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**MAY 23, 2018**

**AGENDA ITEM 3  
INFORMATION ITEM**

**CALIFORNIA ABLE ACT BOARD**

***529A Program/Plan Manager Request for Proposals Update***

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***Information Item***

The California ABLE Act Board (“the Board”) will receive a verbal update from its Executive Director, Dante Allen, on the status of the Request of Proposals for Program/Plan Manager (“the RFP”) for the California ABLE Program (“CalABLE”).

***Background***

The Board has experienced two failed procurement efforts with regard to securing a program manager to administer CalABLE. Since the last effort, staff and the Board’s 529A program consultant have sought feedback from potential bidders to revise and make CalABLE’s RFP more viable.

Staff along with assistance from the Board’s legal counsel and 529A program consultant have revised the RFP based on feedback from potential bidders. Revisions include changing the RFP’s structure to fund the program manager’s startup and operational costs in the first year, streamlining extraneous questions, reducing the program manager’s marketing role, and adding some flexibility to the liability and indemnification provisions.

Staff intends to issue the RFP mid-May per the following tentative timeline:

<b>Date</b>	<b>Action</b>
May 21, 2018	RFP Available to Prospective Bidders
<b>May 28, 2018, 4pm PT</b>	<b>Deadline for Written Question Submissions</b>
June 1, 2018	Answers to Written Questions Distributed
<b>June 25, 2018, 4pm PT</b>	<b>Deadline for Proposal Submissions</b>
June 26 – July 8, 2018	Evaluation of Proposals
July 9, 2018	Notice of Intent to Award
July 17, 2018	Proposed Award Date
August 16, 2018	Commencement of Contract (pending Board and DGS approval)
Second Quarter Fiscal Year 2018/2019	Launch of CalABLE

***Attachments***

- Attachment #1 –Draft RFP No. ABLE 01-18