RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: First Southwest & Division of Hilltop Securities

VE	NDOR NAME: TIST SOUNCE A DIVISION OF THE OF		
	<u>Criteria</u>	<u>Point</u> Range	Score
1	Experience and Expertise of firm Knowledge and experience in structuring and analyzing complex	0-20	_18
	debt issues, experience in providing services to municipal issuers.		
2	Qualifications of Individuals assigned to the City Including their experience and understanding of the needs of the City.	0-30	27
3	Resources and Methodology General financing approach, strategies for bond issuance.	0-20	2 ED
4	References Client references for which similar services have been performed.	0-10	to grand
5	Cost The firm providing the lowest price to the City will receive the maximum of 20 points Points will be awarded to other proposers in the following manner: 20 – [20 points X (total cost – lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 20 points Proposal 2 would achieve a score of 14 points, calculated as follows: 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points Including the overall project-task budget and any itemized cost breakdowns.	0-20	20 9/29/2019
List	Total the reasons for this evaluation (justify the rating/scoring):	0-100	93
	not es detailed Proposal in certain erreas, A. underwriting services. Mot reng knowleable Office kny good references.	Hy C	ble liggster
	hormont 8/30/2017 Eneto Diame	hut	

Signature of Evaluator

Date

Printed Name

RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial Advisors LLC

1	Experience and Expertise of firm	Criteria	complex		Point Range 0-20	Score 20
	Knowledge and experience in structur debt issues, experience in providing se					
2	Qualifications of Individuals assign Including their experience and underst	ned to the City		ty.	0-30	30
3	Resources and Methodology General financing approach, strategies	s for bond issuan	ce.		0-20	20
4	References Client references for which similar services	vices have been p	performed.		0-10	10
5	5 Cost The firm providing the lowest price to the City will receive the maximum of 20 points Points will be awarded to other proposers in the following manner:					10_
	20 – [20 points X (total cost – lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 20 points Proposal 2 would achieve a score of 14 points, calculated as follows: 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points Including the overall project-task budget and any itemized cost breakdowns.					
List	Total the reasons for this evaluation (justify t	the rating/scoring)):		0-100	90
Very experienced with debt issues and understand the need of the city. Detailed proposal. Very good references Provious experience with the lite and understand the city charter						
	Spuant 81:	30/2017	Enje	to Diame	auti	
Sigr	nature of Evaluator	Date	/	Printed Name		

RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: First Southwest

					<u>Point</u>		
	<u>C</u>	<u>riteria</u>			Range	Score	
1	Experience and Expertise of firm Knowledge and experience in structuri	ng and analyzin	g complex		0-20	15	
	debt issues, experience in providing se	ervices to munic	ipal issuers.			- 0	
2	Qualifications of Individuals assign Including their experience and underst		eeds of the Cit	y.	0-30	2/	
3	Resources and Methodology General financing approach, strategies	s for bond issua	nce.		0-20	20	
4	References				0-10	8	
	Client references for which similar serv	rices have been	performed.				
5	Cost			um of 20	0-20	20	
	The firm providing the lowest price to the points	ne City will rece	ive the maxim	ulli oi 20			
	Points will be awarded to other propose						
	20 – [20 points X (total cost – lowest to Note: If the result is a negative number						
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000						
	Proposal 1 being the lowest, would achieve a score of 20 points						
Proposal 2 would achieve a score of 14 points, calculated as follows: 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points							
Including the overall project-task budget and any itemized cost breakdowns.							
	Takal				0-100	90	
List	Total the reasons for this evaluation (justify the transfer of the transfer	he rating/scoring	g):		0-100		
FI	rst Southwest has	-	ressive	115+ 01	< cl	ients,	
A	Although they don't have as much debt issures as						
PFM their Volume of Finaugl Advisory involvement							
In de67 issues is impressive. Their price is							
SIGNIFICANTLY DIWER THAN PFM but their experience							
A	15 pretty gose to what PFM has to Offer A Junio 8/30/17 Andrew Sean-PIETTE						
<u> </u>	in stanger						
Sigr	nature of Evaluator	Date		Printed Name			

RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial Advisors

VEI	NDOR NAME: FF/VI FINANC	1al Adul 500					
1	Criter Experience and Expertise of firm			Point Range 0-20	Score		
	Knowledge and experience in structuring a	nd analyzing complex					
	debt issues, experience in providing service	es to municipal issuers.					
2	Qualifications of Individuals assigned to Including their experience and understanding		ty.	0-30	30		
3	Resources and Methodology General financing approach, strategies for I	bond issuance.		0-20	20		
4	References Client references for which similar services	have been performed.		0-10	10 AS 9/29/Y		
5	Cost The firm providing the lowest price to the Ci	ity will receive the maxim	um of 20	0-20	10		
	points Points will be awarded to other proposers in 20 – [20 points X (total cost – lowest total condition Note: If the result is a negative number, the Example: Proposal 1: \$100,000 Proposal, 2 Proposal 1 being the lowest, would achieve Proposal 2 would achieve a score of 14 poin 20 – [20 X (\$130,000 – \$100,000) / \$100,000 Including the overall project-task budget and	ost) / lowest total cost] score assigned will be 0 :: \$130,000 a score of 20 points nts, calculated as follows 00] = 14 points) :				
List	Total the reasons for this evaluation (justify the ra	ting/scoring):		0-100	88,90		
	PFM has issued significantly more debtissues						
in Florida, They are familiar with the City's							
Charter. They have experience with every type							
h	higher than what first southwest is proposing,						
A.	Jean nie 8/30/1)	Andre	w Jean-	pierr	e		
Sigr	ature of Evaluator Date	te	Printed Name				

RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: First Southwest (HillTop Securities)

	<u>Criteria</u>	<u>Point</u> Range	Score	
1	Experience and Expertise of firm Knowledge and experience in structuring and analyzing complex	0-20		
	debt issues, experience in providing services to municipal issuers.			
2	Qualifications of Individuals assigned to the City Including their experience and understanding of the needs of the City.	0-30	25	
3	Resources and Methodology General financing approach, strategies for bond issuance.	0-20	17	
4	References Client references for which similar services have been performed.	0-10	10 8	29/1
5	Cost The firm providing the lowest price to the City will receive the maximum of 20 points	0-20	20	
	Points will be awarded to other proposers in the following manner: 20 – [20 points X (total cost – lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 20 points Proposal 2 would achieve a score of 14 points, calculated as follows:			
	20 - [20 X (\$130,000 - \$100,000) / \$100,000] = 14 points Including the overall project-task budget and any itemized cost breakdowns.		2987	188
List	Total the reasons for this evaluation (justify the rating/scoring):	0-100	01 91	29/1
ay	opears to be an experienced firm, 3rd ranked in terms of PAR	value	of	
U	sue-Smaller clients. As fax as understanding the needs of Jus a little light on their response after reviewing the Cit	choch	arker.	
Pro	approach a methodology not as detailed as PFM. The side underwriting services in addition to financial Ad a Could propose a processed conflict, but firm represented they	Firm do	es also services not	Ň
	S. Sibble 8/30/17 Suzette Si	bble		し
Sign	involved in any city delf issue in an underwiting regulatory disciplinary action fines in the	capa violes t	city. Althorist Sovv pacity on	ugh 100

RFP E-34-17

FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial advisors, LLC

		<u>Criteria</u>		Point Score			
1	Experience and Expertise of firm Knowledge and experience in structu	uring and analyzing o	complex	0-20 20			
	debt issues, experience in providing	services to municipa	al issuers.				
2	Qualifications of Individuals assign Including their experience and under		ds of the City.	0-30 30			
3	Resources and Methodology General financing approach, strategi	es for bond issuance	э.	0-20 <u>30</u>			
4	References			0-10			
	Client references for which similar se	ervices have been pe	erformed.				
5	Cost The firm providing the lowest price to points	the City will receive	the maximum of 20	0-20 ()			
	Points will be awarded to other proposers in the following manner: 20 – [20 points X (total cost – lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 20 points Proposal 2 would achieve a score of 14 points, calculated as follows: 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points Including the overall project-task budget and any itemized cost breakdowns.						
List	Total the reasons for this evaluation (justify	the rating/scoring):		0-100 <u>90</u>			
	Excellent Firm. Has worled with Pompano for 7 years and as such						
is intimately familiar with our charter restrictions. Topranted							
Firm interno of PAR value issued nationally and in Ft. a volume							
	Planning etc. No disciplinary action/fines. Nounderwriting arm. Sibble 8/30/17 Suzelle Sibble						
Sigr	ature of Evaluator	Date	Printed Nam	е			