



Main Office
2555 Ponce de Leon Blvd., Suite 210, Coral Gables, FL 33134
Tel: (305) 646-7220 **Web:** www.elcmdm.org

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March 15, 2021

Re: Letter of Interest for 3(38) Fiduciary Services

Dear Vendor,

The Early Learning Coalition of Miami-Dade/Monroe, Inc. (the "Early Learning Coalition" or "Coalition") is a Florida non-profit corporation and IRC §501(c)(3) charitable organization dedicated to ensuring quality early care and education for children in Miami-Dade and Monroe counties. Through a variety of affordable and innovative early education and voluntary pre-kindergarten programs, the Early Learning Coalition serves more than 50,000 children aged from birth to 12 years old and their families.

The Early Learning Coalition is looking for vendors that can provide fiduciary and financial advisory services for our 401k plan administered by John Hancock, totaling approximately (i) 310 participants, and (ii) nine million dollars (\$9,000,000.00) in assets. Responding to this request for Letters of Interest does not create a contract with the Coalition, nor does it guarantee that a contract will be awarded by the Coalition. The Early Learning Coalition reserves the right to cancel this procurement at its sole discretion at any time and for any reason in the best interests of the Early Learning Coalition.

Please submit the following information, as well as any questions, to lsalerno@elcmdm.org by or before March 30, 2021:

- 1) Background of your company which, at a minimum, must include: (i) years of experience; (ii) list of credentials; (iii) confirmation that your company is authorized to work with John Hancock; (iv) years of experience working with John Hancock; and (v) description of work with John Hancock.
- 2) Description of the 3(38) services your firm provides.
- 3) Firm's compensation model.
- 4) Example of a quarterly report as well as the expected frequency of communication with the Early Learning Coalition.

As such, a Cone of Silence is in place. The Cone of Silence is defined as follows:

All parties to this solicitation shall be bound by a "Cone of Silence" surrounding solicitations and prohibitions against ex-parte communication. During the Cone of Silence, respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the seventy-two (72) hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays and state holidays, any of the following: (a) Coalition board members; (b) any Coalition staff; (c) any proposal evaluation committee members; and/or (d) any member of the executive or legislative branch regarding any aspect of this solicitation. Respondents directly contacting board members, staff, or proposal evaluation committee members risk disqualification of their response from consideration. Written communications are allowable at any time, but only if addressed to the designated contact person.

Thank you for your interest in working with the Early Learning Coalition of Miami-Dade/Monroe.

Sincerely,

Angelo Parrino
Chief Operating Officer