



Title of Project

**SAN BERNARDINO COUNTY DEFINED CONTRIBUTION PLANS
RECORDKEEPER REQUEST FOR PROPOSAL (RFP) RESULTS**

Category

PLAN DESIGN & ADMINISTRATION

COVID-19 Response Award?

YES

Project Implementation Date

JULY 1, 2021

Plan Asset Size

1,524,107,280

PROJECT DESCRIPTION

San Bernardino County ("County") sponsors several full-time retirement plans, including a 457 Plan, 401(a) Plan, 401(k) Plan, Part-time/Seasonal/Temporary ("PST") Plan, and Retirement Medical Trust ("RMT") (Collectively "Plans"). The Plans have approximately 28,000 full-time participants and 7,800 part-time participants. They are overseen by a nine-member Defined Contribution Committee ("Committee").

In 2020, the Committee made enhancements to the investment lineup. After thorough review, over 55% (\$762 million) of the investment options were improved either by cost, structure, or category.

In 2021, it was time for the recordkeeping RFP. The previous RFP had been completed in 2014. The seven-year contract was expiring. For many Plans, the recordkeeper RFP process can have the greatest impact on participant retirement outcomes. The Committee was very aware of the importance of the RFP process. An RFP Evaluation Subcommittee ("Subcommittee") was formed, consisting of existing Committee members. This Subcommittee knew of the challenge to further improve the Plans, especially during a persistent pandemic. They were up to the task.

The Subcommittee began meeting regularly, albeit virtually. As a result of these meetings, the Subcommittee assembled key criteria, customizing plan goals, and prioritizing some over others. One goal made it to the top of the list.

While the Subcommittee acknowledged the need to evaluate the great tools and resources made available to participants, they also knew that not all participants utilize these tools and resources. Instead, what do all participants do?

THEY PAY FEES.

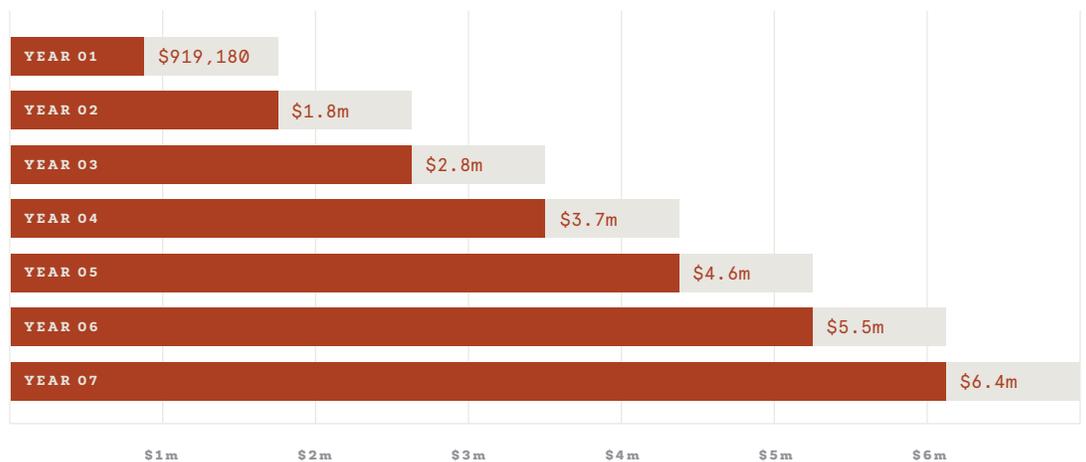
Key Goal:

REDUCE RECORDKEEPING FEES.

Thus, the Subcommittee would evaluate all facets of effective and secure recordkeeping, but they would especially focus on the key goal, reducing recordkeeping fees.

In February of 2021, the RFP was issued. After a thorough procurement process, independent third-party analysis, and additional due diligence, the Subcommittee made its unanimous recommendation to the Committee. The County is pleased to share the results of the formal process:

62% REDUCTION IN RECORDKEEPING FEES EQUATES TO APPROXIMATELY \$919,180 PER YEAR



Reduction will equate to approximately \$6.4 million over the contract term.

