



City of North Port
PURCHASING

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MEMORANDUM

TO: Peter Lear, City Manager
FROM: Keith Raney, Contract Administrator II
DATE: September 26, 2019
SUBJECT: RFP NO. 2020-03 FINANCIAL ADVISOR SERVICES

The Selection Committee held evaluations on September 16, 2019 as follows:

Consultants	Final Award Order
PFM Financial Advisors, LLC	1
Hilltop Securities	2
Public Resources Advisory Group	3

After polling the Committee, it is the recommendation of the Committee that the City move forward with negotiations with the top ranked firm. The Finance Director would like Kimberly Ferrell to conduct contract negotiations.

Approve to move forward with the Negotiations: YES NO

Approve the Negotiations Team: YES NO

Other: _____
_____ 9.27.19

Peter D. Lear, CPA, CGMA, City Manager

Date



CITY OF NORTH PORT

INITIAL RANKING TABULATION

RFP NO. 2020-03

DATED: 9/16/2019

Finance

Hill Top Securities		wt	V 0-5	Ferrell	wt	V 0-5	Skipper	wt	V 0-5	Branco
General Requirements	8	4	32	8	5	40	8	5	40	
Technical Requirements	8	4	32	8	4	32	8	4	32	
Cost to the City	4	4	16	4	4	16	4	4	16	
Local Business										
MBE/WBE/VBE Certification			-			-			-	
TOTALS			80			88			88	

PFM Financial Advisories		wt	V 0-5	Ferrell	wt	V 0-5	Skipper	wt	V 0-5	Branco
General Requirements	8	4	32	8	5	40	8	4	32	
Technical Requirements	8	5	40	8	4	32	8	4	32	
Cost to the City	4	5	20	4	5	20	4	5	20	
Local Business										
MBE/WBE/VBE Certification			-		#	-		#	#	-
TOTALS			92			92			84	

Public Resources Advisory Group		wt	V 0-5	Ferrell	wt	V 0-5	Skipper	wt	V 0-5	Branco
General Requirements	8	4	32	8	4	32	8	3	24	
Technical Requirements	8	4	32	8	5	40	8	4	32	
Cost to the City	4	3	12	4	3	12	4	3	12	
Local Business										
MBE/WBE/VBE Certification			-			-		#	-	
TOTALS			76			84			68	



CITY OF NORTH PORT
INITIAL RANKING TABULATION

RFP NO. 2020-03

DATED:9/16/2019

DEPT: Finance

SUMMARY	Ferrell		Skipper		Branco	
	Score	Rank	Score	Rank	Score	Rank
Hilltop Securities	80	2	88	2	88	1
PFM Financial Advisories	92	1	92	1	84	2
Public Resources Advisory Group	76	3	84	3	68	3

Method Based on Member Rankings

TOTAL OF SUMMARY	Sum of Member Ranks	Final Award Order *
Hilltop Securities	5	2
PFM Financial Advisories	4	1
Public Resources Advisory Group	9	3

Kim Ferrell 9/23/19

Kim Ferrell

Scott Skipper 9.17.19

Scott Skipper

Cari Branco 9/23/19

Cari Branco

