

City of Delray Beach  
Final Ranking Form

Financial Advisor Services  
RFP No. 2017-025

Eval Criteria 1	Henry	McAden	Sugarman	Score	Experience 40 Points	
					Strengths	Weaknesses
FirstSouthwest					The account manager that will be assigned to the City has 23 years experience. Firm presented a range of cities that had similar issues that effect DB.	Firm did not present much on CIP approach. Background in designing, implementing and monitoring of financing element of the capital improvements plan not presented. The percentage of time allocated to the City not indicated in submittal. Experience related to debt not presented by firm.
	39.0	32.0	38.0	36.3		
PFM					Firm has a lot of experience with several taxing districts.	The firm did not indicate workload and current percentage of time allocated to the City. Firm shared few details on borrowing or bank lending. Firm did not provide information on how they would approach debt ration study, alternatives nor innovative financing options.
	38.0	37.0	37.0	37.3		
RBC						Firm did not provide any awards, certifications, or other related recognition. Very little indicated for a CIP program in proposal. Firm did not share the current workload as requested in the proposal. The proposal seemed like it was a cut and paste document, not specific to DB and very generic.
	36.0	29.0	34.0	33.0		

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Eval Criteria 2	Henry	McAden	Sugarman	Score	Capacity & Approach 30 Points	
					Strengths	Weaknesses
FirstSouthwest					Case studies presented gave great detail of what has been done in the past. The firm rated the complexity of the City financing in the proposal. The firm clearly presented information requested in the proposal regarding infrastructure and the current sale tax. Firm presented a seven phase plan to meet the requirements of the scope of services.	Firm did not share the outline of three innovative financing techniques. Firm did not give a clear intention of what is desired of City staff regarding services. Implementation plan not included in proposal. Narrative on goals firm would like to achieve was not presented in proposal.
	29.0	18.0	18.0	21.7		
PFM					The proposal gave details of the Cities current rating and ways to improve the rating. The firm offered an added approach to identify existing revenue stream. The firm shared example of another municipality similar in size with no property tax and how the use of innovative financing techniques created success. Firm desires to be a long term strategic partner of the City.	Firm use of staff time not clear in proposal. Firms strategy seems to rely on the 0.01 sales tax. The information proposed was short and always went back to information that was previously shared.
	28.0	29.0	25.8	27.6		
RBC					Firm presented tax values for the City. Firm considers green bonds an innovative financing technique.	The proposal did not share various financing options. Firm did not present implementation plan as requested. Proposal lacked research on the City, information presented is generic. Firm did not give estimate of time required by City staff. Proposal did not share goals the firm wanted to achieve.
	26.0	20.0	17.8	21.3		

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Eval Criteria 3	Henry	McAden	Sugarman	Score	Fee Proposal 15 Points	
					Strengths	Weaknesses
FirstSouthwest					Lowest bond transaction fees	
	14.4	14.4	14.4	14.4		
	14.4	14.4	14.0	14.3		
PFM						
	11.4	11.4	13.2	12.0		
	11.4	11.4	13.0	11.9		
RBC						Highest hourly fees for 'Other Services'
	13.2	13.2	13.2	13.2		
	13.2	13.2	15.0	13.8		
Eval Criteria 4	0.0	0	0	Score	Interviews (If Conducted) 10 Points	
					Strengths	Weaknesses
FirstSouthwest				0.0	Interviews were not conducted	
PFM				0.0	Interviews were not conducted	
RBC				0.0	Interviews were not conducted	
Eval Criteria 5	0.0	0	0	Score	Location (Certified Local Business) 5 Points	
					Strengths	Weaknesses
FirstSouthwest				0.0		Does Not Qualify
PFM				0.0		Does Not Qualify
RBC				0.0		Does Not Qualify

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Ranking		Final Ranking Total
FirstSouthwest		72.3
PFM		76.9
RBC		68.1

14-Mar-17

Buyer Name: Ja'Anal Dowdell

Signature: \_\_\_\_\_