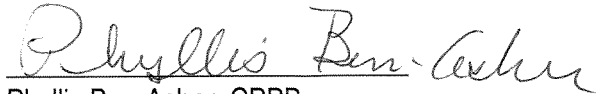


RFP 23-041N
ADDITIONAL RECOMMENDATION 2 OF 2
BOARD MEETING: JUNE 6, 2006

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

ADDITIONAL RECOMMENDATION
RFP 23-041N
FINANCIAL ADVISORY SERVICES

It is recommended that the contract with Public Financial Management, Inc. and Fidelity Financial Services, L.C. to serve as Co-Financial Advisors be renewed for an additional year from September 3, 2006 through September 2, 2007, in accordance with General Condition 5.3 of the RFP, authorizing contract renewal. This recommendation is not a request for an additional expenditure. This recommendation will allow the Treasurer's Office to continue purchasing financial advisory services as required through September 2, 2007.



Phyllis Ben-Asher, CPPB
Purchasing Agent III

Note: Fees will be paid from proceeds of financings completed. There is no financial impact to the District.


Attachments:
Additional Recommendation 1 of 1
Original Recommendations/Tabulations

RFP 23-041N
ADDITIONAL RECOMMENDATION 1 OF 1
BOARD MEETING: MAY 3, 2005

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

ADDITIONAL RECOMMENDATION
RFP 23-041N
FINANCIAL ADVISORY SERVICES

It is recommended that the contract with Public Financial Management, Inc. and Fidelity Financial Services, L.C. to serve as Co-Financial Advisors be renewed for an additional year from September 3, 2005 through September 2, 2006, in accordance with General Condition 5.3 of the RFP. This recommendation is not a request for an additional expenditure. This recommendation will allow the Treasurer's Office to continue purchasing financial advisory services as required through September 2, 2006.



Phyllis Ben-Asher, CPPB
Purchasing Agent III

Note: Fees will be paid from proceeds of financings completed. There is no financial impact to the District.

Attachments:
Original Recommendations/Tabulations

The School Board of Broward County, Florida
Purchasing Department

RFP No.: <u>23-041N</u>	Board Meeting <u>JULY 30, 2002</u>
Description: <u>FINANCIAL ADVISORY SERVICES</u>	RFPs Sent: <u>25</u> Proposals Rec'd: <u>1</u> No Response: <u>4</u>
<u>TERM CONTRACT</u>	Proposal Opening: <u>JUNE 24, 2002</u>
For: <u>TREASURER'S OFFICE</u>	Advertised Date: <u>JUNE 4, 2002</u>
(School/Department)	
Fund: <u>DEPARTMENT'S OPERATING BUDGET</u>	Award Amount: _____

POSTING OF PROPOSAL RECOMMENDATION/TABULATION:

Purchasing Department on JULY 26, 2002 @ 3:00 P.M. RFP Recommendations and Tabulations will be posted in the _____, and will remain posted for 72 hours. Any person desiring to protest the Proposal Recommendation/Tabulation shall file, in writing, a notice of protest within 72 hours after the time posted as stated herein, and shall file a formal written protest within ten days after filing the notice of protest. Saturdays, Sundays, legal holidays and days during which the school district administration is closed shall be excluded in the computation of the 72-hour time period. Filings shall be at the office of the Director of Purchasing, 7720 West Oakland Park Boulevard, Suite 323, Sunrise, Florida 33351. 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."

ONE PROPOSAL WAS RECEIVED IN RESPONSE TO RFP 23-041N. PROPOSAL WAS EVALUATED BY THE DISTRICT'S FINANCIAL ADVISORY COMMITTEE CONSISTING OF:

DR. ROBERT PARKS, CHAIRPERSON, BOARD MEMBER
BEVERLY A. GALLAGHER, BOARD MEMBER
I. BEN LEONG, COMPTROLLER
FRED MILLSAPS, CHAIRMAN, DISTRICT'S FINANCIAL ADVISORY COMMITTEE
RONALD ABRAHAM, DISTRICT'S FINANCIAL ADVISORY COMMITTEE
HAROLD HIPPLER, DISTRICT'S FINANCIAL ADVISORY COMMITTEE

M/WBE ADVISOR: ZAIDA RIOLLANO

BASED UPON SECTION 2.4 OF THE RFP, THE FOLLOWING SHORT LIST OF FINALISTS WILL BE SUBMITTED TO THE SCHOOL BOARD FOR INTERVIEW AND FINAL SELECTION:

PUBLIC FINANCIAL MANAGEMENT AND FIDELITY FINANCIAL SERVICES, LLC

CONTRACT TERM FOR BOARD SELECTED FIRM SHALL BE JULY 30, 2002 THROUGH JULY 29, 2005.

FOR FURTHER INFORMATION ABOUT THIS RFP, SEE PAGE 13 OF 19 PAGES OF THE RFP.

By: _____

(Buyer/Purchasing Agent)

Date: _____

7/25/02