Additional Results:

- + RETENTION OF EXISTING ONSITE SERVICE MODEL
- + IMPROVED CAPITAL PRESERVATION FUND LIQUIDITY WITHIN THE RMT
- + REDUCED RMT FEES FOR CLAIMS ACTIVE AND NON-CLAIMS ACTIVE PARTICIPANTS

SUMMARY

For many Plans, the recordkeeper RFP process can have the greatest impact on participant retirement outcomes. The Committee was very aware of the importance of the RFP process. An RFP Evaluation Subcommittee ("Subcommittee") was formed, consisting of existing Committee members. This Subcommittee knew of the challenge to further improve the Plans, especially during a persistent pandemic. They were up to the task.

FEASIBILITY FOR OTHER PLAN SPONSORS

San Bernardino County encourages all agencies to check the marketplace at least every five to seven years to ensure your recordkeeping fees are competitive. Asset size does not matter. All agencies can benefit from evaluating your Plan costs relative to your peers. In fact, NAGDCA has several resources available including the NAGDCA Benchmarking Portal. In addition, the County encourages other Plan Sponsors to "sell" their Plan strength to the marketplace. Focus on healthy data and important features.

BY THE NUMBERS

For the County's RFP, the Subcommittee focused on key metrics and features such as:



The Subcommittee believes that incorporating healthy data and plan features into the RFP helped achieve such dramatic savings for Plan participants.

San Bernardino County humbly submits this nomination for your consideration. We hope other agencies may benefit from our RFP process and the excellent benefits that it afforded to County participants.

IN THEIR OWN WORDS

We were so pleased with the outcome of this RFP process. With so many other great benefits available to County participants, it is incumbent upon our Committee to ensure that these Defined Contribution Plans remain in the top tier in terms of service, technology, security, and low fees.

- Diane Rundles, Committee Chair, Human Resources Director

CONTACT PERSON

Alexander "Sandy" Meier, Employee Benefits Manager, Human Resources Department
✉ alexander.meier@hr.sbcounty.gov ☎ 909-387-9638
175 West Fifth Street, 1st Floor, San Bernardino, CA 92415

CONTRIBUTING STAFF

Diane Rundles, Director of Human Resources
Sandra Wakcher, Interim Division Chief, Dept. of Human Resources
Alexander "Sandy" Meier, Employee Benefits Manager, Dept. of Human Resources

INDUSTRY PARTNERS

Hyas Group, Voya Financial

NAGDCA GOV'T MEMBER

Yes

PARTICIPANT COMMUNICATION

The Evaluation Subcommittee, DCC, and staff worked with consultant Hyas Group, and ultimately Voya, to develop a communications strategy that effectively described the significant RFP enhancements to participants.

PARTICIPANT COMMUNICATION LETTER



Important News Regarding the San Bernardino County Defined Contribution Plans

The San Bernardino County Defined Contribution Committee recently conducted a thorough and competitive solicitation process to select a record keeper for the San Bernardino County Defined Contribution Plans and is pleased to announce that Voya FinancialSM has been retained as the exclusive record keeper and service provider for the County's Defined Contribution Plans which includes the 457, 401(a), PST and Retirement Medical Trust (RMT) Plans. This means that Plan participants will continue to have access to Voya's extensive participant services, including the local office and team of experienced representatives who will continue to provide plan and investment education, personalized enrollment assistance, as well as other retirement and financial planning services.

Minimizing expenses for Plan participants

Administrative Fees
Effective July 1, 2021, Voya's annual asset-based administrative fee was reduced from 0.095% to 0.036%. The Voya fee is pro-rated and deducted from your account balance monthly.

In addition to the Voya fee, there is a flat fee to help offset the County's plan-related expenses. It is deducted from participant accounts quarterly, pro-rata based on each account balance. This fee is deducted in the first month of each quarter for the prior quarter, e.g. the third quarter 2021 fee was assessed in October 2021. Fund management fees and other fund operating expenses will apply. Fees depend on the investment option chosen. Please refer to the individual Fund prospectus for fund fee information.

