



## Purchasing Division

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### \*\* NOTIFICATION OF RANKING \*\*

Date: **September 16, 2014**  
Solicitation No. & Title: **140442 – Financial Advisor Services**  
Buyer: **Mike Thornton, Purchasing Manager**

The City of Leesburg Evaluation Committee for the noted Request for Proposal (RFP) has come to a consensus on the final ranking of firms responding to RFP 140442. The final ranking is as follows:

<b>Ranking</b>	<b>Firm Name</b>
1	The PFM Group – Orlando, FL
2	Dunlap & Associates, Inc. – Winter Park, FL
3	FirstSouthwest – Orlando, FL
4	Larson Consulting Services, LLC – Orlando, FL
5	Public Resources Advisory Group – St. Petersburg, FL

An evaluation committee has completed their evaluation of the submissions in accordance with the evaluation elements (criteria) detailed in Section 4 of the RFP. The results of those evaluations are attached.

For each response evaluated, numerical scores assigned by each evaluator were converted to a ranking. The rankings for each firm were totaled and then converted to an overall ordinal score. Each firm was then assigned an overall ranking based on the ordinal score. Using this method has proven to minimize the effects of large variances in any one evaluator's scoring or differences in scoring tendencies from evaluator to evaluator.

The committee has determined interviews with the top two firms will be held to assist in determining the top ranked firm to begin negotiating a contract for services.

A detailed tabulation of all scoring to support the attached summary of rankings is available at our FTP site using the following URL. The bid responses for each firm are also available for viewing.

<ftp://ftp.leesburgflorida.gov/Bids-Purchasing/140442%20-%20Financial%20Advisor%20Services/>

Should you have any questions regarding this notice please contact me at (352)728-9880. The City appreciates the time and effort of all parties responding to this solicitation.

Respectfully,

A handwritten signature in black ink that reads "Mike Thornton".

Mike Thornton  
Purchasing Manager

attachment

**Summary of Rankings**  
**RFP 140442 - Financial Advisor Services**

Firm Name	OVERALL TOTALS			Evaluator 1		Evaluator 2		Evaluator 3		Evaluator 4	
	Rank	Total Ord.	Points	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Dunlap & Associates, Inc.	2	7	1862.5	530	1	544.5	2	390	3	398	1
First Southwest	3	13	1706.0	445	4	531	3	395	2	335	4
Larson Consulting Services, LLC	4	16	1635.0	445	4	465	5	380	4	345	3
The PFM Group	1	6	1932.5	520	2	560	1	485	1	367.5	2
Public Resources Advisory Group	5	17	1505.0	460	3	487.5	4	310	5	247.5	5

**DETAILED EVALUATOR SCORING**  
**RFP 140442 - Financial Advisor Services**

	Weight	Eval. 1		Eval. 2		Eval. 3		Eval. 4	
		Score	Points	Score	Points	Score	Points	Score	Points
<b>DUNLAP &amp; ASSOCIATES, INC.</b>		<b>530</b>		<b>544.5</b>		<b>390</b>		<b>398</b>	
Experience and Qualifications of Firm	35	4.00	140	4.50	157.5	3.00	105	3.50	122.5
Experience and Qualifications of Team Members to be Assigned to City	25	4.00	100	4.40	110	3.00	75	3.50	87.5
Experience with municipalities similar to the City of Leesburg including the types of utilites operated by the City	20	5.00	100	4.70	94	3.00	60	2.40	48
Cost of Services	30	5.00	150	4.60	138	4.00	120	3.50	105
Overall Impression of Firm and Proposal	10	4.00	40	4.50	45	3.00	30	3.50	35
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0
<b>FIRST SOUTHWEST</b>		<b>445</b>		<b>531</b>		<b>395</b>		<b>335</b>	
Experience and Qualifications of Firm	35	4.50	157.5	4.40	154	4.00	140	2.50	87.5
Experience and Qualifications of Team Members to be Assigned to City	25	4.00	100	4.40	110	3.00	75	3.5	87.5
Experience with municipalities similar to the City of Leesburg including the types of utilites operated by the City	20	3.00	60	4.40	88	3.00	60	3.50	70
Cost of Services	30	3.00	90	4.50	135	3.00	90	2	60
Overall Impression of Firm and Proposal	10	3.75	37.5	4.40	44	3.00	30	3.00	30
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0
<b>LARSON CONSULTING SERVICES, LLC</b>		<b>445</b>		<b>465</b>		<b>380</b>		<b>345</b>	
Experience and Qualifications of Firm	35	3.50	122.5	4.20	147	3.00	105	2.50	87.5
Experience and Qualifications of Team Members to be Assigned to City	25	4.50	112.5	4.20	105	3.00	75	3.00	75
Experience with municipalities similar to the City of Leesburg including the types of utilites operated by the City	20	3.50	70	3.90	78	4.00	80	3.00	60
Cost of Services	30	3.50	105	3.20	96	3.00	90	3.25	97.5
Overall Impression of Firm and Proposal	10	3.50	35	3.90	39	3.00	30	2.50	25
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0
<b>THE PFM GROUP</b>		<b>520</b>		<b>560</b>		<b>485</b>		<b>367.5</b>	
Experience and Qualifications of Firm	35	5.00	175	4.80	168	5.00	175	3.50	122.5
Experience and Qualifications of Team Members to be Assigned to City	25	4.00	100	4.80	120	4.00	100	3.00	75
Experience with municipalities similar to the City of Leesburg including the types of utilites operated by the City	20	4.00	80	4.90	98	4.00	80	3.00	60
Cost of Services	30	4.00	120	4.20	126	3.00	90	3.00	90
Overall Impression of Firm and Proposal	10	4.50	45	4.80	48	4.00	40	2.00	20
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0
<b>PUBLIC RESOURCES ADVISORY GROUP</b>		<b>460</b>		<b>487.5</b>		<b>310</b>		<b>247.5</b>	
Experience and Qualifications of Firm	35	5.00	175	4.00	140	3.00	105	2.50	87.5
Experience and Qualifications of Team Members to be Assigned to City	25	4.00	100	4.30	107.5	3.00	75	3.00	75
Experience with municipalities similar to the City of Leesburg including the types of utilites operated by the City	20	3.00	60	3.80	76	2.00	40	2.00	40
Cost of Services	30	3.00	90	4.10	123	2.00	60	1.00	30
Overall Impression of Firm and Proposal	10	3.50	35	4.10	41	3.00	30	1.50	15
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0