#### RFP E-34-17

#### FINANCIAL ADVISORY SERVICES

A Division of Hilltop Securities Southwest VENDOR NAME: +1 CST Criteria Score 0 - 20Experience and Expertise of firm Knowledge and experience in structuring and analyzing complex debt issues, experience in providing services to municipal issuers. 0 - 302 Qualifications of Individuals assigned to the City Including their experience and understanding of the needs of the City. 0 - 20Resources and Methodology General financing approach, strategies for bond issuance. 0 - 10References Client references for which similar services have been performed. 5 Cost 0-20 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 pointsIncluding the overall project-task budget and any itemized cost breakdowns. 0-100 Total List the reasons for this evaluation (justify the rating/scoring): Proposal in certain eneac knowled

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8/30/2017

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Signature of Evaluator

Date

reuco

**Printed Name** 

## RFP E-34-17

# FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial Advisors LLC

1	Crite Experience and Expertise of firm Knowledge and experience in structuring a	<del></del>		Point Range 0-20	Score 20		
	debt issues, experience in providing service	es to municipal issuers.			0 0		
2	Qualifications of Individuals assigned to Including their experience and understand		ty.	0-30	30		
3	Resources and Methodology General financing approach, strategies for	bond issuance.		0-20	20		
4	References			0-10	10		
	Client references for which similar services	s have been performed.					
5	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.						
List	<b>Total</b> the reasons for this evaluation (justify the r	ating/scoring):		0-100	90		
1 1 C	Very experienced with debt issues and understand the need of the city. Detailed graposol. Very good references Previous experience with the literard understand the coty charter						
	Spuant 8/30/	12017 Enje	to Digne	wh'			
Sigr	nature of Evaluator Da	ate /	Printed Name				

# RFP E-34-17

## FINANCIAL ADVISORY SERVICES

VENDOR NAME: First Southwest

	<u>Criteria</u>		<u>Point</u> Range	Score		
1	Experience and Expertise of firm  Knowledge and experience in structuring and analyzing	g complex	0-20	15		
	debt issues, experience in providing services to munici	pal issuers.		- 0		
2	Qualifications of Individuals assigned to the City Including their experience and understanding of the ne	eds of the City.	0-30	2/		
3	Resources and Methodology General financing approach, strategies for bond issuan	nce.	0-20	20		
4	References		0-10	8		
	Client references for which similar services have been	performed.				
5	Cost The firm providing the lowest price to the City will receive points	ve the maximum of 2	0-20 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 2 Proposal 2 would achieve a score of 14 points, calculated					
	20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$130,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,000) / \$100,000] = 14 points, calculated as 20 – [20 X (\$100,000 – \$100,00	nts	3.			
List	Total the reasons for this evaluation (justify the rating/scoring	):	0-100	90		
-11	rst Southwest has an imp	ressive 115	+ 0+ C/1	ents,		
A	Hough they don't have as	much de	6+ issure	s as		
PFM their Volume of Finaugl Advisory involvement						
11	in debt issues is impressive. Their price is					
SIGNIFICANTLY lower than PFM but their experience						
7	Symphin 8/30/17	PFM has Andrew	to Offer Jean-Pla	270		
Siar	nature of Evaluator Date		d Name			

## RFP E-34-17

## FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial Advisor

1	Experience and Expertise of firm Knowledge and experience in structuring			Point Range 0-20	Score	
2	debt issues, experience in providing ser		ipal issuers.	0-30	30	
2	Qualifications of Individuals assigne Including their experience and understa	100 Day	eds of the City.	0-30		
3	Resources and Methodology	for bond income		0-20	20	
	General financing approach, strategies	for bond issual	nce.		0	
4	References			0-10	8	
	Client references for which similar servi	ces have been	performed.			
5	<b>Cost</b> The firm providing the lowest price to th points	e City will rece	ve the maximum of 20	0-20	10	
	Points will be awarded to other propose 20 – [20 points X (total cost – lowest tot Note: If the result is a negative number, Example: Proposal 1: \$100,000 Propose Proposal 1 being the lowest, would achie Proposal 2 would achieve a score of 14 20 – [20 X (\$130,000 – \$100,000) / \$10 Including the overall project-task budge	tal cost) / lowes the score assi al, 2: \$130,000 ieve a score of points, calcula 00,000] = 14 po	t total cost] gned will be 0 20 points ted as follows: ints		0.0	
List	<b>Total</b> the reasons for this evaluation (justify th	e rating/scoring	g):	0-100	88	
	PFM has issued	Signific		le6+i	55Ues	
10	in Florida, They are familiar with the City's					
Charter. They have experience with every type						
at debt issue including P3's, Their price is						
h	igher than what q	Syst	southwest 15	5 prop	05/15	
A.	Jean nie 8/30/1	7	Andrew Jean	n-pierr	C	
Sigr	nature of Evaluator	Date	Printed Nam	ne		

# RFP E-34-17

# FINANCIAL ADVISORY SERVICES

VENDOR NAME: First Southwest (HillTop Securities)

	<u>Criteria</u>	Point 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.		0 =				
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				
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.						
List	Total the reasons for this evaluation (justify the rating/scoring):	0-100	89				
ay	appears to be an experienced firm, 3rd ranked in terms of PAR value of						
U	sue-Smallerclients. As fax as understanding the needs of vars a little light on their response after reviewing the Ci	to ch	aver.	-			
Pro	approach a methodology not as detailed as PFM. The vide underwriting services in a delition to financial as a Could propose a processed conflict, but firm represented they	firm do	es also Services not				
	S. Sibble 8/3/17 Suzette Si	bble		P			
Sign	nature of Evaluator  involved in any city delet issue in an underwithy providing brokerage stervices for the city, the firm by providing brokerage regulatory disciplinary author these in the	ricles to	city. Alt rese son acity o	hough			

## RFP E-34-17

# FINANCIAL ADVISORY SERVICES

VENDOR NAME: PFM Financial advisors, LLC

	AND COMMENT OF THE PARTY OF THE					
		Criteria		Point Score		
1	<b>Experience and Expertise of firm</b> Knowledge and experience in struct	uring and analyzing	g complex	0-20		
	debt issues, experience in providing	services to municip	oal issuers.			
2	Qualifications of Individuals assi Including their experience and unde		eds of the City.	0-30 <u>30</u>		
3	Resources and Methodology General financing approach, strateg	ies for bond issuan	ce.	0-20 <u>30</u>		
4	References Client references for which similar s	ervices have been բ	performed.	0-10 10		
5	Cost The firm providing the lowest price to points	o the City will receiv	ve the maximum of 20	0-20 10		
	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					
List	Total the reasons for this evaluation (justif			0-100 90		
Excellent Firm. Has worked with Pompano for 7 years and as such						
is intimately familiar with our charter restrictions. Topranted						
Firm interns of PAR value issued nationally and in Ft. a volume						
of experience in Go Bonds, Cox, P35, Revenue Bonds Bank Loans, Financial						
	Planning etc. No disciplinary action/Aines. Nounderwriting arm. S. Sibble 8/30/17 Suzelle Sibble					
Sigr	ature of Evaluator	Date	Printed Na	me		