Retirement Medical Trust Fee
Effective July 1, 2021, the RMT Plan fees, in addition to the asset-based administrative fee reduction, were also reduced as follows:

- Non-Claims Active participants – from \$0.45 per month to \$0.40 per month
- Claims-Active participants – from \$3.00 per month to \$2.00 per month

Questions?
Your local Voya team is available and dedicated to you! The team of experienced representatives is available to answer questions and assist you with a variety of questions designed to help you review your specific situation and develop a plan that helps you meet your investment objectives.

Simply call (800) 452-5842 or (909) 748-4468 between Monday and Friday from 8 a.m. to 5 p.m. to ask a question or set up a one-on-one appointment.

Investment-related representations and registered representative of, and securities and investment advisory services offered through, Voya Financial Advisors, Inc. (member SIPC).

PARTICIPANT COMMUNICATION EMAIL

Emailed to participants with an email address on file.



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RECORDKEEPING CONTRACT WITH VOYA

REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS OF SAN BERNARDINO COUNTY AND RECORD OF ACTION

December 7, 2021

FROM: Diane Rundles, Director, Human Resources Department

SUBJECT: Agreement with Voya Retirement Insurance and Annuity Company, Voya Financial Partners, LLC, and Voya Institutional Trust Company for Recordkeeping Services of the Voluntary Retirement Plans and the Retirement Medical Trust Plan

RECOMMENDATIONS: Approve Contract between San Bernardino County and Voya Retirement Insurance and Annuity Company, Voya Financial Partners, LLC, and Voya Institutional Trust Company, as the provider for administration, investment, and recordkeeping services for the Voluntary Retirement Plans and the Retirement Medical Trust Plan, for the period of January 1, 2022, through December 31, 2026, with an option to extend one additional two-year term. (Presenter: Diane Rundles, Director, 387-5570)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES: Improve County Government Operations. Operate in a Fiscally Responsible and Business-Like Manner.

FINANCIAL IMPACT: Approval of this item will result in the use of Discretionary General Fund (Net County Cost). Costs associated with recordkeeping services provided by Voya Retirement Insurance and Annuity Company, Voya Financial Partners, LLC, and Voya Institutional Trust Company (collectively, Voya) are paid for by plan participants. The San Bernardino County Defined Contribution Plans Administrative Services Agreement (Exhibit 1) requires that Voya reimburse the County for the plan's reasonable and necessary administrative expenses.

BACKGROUND INFORMATION: Approval of this item authorizes a five-year agreement between the County and Voya making Voya the contracted service provider for administration, investment, and recordkeeping services for the County's 401(k) Defined Contribution, 401(a) Defined Contribution, 457(b) Deferred Compensation, Part-Time/Seasonal/Temporary (PST) Deferred Compensation and the Retirement Medical Trust (RMT) Plans (collectively, the Plans). Exhibit 1 encompasses all of the Plans and includes the language for the Voya recordkeeping fees and the County administrative fees.

After a formal procurement process, on May 19, 2021, the Defined Contribution (DC) Committee unanimously recommended that the Board of Supervisors (Board) agree to enter into a new five-year contract effective January 1, 2022, with an option to extend one additional two-year term.

The DC Committee in an advisory committee to the Plan Administrator (Human Resources Division Chief, Employee Benefits and Services Division) and the Board. The DC Committee meets regularly on a quarterly basis, or more frequently if required, to perform a variety of duties including, but not limited to: reviewing the Plans' investment performance and governance documents, receiving fiduciary trainings and discussing legislative updates. It consists of nine members from the County, associated agencies, and labor organizations including the Auditor/Controller/Treasurer/Tax Collector, San Bernardino County Employees' Retirement Association, County Administrative Office, Human Resources, Teamsters Local 1932, Sheriff's Employees

Individuals appointed by the County's Chief Executive Officer.

Committee established a Request for Proposal (RFP) Ad Hoc to begin the RFP process for Defined Contribution and RMT keeper/Provider Services with an effective date of January 1, 2021. In conjunction with the County's DC Consultant, Hyas Group, and for evaluating contract proposals from prospective bidders, the committee presented the proposed RFP and the DC Committee as of the RFP on February 23, 2021, the Human Resources 221-HR2-4129. The RFP was made available through the RFP.

