Small Business Development Division
Project Worksheet

Project/Contract Title: FINANCIAL ADVISORY SERVICES (ENTERPRISE SEGMENT)  
Project/Contract No: RFQ860  
Department: INTERNAL SERVICES DEPARTMENT  
Received Date: 01/21/2014  
Funding Source: BOND PROCEEDS & ADMIN. FUNDS  
Resubmittal Date(s): 01/30/2013  
Estimated Cost of Project/Bid: $1,500,000.00  
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 Enterprise Segment.

<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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Reasons for Recommendation

SELECTION FACTOR

This project meets the criteria set forth in 1.0. # 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

Small Business Contract Measure Recommendation

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

Set Aside Level 1

Trade Set Aside (MCC) Goal Bid Preference

No Measure Deferred Selection Factor

CWP Deferred

BD Director 1/3/14