



RFP #:	<u>19-008V</u>	Tentative Board Meeting Date*:	<u>JUNE 12, 2018</u>
RFP Title:	<u>INVESTMENT BANKING SERVICES</u>	# Notified:	<u>151</u> # Downloaded: <u>23</u>
		# of Responses Rec'd:	<u>14</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>INCOME</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 18, 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

FOURTEEN (14) PROPOSALS WERE RECEIVED FOR RFP 19-008V. TWO (2) PROPOSALS DID NOT MEET THE MINIMUM REQUIREMENTS. THEREFORE, TWELVE (12) OF THE PROPOSALS WERE EVALUATED BY THE FOLLOWING COMMITTEE MEMBERS 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 5.4 AND 6.1 OF THE RFP, THE EVALUATION COMMITTEE EVALUATED RESPONSES AND ASSIGNED POINTS TO ALL QUALIFIED RESPONDENTS. THE EVALUATION COMMITTEE HAS SELECTED THE FOLLOWING FIRMS TO BE ROTATING SENIOR MANAGERS AND UNDERWRITING CO-MANAGERS.

SENIOR MANAGERS

- BANK OF AMERICA MERRILL LYNCH
- JP MORGAN SECURITIES, LLC
- MORGAN STANLEY & CO., LLC
- WELLS FARGO

UNDERWRITING CO-MANAGERS

- CITIGROUP GLOBAL MARKETS, INC.
- PNC CAPITAL MRKETS, LLC

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

CONTRACT PERIOD: AUGUST 1, 2018 THROUGH JULY 31, 2023

By:  Date: MAY 18, 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.



PROCUREMENT & WAREHOUSING SERVICES

Broward County Public Schools

RFP 19-008V Investment Banking Services

	Bank of America Merrill Lynch	Barclays Capital Inc	Blaylock Van, LLC	Citigroup Global Markets, Inc.	JP Morgan Securities LLC	Loop Capital Markets	Morgan Stanley & Col, LLC	PNC Capital Markets LLC	Raymond James	RBC Capital Markets	Stifel Nicolaus & Company, Inc.	Welles Fargo Securities
Maximum Points												
Experience and Qualifications	40											
Shelley Meloni	38	38	35	40	38	34	37	36	35	36	34	34
Raymond Monteleone	30	25	20	30	30	20	30	25	25	25	20	25
Ivan Perrone	34	31	28	30	35	33	35	32	32	32	31	33
John Ruffin	40	30	30	25	35	35	40	35	25	25	35	35
Omar Shim	39	34	21	37	37	22	28	32	29	20	15	35
Scope of Services	40											
Shelley Meloni	38	35	32	40	36	35	36	35	34	34	33	35
Raymond Monteleone	30	25	20	30	30	20	30	25	25	25	20	25
Ivan Perrone	34	30	28	30	34	29	35	30	32	31	31	33
John Ruffin	40	30	30	25	35	35	40	35	25	25	35	35
Omar Shim	37	30	18	35	37	22	27	29	32	20	18	31
Cost of Services	10											
Takedown	2.86	5	2.19	3.22	2.29	1.85	2.5	2.5	1.5	2.44	2.5	3.23
Expenses	2.39	1.24	1.25	4.25	2.92	1.11	2.31	3.1	4.84	1.94	1.36	5
Total	5.25	6.24	3.44	7.47	5.21	2.96	4.81	5.6	6.34	4.38	3.86	8.23
Supplier Diversity	10											
	10	10	0	10	10	0	10	10	10	10	10	10
Total	100	87.25	77.84	55.84	81.87	59.96	82.41	78.4	75.14	68.98	68.26	82.43