Parent Location	New York, NY
Washington	Washington, DC
Columbus, OH	Columbus, OH
Greenwood Village, CO	Greenwood Village, CO

in the following criteria: quality and relevance of experience, quality and experience of personnel, and value of fee estimate posted by both the Subcommittee and Hyas, the Subcommittee is the service provider.

tee presented its findings and recommendation to the DC location of the enhancements secured through the RFP include a reduction in recordkeeping fees for participants in the fee for Claims Active participants (separated from the County Retirement Age) and Non-Claims Active participants (actively County and have not reached Normal Retirement Age), and the Standards to ensure the highest level of service for participants.

vide these fee reduction enhancements to plan participants in advance of the new contract. The early fee reduction was set on August 10, 2021 (Item No. 20). Overall, the lower fees savings to participants in the Plans of \$620,000.

I voted to approve the recommendation of the Subcommittee enter into a new five-year contract with Voya, effective January 1 one additional two-year term. The proposed contract will be or party with a thirty (30) day written notice of termination.

County Counsel (Jolena E. Grider, Deputy County Counsel, 1. Purchasing (Bruce Cole, Supervising Buyer, 387-2148) on sica Title, Administrative Analyst, 387-4222) on November 12, 2021; and County Finance and Administration (Robert J. Saldaña, Deputy Executive Officer, 387-4423) on November 17, 2021.

VOYA NEWS RELEASE

Voya extends its service relationship with the County of San Bernardino Defined Contribution Plans

Windsor, Conn., June 22, 2021 – Voya Financial, Inc. (NYSE:VOYA), announced today that it has been retained as the service provider for the County of San Bernardino's Defined Contribution Plans.

Voya's relationship with the County of San Bernardino began nearly 30 years ago and was extended pursuant to a five-year agreement, effective January 1, 2022. The plans consist of a 457(b) deferred compensation plan, 401(k) plan, 401(a) plan, Part-Time Seasonal/Temporary (PST) Plan, and Retirement Medical Trust plan. The combined plans represent approximately \$1.47 billion in assets under administration and represent nearly 32,000 participants.

"Given our long history with Voya we look forward to continuing our relationship with their team," said Diane Rundles, Director of Human Resources & Defined Contribution Committee Chair. "Voya's continued focus on providing our employees with personalized service solutions, impactful communication and educational campaigns, and best in class retirement planning digital tools will only continue to help advance the financial wellness needs of our customers across the County of San Bernardino."

As part of its commitment to providing a secure financial future for all Americans, Voya will continue to provide the County of San Bernardino employees with educational support and access to industry-leading tools and resources. These include Voya's myOrangeMoneySM participant website and retirement-income-estimating capabilities, advice and managed accounts, as well as communication and education programs designed to engage and motivate employees to save. County retirement plan participants also have access to a wide range of investment options, including a stable value offering from Voya's own asset manager, Voya Investment Management.

"We're thrilled that the County of San Bernardino has continued to place its trust in our business and our people," said Bill Harmon, chief client officer at Voya Financial. "Extending our relationship with their team is a true testament to the commitment Voya has in providing clients — including some of the largest retirement systems — with the resources and education to support the value they want for the long term."

The Hyas Group assisted the County of San Bernardino with the request for proposal process and ultimate retention of the plans with Voya. "The County's Plans are unique and complex to administer. The Evaluation Subcommittee was careful to include all of the critical elements of the Plans to ensure County participants continue to achieve optimal retirement results," added Rasch Cousneau, senior consultant at the Hyas Group.

Voya is uniquely positioned in the market to serve retirement plans of all sizes and across all sectors, including employers in the government and other tax-advantaged retirement plan markets. As an industry leader focused on the delivery of health, wealth and investment solutions to and through the workplace, Voya Financial is committed to delivering on its mission to make a secure financial future possible for all Americans — one person, one family, one institution at a time.

