Project/Contract Title: FINANCIAL ADVISORY SERVICES (GENERAL SEGMENT)  
Received Date: 01/21/2014

Project/Contract No: RFQ859  
Department: FINANCE DEPARTMENT  
Funding Source: BOND PROCEEDS AND ADMIN. FUNDS

Estimated Cost of Project/Bid: $2,500,000.00  
Resubmittal Date(s): 01/30/2013

Description of Project/Bid: To establish a contract for the solicitation of responses from financial advisors, to provide financial advisory services for general and special obligation debt transactions and services. These transactions will include issuance of bonds, notes, certificates or other financing instruments, and exclude swaps or derivative products, and on-going advisory services ("Financial Advisory Services") for the County's General Segment.

![Table: Contract Measures Recommendation](image)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Program</th>
<th>Goal Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection Factor</td>
<td>SBE</td>
<td></td>
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</tbody>
</table>

**Reasons for Recommendation**

**SELECTION FACTOR**

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

The thirty-three (33) SBE firms certified in the required Commodity Codes were polled; one (1) 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; 94648-Financial Advisor

![Table: Small Business Contract Measure Recommendation](image)

<table>
<thead>
<tr>
<th>Subtrade</th>
<th>Cat.</th>
<th>Estimated Value</th>
<th>% of Items to Base Bid</th>
<th>Availability</th>
</tr>
</thead>
</table>

**Total**

Living Wages: YES [ ] NO [X]

Responsible Wages: YES [ ] NO [X]

*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 ____________________________

Signature: [Signature]

SDG Director  
Date 11/31/14