Town of Plymouth Retirement Board
Request for Proposal to Provide Legal Services

The Town of Plymouth Retirement Board is seeking a law firm or attorney with experience representing Massachusetts public pension boards or systems to provide legal services.

The Town of Plymouth Retirement Board ("Board") administers the pension system serving the Town of Plymouth. The Board manages approximately $234 million in assets and employs a staff of 4 in its office located in Plymouth, Massachusetts.

Qualified respondents will have established experience servicing Massachusetts public fund retirement plans and proficiency with MGL Chapter 32 and Commonwealth of Massachusetts Regulations (840 CMR) Public Employee Retirement Administration Commission (PERAC).

Attorneys/law firms must submit a proposal to be considered. The information submitted in the proposal, including experience, qualifications, and a fee schedule, will be reviewed for the purpose of selecting a firm to provide legal representation. Please refer to the instructions on the third page. Favorable fees will be a factor in the selection process; however, the attorney's/firm's experience, qualifications, resources, and level of proposed services will be key factors in determining the attorney/firm to represent the Board.

It is anticipated that the Board will select one attorney/firm that will serve for a seven-year period. The Board will act as the qualifications-based selection committee. The selection committee will evaluate the proposals as highly advantageous, advantageous, not advantageous, or unacceptable based on the evaluation criteria and will state reasons for the rating. The selection committee will then develop a composite rating. A short list of attorneys/ firms to be interviewed will be selected from the composite rating list. After the interview process, the Board will designate its choice of attorney/firm. The Board will ultimately negotiate an arrangement for services with the selected attorney/firm.

The Board reserves the right to reject any and all proposals or parts thereof in the best interest of the Retirement System. The Board also reserves the right to waive any irregularities, inconsistencies, and bidding provisions or to take whatever other action that is in the retirement system's best interest as determined by the Board.

The selected attorney/firm must file all disclosures as required by the Public Employee Retirement Administration Commission (PERAC) as part of the RFP process. These disclosures include disclosure of conflict of interest, disclosure of compensation received, disclosure of compensation paid, and a vendor certification of good faith.

The Board intends to select up to three (3) attorneys/firms to be interviewed. The candidates selected for an interview should send a representative attorney who will be the primary contact person for the Board. Interviews are tentatively scheduled to occur in January 2023. The Board hopes to select an attorney/firm and negotiate a service agreement within 120 days from the submission deadline.

Your original proposal, including fee information, should be submitted on or before 4:00 PM, EST, on December 1, 2022. The proposal should be titled "Legal Services RFP" and emailed to the attention of Wendy Cherry. Each proposal shall be considered binding and in effect for a period of ninety (90) days following the submission date.

Instructions for Submitting a Proposal

A. The proposal may cover any areas which you deem to be relevant. The Legal Services RFP should not exceed twelve (12) pages and should minimally include the following information:

- Provide a summary of related legal experience including a list of current or former Massachusetts public retirement board or system clients. Said list should include the commencement date and end date of representation with each client.

- Each candidate must represent at least five (5) Massachusetts Retirement Boards and provide a list of same.

- Provide the name and brief biographical sketches of attorneys who will be generally responsible for providing related legal services including, but not limited to, years in the practice of law, education, and other relevant background information.

- Describe the firm's policy on staffing for deposition, trial work, and rate increases, if applicable.

- Describe any potential conflicts of interest, whether past or pending, which exist with the Town of Plymouth Retirement Board or its members.

B. The information relative to fees should:

- List your hourly fees.

- List charges, if any, for telephone calls, file review, copying, facsimile, transmission, messenger service, etc.

- Describe the attorney or firm's billing procedure, i.e. monthly, bi-monthly or otherwise.

- List those items for which the firm will expect reimbursement including, but not limited to travel related costs.

Please direct questions pertaining to this RFP to Wendy Cherry at wendy@plymouthretirement.com.

Submit one complete electronic copy via email to:

Wendy Cherry, Director
wendy@plymouthretirement.com
Town of Plymouth Retirement System
212 South Meadow Road, Unit 3
Plymouth MA 02360

Submission of RFP: Proposals are due on or before Thursday, December 1, 2022, at 4:00 PM EST**.** Late proposals will not be accepted.

Opening of Proposals: Friday, December 2, 2022, at 9:00 AM EST**.**