VOYA provides health, wealth and investment solutions that enable individuals, workplace and institutional clients to achieve their future. With a vision to be America's Retirement Company, VOYA's goal capabilities help create a better financial future for all. VOYA has \$7.6 billion in revenue in 2020 and \$729 billion in total assets as of March 31, 2021. Certified as a "Great Place to Work" state, VOYA is equally committed to conducting business in a way that is socially and ethically responsible. VOYA has been an ASIMM Company by Fortune magazine, one of the 2000 by the EthicalSource Institute, as a member of the Bloomberg "Best Place to Work for Disability Inclusion" on the Disability or more information, visit HYPERLINK "https://www.voya.com" HYPERLINK "https://www.voya.com" and Twitter HYPERLINK "https://twitter.com/voya" HYPERLINK "https://twitter.com/voya"

RFP PREPARATION



COUNTY OF SAN BERNARDINO
 Combined Retirement & RMT Plans
 Fiduciary Training
 Request for Proposal Preparation
 November 2020

KEY FEATURES

FEATURE	COUNTY SPECIFIC DETAILS
Service	Redlands office. Salaried local Voya office admin (+\$62,000)+ four salaried local Voya representatives (\$422,000). All dedicated to County. Total cost approximately 3.2 basis points.
Education	Custom award-winning education. Assigned Voya Participant Education Consultant. Custom video series, custom quarterly newsletter, custom mailers, emails, campaigns include "save more", "financial wellness", "restart", "near retirement", "auto-enrollment", "consolidate", "e-delivery".
Investments	Fund lineups updated April 2020. Weighted investment expenses are approximately 0.27% Stabilizer (457, 401a, 401k) – 4Q 2020 crediting rate 2.22%, M/B ratio 104.78% (09/30/2020) Voya Fixed Account (RMT) – crediting rate 1.50%

STATISTICS BY PLAN

	ASSETS	PARTICIPANTS	AVERAGE BALANCE
457 Plan	\$890,772,008	24,132	\$36,912
401(k) Plan	\$171,383,346	1,140	\$150,336
401(a) Plan	\$28,155,641	15,487	\$1,818
RMT	\$161,860,333	17,265	\$9,375
Full Time Plan Totals	\$1,252,171,328	24,132*	\$51,888
PST Plan	\$40,157,573	7,447	\$5,392

*Assumes all 401/RMT participants have 457 accounts

County of San Bernardino Retirement Plan Fee Benchmark Study - November 2020

Plan	Type	Assets	Partic	Avg. Asset	Avg. Asset	Record-keeping	Admin	Invest	Admin	Target	Stk-Inst	2020 Total Ret
1	457	\$1,048,350,610	26,261	\$39,521	\$39,521	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
2	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
3	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
4	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
5	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
6	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
7	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
8	457	\$649,202,393	30,346	\$38,388	\$38,388	0.42%	0.06%	0.54%	0.81%	12%	Yes	2.44%
9	401(a)	\$136,618,028	2,028	\$70,842	\$70,842	0.44%	0.07%	0.28%	0.42%	Yes	No	2.04%
10	457	\$422,939,659	3,328	\$127,091	\$127,091	0.26%	0.04%	0.26%	0.30%	30%	Yes	2.42%
Average		\$87,547,531*	4,782	\$187,090	\$187,090	0.39%	0.06%	0.31%	0.31%	30%	No	2.34%
Median		\$67,071,809*	3,782	\$109,231	\$109,231	0.24%	0.04%	0.24%	0.24%	30%	No	2.40%
457		\$649,202,393	22,688	\$37,237	\$37,237			0.68%	0.32%			2.68%
401(a)		\$162,335,273	1,196	\$145,462	\$145,462	0.27%	0.05%	0.04%	0.85%	60%	Yes	2.68%
401(a)		\$25,741,572	14,501	\$1,775	\$1,775			0.7%	0.3%		Yes	2.68%
RMT		\$161,860,333	17,265	\$9,375	\$9,375			0.4%	0.6%		No	2.68%
PST		\$40,157,573	7,447	\$5,392	\$5,392	0.34%	0.05%	0.04%	0.48%	30%	No	2.68%

*Client plan assets aggregated where applicable. Confidential - Not for Public Distribution

THE KEY PLAYERS

FIRM	NOTES
AIG	Mega multi-line insurance company trying to expand government plan presence. Strong technology spend in recent years.
Empower	Second largest Retirement provider in USA (behind Fidelity). Recently made number of acquisitions including Mass Mutual Retirement business.
ICMA-RC	Not-for-profit firm primarily focused on government plans. Large CA presence. County would be largest CA client. Recently announced shift of recordkeeping system to SS&C.
Lincoln	Similar to AIG, trying to expand into government plan space. CA experience mostly includes broker driven plans, water districts through ACWA sponsorships.
Mass Mutual	Recently sold to Empower. Likely will not receive a bid.
Nationwide	Strong CA presence. Riverside and San Diego County are clients, NACO sponsor. Top three in government space.
Prudential	Largest company on this list in terms of total revenues. Trying to expand government plan presence.
Voya	Incumbent. Recently became largest government plan provider with transition of WA State (from Empower).

