

**RFP-4413-14-RD**

**FINANCIAL ADVISORY SERVICES**

**EVALUATION MATRIX**

**2:00 P.M., MAY 14, 2014**

<b>PROPOSERS:</b>	<b>Dunlap &amp; Associates</b>	<b>First Southwest Company</b>	<b>Public Financial Management, Inc. (The PFM Group)</b>
<b>EVALUATION COMMITTEE MEMBERS:</b>			
<b>MATTHEW LALLA</b>	<b>86</b>	<b>96</b>	<b>93</b>
<b>MIRTHA DZIEDZIC</b>	<b>86</b>	<b>95</b>	<b>91</b>
<b>LORIE MERTENS- BLACK</b>	<b>85</b>	<b>98</b>	<b>84</b>
<b>TOTAL SCORES:</b>	<b>257</b>	<b>289</b>	<b>268</b>
<b>RANKINGS:</b>	<b>3</b>	<b>1</b>	<b>2</b>



# CITY OF HOLLYWOOD, FLORIDA

## PROCUREMENT SERVICES DIVISION

### Solicitation Request Form (Use for bids, RFPs, RLIs, RFQs)

Date 2/24/14

Department/Office Financial Services

Division/Area N/A

Contact Person Matthew Lalla

Title Financial Services Director

Phone x3231

Email mlalla@hollywoodfl.org

1. Product/Service being requested (be specific.) Financial Advisory services for debt transactions

2. Detailed description of the products/services function and purpose. Professional financial advisory services for debt transactions including: development of financing plans for capital projects, coordination of presentations to bond rating agencies, advising the City during bond pricings, assisting in the preparation of financing documents, and preparation of cash flow schedules.

Are there alternative products/services capable of performing the required function? No

3. Has this product/service previously been formally solicited by the City of Hollywood?

☒ Yes ☐ No ☐ Unsure

If yes, please provide previous solicitation number. RFP #3600-JLW

4. Has this product/service previously been formally solicited by another government agency?

☒ Yes ☐ No ☐ Unsure

If yes, please provide details and copy if available. \_\_\_\_\_

5. Total estimated cost of the requested product/service? \$100,000 over contract term

Has this cost been approved in your budget? ☒ Yes ☐ No

#### Procurement Service Division use only

Requisition # R \_\_\_\_\_  
BPO \_\_\_\_\_  
(As Applicable)

Purchase Order # P \_\_\_\_\_  
(As Applicable)

Blanket Purchase Order # \_\_\_\_\_  
(As Applicable)

If yes, provide Account Number (s.) TBD \_\_\_\_\_

6. Formal Solicitations must be advertised for a minimum of 10 (ten) days and typically not more than 30 (thirty) days. How long is the Department/Office requesting to advertise this solicitation? 20 Days

7. Is a pre-bid meeting required? ☐ Yes ☒ No

If yes, are you requesting it to be mandatory? ☐ Yes ☒ No

8. Project location? City Hall

9. Completion Time: Final completion of this project shall be in N/A calendar days once a Notice To Proceed (NTP) is given to the awarded vendor.

10. Are you requesting this formal solicitation require liquidated damages (liquidated damages are not penalties, they should represent the amount of monies the City will incur/lose if the project is not completed in require time?)

☐ Yes ☒ No

11. Please list any special licenses or certification require to bid. Must be registered with the Municipal Securities Rulemaking Board as a Municipal Advisor.

12. Are there any outside entities assisting with this solicitation (i.e. Architect, Consultant, etc?)  
☐ Yes ☒ No

If yes, please provide the information:

Entity \_\_\_\_\_ Contact Person \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

13. Are there attachments associated with this request? ☒ Yes ☐ No

14. Would this purchase(s) result in the potential of future purchases for related products/services being restricted to a particular vendor or create a specific vendor as sole source provider for related items?

☐ Yes ☒ No

If yes, please describe the related products/services and estimated cost(s.)

\_\_\_\_\_

15. Would this purchase(s) result in any future maintenance costs which are not included in the initial purchase?

☐ Yes ☒ No

If yes, please attach a draft maintenance plan which includes cost estimates and funding source(s.)

\_\_\_\_\_

16. Is this a grant related purchase? ☐ Yes ☒ No

Procurement Service Division use only

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BPO \_\_\_\_\_  
(As Applicable)

Purchase Order # P \_\_\_\_\_  
(As Applicable)

Blanket Purchase Order # \_\_\_\_\_  
(As Applicable)

If yes, please provide details (timeline, expiration dates, milestones, special procurement requirements, etc.) \_\_\_\_\_

Will this require matching funds? ☐ Yes ☒ No

What is the grant source? \_\_\_\_\_

What is the grant (dollar) amount? \_\_\_\_\_

17. Does this solicitation for product/service work in conjunction with any other Department/Office or will it impact any other Department/Office? ☒ Yes ☐ No

If yes, please provide details on Department/Office and how Bond issue will involve Public Utilities Department and City Attorney's Office

Signature(s) below of other Department/Office Director(s) indicates they have reviewed and agree to this Request Form.

Matthew Lalla  
Signature

Financial Services Dept  
Department/Office

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Department/Office

18. Please provide the names of suggested evaluations committee member:  
(NOTE: Committee members should not be direct reports.)

Mirtha Dziedzic

Lorie Mertens-Black

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

19. Please provide any specific vendor(s) to be included in the notification of these solicitations.

\_\_\_\_\_

To be completed by Procurement Services Division upon award recommendation

Advanced search of the vendor recommended for award on the Federal Government's Systems for Award Management at [www.sam.gov](http://www.sam.gov).

Date of Advanced Search \_\_\_\_\_

Company Name(s) Searched

Search Results

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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BPO \_\_\_\_\_  
(As Applicable)

Purchase Order # P \_\_\_\_\_  
(As Applicable)

Blanket Purchase Order # \_\_\_\_\_  
(As Applicable)

Matthew Lalla  
Contact Person's Signature

2/24/14  
Date

Supervisor's Signature  
Matthew Lalla  
Director's Signature

Date  
2/24/14  
Date

APPROVAL (Procurement Service Division Use Only)			
Verified By:	<u>Russ ID 124</u>	Date	<u>3/24/14</u>
Approved By:	<u>Joe L</u>	Date	<u>3-26-14</u>

Procurement Service Division use only

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