



Finance and Administrative Services Department

PURCHASING DIVISION

115 S. Andrews Avenue, Room 212 • Fort Lauderdale, Florida 33301 • 954-357-6066 • FAX 954-357-8535

DATE: August 30, 2018

TO: Bertha Henry
County Administrator

FROM: Brenda J. Billingsley, Director
Purchasing Division

**BRENDA
BILLINGSLEY**

Digitally signed by BRENDA BILLINGSLEY
DN: dc=cty, dc=broward, dc=bc,
ou=Organization, ou=BCC, ou=PU,
ou=Users, cn=BRENDA BILLINGSLEY
Date: 2018.08.30 13:01:32 -04'00'

SUBJECT: APPROVAL OF SHORT LISTING FOR:
RFQ No. GEN2116442P1, Library of Bond Underwriters
Estimated Total Cost: \$6,000,000

On May 8, 2018, the Board of County Commissioners approved the Request for Qualification (RFQ) No. GEN2116442P1, Library of Bond Underwriters. Twenty Two firms submitted proposals in response to the RFQ.

The Office of Economic and Small Business Development did not establish Sheltered Market requirements or County Business Enterprise participation goals for this project.

On August 8, 2018, a Short List meeting was held. The Evaluation Committee determined that all 22 firms were both Responsive and Responsible to the requirements of the RFQ, and voted in favor to shortlist ten firms.

The Evaluation Committee shortlisted the following firms:

Citigroup Global Markets Inc.
Estrada Hinojosa & Company, Inc.
Goldman Sachs & Co. LLC
Jefferies LLC
J.P. Morgan Securities LLC
Merrill Lynch, Pierce, Fenner & Smith Incorporated d.b.a Bank of America Merrill Lynch
Morgan Stanley & Co. LLC
Raymond James & Associates d.b.a Raymond James
RBC Capital Markets, LLC
Siebert Cisneros Shank & Co. L.L.C.

The Evaluation Committee's Proposed Short Listing was posted on the Purchasing Division website from August 9, 2018 to August 13, 2018, which provided an opportunity for any proposer or interested party to present any new or additional information regarding the responsibility of the proposers. No additional information was submitted within this timeframe.

Approval of Short Listing Memorandum
RFQ No. GEN2116442P1 Library of Bond Underwriters
August 30, 2018
Page 2 of 2

The Evaluation Committee's final recommendation of Short Listing was posted on the Purchasing Division website from August 14, 2018 to August 20, 2018, which provided an opportunity for any aggrieved proposer to file a formal protest. No protest was filed within this timeframe.

Pursuant to section 21.84-h. of the Procurement Code, after the final recommendation of ranking is posted, if no protest or objection has been filed, the County Administrator is authorized to approve all final rankings.

Additional supporting documentation provided to the Evaluation Committee regarding this procurement can be found on Broward County's Purchasing Division website at:

<http://www.broward.org/Purchasing/Pages/Repository.aspx>

The Evaluation Committee consisted of:

Martha Perez-Garviso, Purchasing Manager, Purchasing Division, Finance and Administrative Services Department (Chair and Non-Voting Member)

Monica Cepero, Deputy County Administrator, County Administration

Norman Foster, Director, Office of Management and Budget

George Tablack, Chief Financial Officer, Finance and Administrative Services Department

Douglas Wolfe, Assistant Director, Aviation Department

Ronald Thomas, Enterprise Director of Finance, Water and Wastewater Services, Public Works Department

The Purchasing Division and the Evaluation Committee recommend approval of the Short List.

APPROVED


County Administrator

DATE

9/4/18

Attachment

BJB/mc/mm

c: George Tablack, Chief Financial Officer, Finance and Administrative Services Department
Kevin B. Kelleher, Deputy CFO/Deputy Director, Finance and Administrative Services Department
Lori Fortenberry, Investment & Finance Coordinator, Finance and Administrative Services Department
(Project Manager)
Martha Perez-Garviso, Purchasing Manager, Purchasing Division, Finance and Administrative Services Department
Melissa Cuevas, Purchasing Agent, Purchasing Division, Finance and Administrative Services Department