GOALS: REQUEST FOR PROPOSAL

- Enhancing participant retirement outcomes;
- Analyzing the overall competitiveness of the Plans;
- Providing for the integrated administration and reporting for the Plans;
- Offering the most appropriate investment menu;
- Improving participant education and communication services;
- Providing robust online transaction and information capabilities;
- Providing support for as many administrative functions as deemed appropriate;
- Fee transparency and reducing participant and Plan expenses;
- Providing for an orderly and timely transition of assets and services if necessary; and
- Continuing the formal record keeper/Committee working relationship.

RFP PROJECT STAGES:



Project Initiation | **Initial Planning** | **RFP Data Gathering** | **Employee Meetings**

RFP Finalization & Release | **Collect & Analyze RFP Responses** | **Present Analysis to San Bernardino Committee** | **Provider Interviews**

Contract Negotiations | **Employee Meetings** | **Project Completion**

Recordkeeping RFP Proposed Timeline Current Contract Expiration Date: December 31, 2021

ITEM	COMPLETED	DATE	RESPONSIBLE PARTIES	ITEM	COMPLETED	DATE	RESPONSIBLE PARTIES
Comprehensive plan information and investment data request		10/23/2020	Hyas Group	Internal approval, if necessary, of vendor award recommendation		Week of April 20	County
Data request due back		10/30/2020	Vendor	Recommendation to Board and approval, if necessary		May Board Meeting	County
Water meetings to discuss goals and objectives, timelines and requirements		10/07/2020	County, Hyas Group	Hyas vendors on final selection (letter to award final)		June 2021	County, Hyas Group
RFP design process begins		10/07/2020	County, Hyas Group	Final vendor selection on County procurement site (if successful)		July 2021	County
Finalize scheduling and vendor distribution list with County		01/27/2021	County, Hyas Group	Contract negotiation begins		Aug. 2021	County, Hyas, Vendor
Hyas Group distributes RFP		02/02/2021	County, Hyas Group	Transition begins including kick-off meeting and weekly calls		Aug. 2021	County, Hyas, Vendor
Written questions from bidders due		02/12/2021	Bidders	Final draft of vendor contract due		Aug. 2021	County, Hyas, Vendor
Response to bidder questions due		02/19/2021	County, Hyas Group	Second draft of vendor contract due and submitted to legal		Sept. 2021	County, Hyas, Vendor
RFP questions due to Hyas Group		03/05/2021	Bidders	Confirm complete communications exchange		Sept. 2021	County, Hyas, Vendor
RFP questions due to Hyas Group		03/05/2021	Hyas Group	Final participant transition communication		Sept. 2021	County, Vendor
Clarification questions sent to vendors		03/13/2021	County, Hyas Group	Notice of withdrawal, participant meetings, rollover, email, etc.		Sept. 2021	County, Vendor
Initial report (and scoring if applicable) delivered to Committee		03/31/2021	Hyas Group	30-day notice/brochure mailed		Sept. 2021	County, Hyas Group
Meeting to discuss report and recommendations		04/05/2021	County, Hyas Group	Participant meetings and provider presentations begin		Oct. 2021	County, Hyas, Vendor
Finalist interview candidates selected		04/08/2021	County, Hyas Group	Second participant meetings and provider presentations		Nov. 2021	County, Hyas, Vendor
Interviews, formal, closing questions and scoring finalized		04/15/2021	County, Hyas Group	Transition of assets		Dec. 2021	County, Hyas, Vendor
Vendor interviews		Week of April 28	County, Hyas, Bidders	Transition evaluation		Jan. 2022	County, Hyas, Vendor