

## Small Business Development Division Project Worksheet

Project/Contract Title:	FINANCIAL ADVISORY SERVICES (ENTERPRISE SEGMENT)		<b>Received Date:</b>	01/21/2014	
Project/Contract No: RFQ860			Funding Source: BOND PROCEEDS &	Resubmittal Date(s)	): 01/30/2013
Department:		NTERNAL SERVICES DEPARTMENT			
Estimated Cost of Project/Bio	\$1,500,000.00		ADMIN. FUNDS		
Description of Project/Bid:	special obligation debt transaction	s and services. These transaction	icial advisors, to provide financial adv ins will include issuance of bonds, note and on-going advisory services ("Fina	es, certificates or other	
	Cont	ract Measures Recomm	endation		
	Measure	Program	Goal Percent		
	Selection Factor	SBE			
	- · <b>R</b>	easons for Recommend	ation		
SELECTION FACTOR					
This project meets the criter	ia set forth in I.O. # 3-41.				
The thirty-three (33) SBE fine requirements.	rms certified in the required Con	modity Codes were polled;	one (1) responded as not able to	satisfy the project	1
Reason for resubmittal: Proj	ect was not advertised in the req	uired 180 days.			
Commodity Code: 91804-A	ccounting/Auditing/Budget Con	sulting; 94648-Financial Ac	ivisor		
	Small Busine	ss Contract Measure R			
<u>Subtrade</u>		<u>Cat</u> .		% of Items <u>o Base Bid</u> <u>Availabilit</u> y	
•	,				
		Total			
Living Wages: YES	NO X				
Responsible Wages: YES					
-		atte owar \$ 100 000 that do-	not utilize federal fund. For feder	ally funded projects	
	state law or disallowed by a gove		he HIGHER wage between Davis		
	RĒ	VIEW RECOMMENI	DATION		77
Tier 1 Set Aside	Tier 2 Set Aside				a na an
Set Aside	Level 1	Level 2	Level	3	

Trade Set Aside (MCC) \_\_\_\_\_ Goal \_\_\_\_ Bid Preference \_\_\_\_

\_ Deferred \_

No Measure

CWP \_\_\_\_\_

DBDR0090 v.20130116

131114

Date

Selection Factor

SBD Director