONSIBILITY TASK		16 23	30 6 13	20 27	4 11 18	25 1 8	15 22 29	5 12 1	9 26 3	10 17 24	31 7 14	21 28 5	12 19 26	2 9 10	23 30	6 13 20	27 6 1	3 20 27	3 10 17	24 1	8 15 22	29 5	12 19 26	3 10 17	24 31 7	14 21	28 4 11	18 25 2	October 9 16 COM 23	30 6 13 20	27 4
FP	Mercer • Evaluation Mercer • Minimum Mercer • Technicat Mercer • Pricing q	'work kground information on critieria n qualifications n qualifications l questionnaire questionnaire fic RFP format																														
RFP	Mercer • Updates : Mercer/NC • Add NC t	te 3 rounds of review/edit to draft based on comments terms and conditions listribution list																														
P	Mercer/NC • Vendor qu	conference questions e to vendor questions																														
Proposals	Mercer - Company Mercer - Scope of Mercer - Scope of Mercer - Education Mercer - Investme Mercer - Asset all Mercer - Asset all Mercer - Froposea Mercer - Scoring of Mercer - Report pi Mercer - Evaluation	minimum quelifications y background and experience exceptions exceptions equip and administrative services on and communication services on and colonial services ocation tool Goalmaker capabilities managed accounts of es of proposals reparation on meeting of finalists																														
Finalists	Mercer/NC • Site visits Mercer/NC • Selection																															
g	Mercer/NC • Negotiati Mercer/NC • Review d.	ion trafted contract from vendor : of edits and negotiation																														
ation	Mercer/NC • Review or Mercer • Trust and Mercer/NC • Advice an Mercer • Investmer Mercer • Asset alle	ransition plan communication plan de austodial plan und managged accounts nut structure changes, if applicable occation, GoalMaker target-date, or other solution																	implementation	n tikely 6 months→												
	Mercer/NC • Vendor h.	ransition website itier staff if needed esting of records implementation status meetings of communication materials ant meetings by vendor																														
	Mercer/NC • Transitio	on of records t period and reconciliation of records																														