

The School Board of Broward County, Florida
Supply Management & Logistics Department

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|--------------|---|------------------|-----------------------|-------------|-----------|
| RFP No.: | <u>14-008V</u> | Board Meeting: | <u>JULY 23, 2013</u> | | |
| Description: | <u>FINANCIAL ADVISORY CONSULTANT SERVICES</u> | Notified: | <u>215</u> | Downloaded: | <u>20</u> |
| | <u>TERM CONTRACT</u> | RFP Rec'd: | <u>2</u> | No Bids: | <u>0</u> |
| For: | <u>TREASURER'S OFFICE</u> | RFP Opening: | <u>APRIL 16, 2013</u> | | |
| | (School/Department) | | | | |
| Fund: | <u>(**)</u> | Advertised Date: | <u>MARCH 19, 2013</u> | | |

POSTING OF RFP RECOMMENDATION/TABULATION: RFP Recommendations and Tabulations will be posted in the Supply Management & Logistics Department and www.Demandstar.com on MAY 10, 2013 @ 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 school district administration 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 Supply Management & Logistics Department, 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.

RECOMMENDATION/TABULATION

TWO PROPOSALS WERE RECEIVED IN RESPONSE TO THIS RFP 14-008V. PROPOSALS WERE EVALUATED BY THE FOLLOWING COMMITTEE CONSISTING OF:

I. BENJAMIN LEONG – CHIEF FINANCIAL OFFICER, OFFICE OF THE CHIEF FINANCIAL OFFICER
HENRY ROBINSON – TREASURER, TREASURER'S OFFICE
OMAR SHIM – DIRECTOR, CAPITAL BUDGET
SHELLY MELONI – CHIEF FACILITIES & CONSTRUCTION OFFICER – TASK ASSIGNED, OFFICE OF THE FACILITIES & CONSTRUCTION DEPARTMENT

M/WBE ADVISOR: MARCY HOUSER, M/WBE SPECIALIST III

BASED UPON SECTION 5.0 OF THE RFP, THE COMMITTEE INTERVIEWED AND RECEIVED PRESENTATIONS, EVALUATED PROPOSALS AND ASSIGNED POINTS TO ALL QUALIFIED PROPOSERS, THE COMMITTEE THEN ENTERED INTO NEGOTIATIONS WITH SELECTED PROPOSER. THE COMMITTEE SELECTED THE FOLLOWING FIRM AS THE TOP RANKED PROPOSER AND RECOMMENDATION FOR AWARD:


PUBLIC FINANCIAL MANAGEMENT, INC. (PRIMARY)
*FIDELITY FINANCIAL SERVICES, L.C. (CO-CONSULTANT)
(MBE: AFRICAN-AMERICAN, FORT LAUDERDALE, FL)

*M/WBE VENDOR

**NOTE: FEES WILL BE PAID FROM PROCEEDS OF FINANCINGS COMPLETED. THERE IS NO FINANCIAL IMPACT TO THE DISTRICT.

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

CONTRACT PERIOD: JULY 23, 2013 THROUGH JUNE 30, 2016

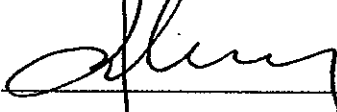
By:  Date: 05/09/13
(Purchasing Agent)

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.

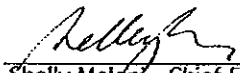
RFP 14-008V
FINANCIAL ADVISORY CONSULTANT SERVICES

| Financial Advisory Consultant Services - 14-008V | Maximum Points | Ben Leong | Henry Robinson | Omar Shim | Shelly Meloni | Average Points |
|--|----------------|-----------|----------------|-----------|---------------|----------------|
| Experience and Qualifications | 30 | | | | | |
| FirstSouthwest Company | | 25 | 25 | 26 | 25 | 25 |
| Public Financial Management, Inc. Fidelity Financial Services, Inc. | | 30 | 30 | 30 | 30 | 30 |
| Scope of Services | 35 | | | | | |
| FirstSouthwest Company | | 30 | 30 | 26 | 35 | 30 |
| Public Financial Management, Inc. Fidelity Financial Services, Inc. | | 34 | 35 | 34 | 35 | 35 |
| Cost of Services | 30 | | | | | |
| FirstSouthwest Company | | 27 | 27 | 27 | 27 | 27 |
| Public Financial Management, Inc. Fidelity Financial Services, Inc. | | 20 | 20 | 20 | 20 | 20 |
| MWBE Participation | 5 | | | | | |
| FirstSouthwest Company | | 2 | 2 | 2 | 2 | 2 |
| Public Financial Management, Inc. Fidelity Financial Services, Inc. | | 5 | 5 | 5 | 5 | 5 |
| Total Score | 100 | | | | | |
| FirstSouthwest Company | | | | | | 85 |
| Public Financial Management, Inc. Fidelity Financial Services, Inc. | | | | | | 90 |


 I. Benjamin Leong - Chief Financial Officer,
 Office of the Chief Financial Officer


 Omar Shim, Director - Capital Budget


 Henry Robinson - Treasurer, Treasurer's Office


 Shelly Meloni - Chief Facilities & Construction Officer -
 Task Assigned, Office of the Facilities & Construction
 Officer