



**BUSINESS & PROFESSIONAL DEVELOPMENT DIVISION**  
**ASSIGNMENTS/CORRESPONDENCE**

**FROM: Vivian O. Walters, Jr.**

**DATE: January 29, 2014**

**Request for Approval**

**Signature and Date of Approval**

- Laurie Johnson
- Veronica Clark
- Gary Hartfield

\_\_\_\_\_  
*LJ 1/29/14*  
 \_\_\_\_\_  
*VC 1/31/14*  
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*GA 1/31/14*

**COMMENTS**

**Re: SBE Worksheets – Director’s Signature**

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**Logged out by**

\_\_\_\_\_

**Date**

**(PLEASE RETURN TO VIVIAN O. WALTERS, JR.)**



## Small Business Development Division Project Worksheet

**Project/Contract Title:** ARBITRAGE REBATE SERVICES **Received Date:** 01/21/2014  
**Project/Contract No:** RFP 857 **Funding Source:** USER. DEPT. REVENUES  
**Department:** FINANCE DEPARTMENT  
**Estimated Cost of Project/Bid:** \$400,000.00 **Resubmittal Date(s):** 01/24/2013  
**Description of Project/Bid:** To establish a contract soliciting proposals from qualified consultants to provide arbitrage rebate calculations and related services for existing and future bond issues that are subject to the Internal Revenue Code of 1986, as amended and applicable Treasury regulations.

Contract Measures Recommendation		
Measure	Program	Goal Percent
Selection Factor	SBE	

**Reasons for Recommendation**

SELECTION FACTOR

This project meets the criteria set forth in I.O. # 3-41.

The thirty-three (33) SBE firms certified in the required Commodity Codes were polled; three (3) responded as not able to satisfy the project requirements.

Reason for resubmittal: Project was not advertised in the required 180 days.

Commodity Code: 91804-Accounting/Auditing/Budget Consulting; 91849-Finance/Economics Consulting

Small Business Contract Measure Recommendation				
Subtrade	Cat.	Estimated Value	% of Items to Base Bid	Availability
<b>Total</b>				

**Living Wages:** YES  NO   
**Responsible Wages:** YES  NO

*Responsible Wages and Benefits applies to all construction projects over \$100,000 that do not utilize federal fund. For federally funded projects, unless prohibited by federal or state law or disallowed by a governmental funding source, the HIGHER wage between Davis Bacon and Responsible Wages and Benefits shall apply.*

REVIEW RECOMMENDATION			
Tier 1 Set Aside _____		Tier 2 Set Aside _____	
Set Aside _____	Level 1 _____	Level 2 _____	Level 3 _____
Trade Set Aside (MCC) _____		Goal _____	Bid Preference _____
No Measure _____	Deferred _____	Selection Factor _____	
CWP _____	SBD Director		1/31/14 Date