

**EVALUATION COMMITTEE
CONSENSUS MEMORANDUM No. 2**



To:	Mike Thornton, Purchasing Manager
From:	Bill Spinelli, Finance Director - Evaluation Panel Chairman
Date:	September 29, 2014
Subject:	FINAL RANKING OF FIRMS RFP 140442 – Financial Advisor Services

The intention of this solicitation is to establish an agreement with the top ranked firm to provide Financial Advisor Services to the City.

Following the interviews with the two top ranked firms committee members were provided the opportunity to complete their scoring. With scoring completed, the committee has come to a consensus as to the final ranking reflected here.

<u>Ranking</u>	<u>Firm Name</u>
1	The PFM Group – Orlando, FL
2	Dunlap & Associates, Inc. – Winter Park, FL

The committee directs the Purchasing Manager to begin contract negotiations with the top ranked firm, The PFM Group.

Respectfully,

Bill Spinelli, CPA Finance Director

Final 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
The PFM Group	1	4	1957.5	535	1	560	1	485	1	377.5	1
Dunlap & Associates, Inc.	2	8	1842.5	530	2	544.5	2	410	2	358	2

SHORTLIST - EVALUATOR SCORING
RFP 140442 - Financial Advisor Services

	Weight	Eval. 1		Eval. 2		Eval. 3		Eval. 4	
		Score	Points	Score	Points	Score	Points	Score	Points
DUNLAP & ASSOCIATES, INC.		530		544.5		410		358	
Experience and Qualifications of Firm	35	4.00	140	4.50	157.5	3.00	105	3.00	105
Experience and Qualifications of Team Members to be Assigned to City	25	4.00	100	4.40	110	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	5.00	100	4.70	94	4.00	80	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	2.50	25
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0
THE PFM GROUP		535		560		485		377.5	
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	4.50	135	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	3.00	30
Local Vendor Preference (10, 4 or 0 points)			0		0		0		0