



RFP #:	<u>19-005V</u>	Tentative Board Meeting Date*:	<u>JUNE 12, 2018</u>
RFP Title:	<u>FINANCIAL ADVISORY SERVICES</u>	# Notified:	<u>436</u> # Downloaded: <u>9</u>
		# of Responses Rec'd:	<u>1</u> # of "No Bids": <u>1</u>
For:	<u>TREASURER'S OFFICE</u>	RFP Opening Date :	<u>APRIL 27, 2018</u>
	(School/Department)		
Fund:	<u>DEPARTMENT'S OPERATING BUDGET</u>	Advertised Date:	<u>APRIL 2, 2018</u>

POSTING OF Select One RECOMMENDATION/TABULATION: Select One Recommendations and Tabulations will be posted in the Procurement & Warehousing Services and www.Demandstar.com on **MAY 15, 2018 @ 3:00 pm** and will remain posted for 72 hours. Any person who is adversely affected by the decision or intended decision shall file a notice of protest, in writing, within 72 hours after the posting of the notice of decision or intended decision. The formal written protest shall be filed within ten (10) days after the date the notice of protest is filed. Failure to file a notice of protest or failure to file a formal written protest shall constitute a waiver of proceedings under this chapter. Section 120.57(3)(b), Florida Statutes, states that "The formal written protest shall state with particularity the facts and law upon which the protest is based." Saturdays, Sundays, state holidays and days during which the District is closed shall be excluded in the computation of the 72-hour time period provided. Filings shall be at the office of the Director of Procurement & Warehousing Services, 7720 West Oakland Park Boulevard, Suite 323, Sunrise, Florida 33351. Any person who files an action protesting an intended decision shall post with the School Board, at the time of filing the formal written protest, a bond, payable to The School Board of Broward County, Florida, (SBBC), in an amount equal to one percent (1%) of the estimated value of the contract. Failure to post the bond required by SBBC Policy 3320, Part VIII, Purchasing Policies, Section N, within the time allowed for filing a bond shall constitute a waiver of the right to protest.

(*) The Cone of Silence, as stated in the ITB / RFP / RFQ / HARD BID, is in effect until it is approved by SBBC. The Board meeting date stated above is tentative. Confirm with the Purchasing Agent of record for the actual date the Cone of Silence has concluded.

RECOMMENDATION TABULATION

ONE (1) PROPOSAL WAS RECEIVED FOR RFP 19-005V. THE PROPOSAL WAS EVALUATED BY THE FOLLOWING COMMITTEE CONSISTING OF:

- SHELLEY MELONI – DIRECTOR, PRE-CONSTRUCTION SERVICES, FACILITIES & CONSTRUCTION MANAGEMENT
- RAYMOND MONTELEONE – FINANCIAL ADVISORY MEMBER
- IVAN PERRONE – TREASURER, TREASURER'S OFFICE
- JOHN RUFFIN – FINANCIAL ADVISORY MEMBER
- OMAR SHIM – DIRECTOR, CAPITAL BUDGET

S/M/WBE ADVISOR: ANN MARIE RICHARDS, COORDINATOR, SUPPLIER DIVERSITY AND OUTREACH PROGRAM

BASED UPON SECTION 4.4 AND 5.1 OF THE RFP, THE EVALUATION COMMITTEE EVALUATED RESPONSES AND ASSIGNED POINTS TO ALL QUALIFIED RESPONDENTS. THE EVALUATION COMMITTEE HAS SELECTED THE FOLLOWING FIRMS

PFM FINANCIAL ADVISORS LLC

THIS AWARD SHALL BE CONTINGENT UPON COMPLETION OF A WRITTEN AGREEMENT.

CONTRACT PERIOD: JULY 1, 2018 THROUGH JUNE 30, 2023

By:		Date:	MAY 15, 2018
	_____		_____
	(Purchasing Agent)		

The School Board of Broward County, Florida, prohibits any policy or procedure which results in discrimination on the basis of age, color, disability, gender expression, national origin, marital status, race, religion, sex or sexual orientation. Individuals who wish to file a discrimination complaint, may call the Executive Director, Benefits & EEO Compliance at 754-321-2150 or Teletype Machine (TTY) at 754-321-2158.

Individuals with disabilities requesting accommodations under the Americans with Disabilities Act (ADA) may call the Equal Educational Opportunities (EEO) at 754-321-2150 or Teletype Machine (TTY) at 754-321-2158.

RFP 19-005V Financial Advisory Services	Maximum Points	Shelley Meloni	Raymond Monteleone	Ivan Perrone	Omar Shim	John Ruffin	Average Total
Experience & Qualification	35						
PFM Financial Advisors LLC		35	35	35	34	30	
Scope of Services	40						
PFM Financial Advisors LLC		40	40	40	38	35	
Cost of Services	15						
PFM Financial Advisors LLC		15	15	15	15	15	
S/M/WBE	10						
PFM Financial Advisors LLC		0	0	0	0	0	
	100	90	90	90	87	80	87.4