JACKSONVILLE HOUSING FINANCE AUTHORITY

Jacksonville
Where Florida Begins.

MEMORANDUM

DATE: January 10, 2020

TO: Gregory Pease, Chairman
Professional Services Evaluation Committee

FROM: Laura Stagner-Crites, Director - Finance
Jacksonville Housing Finance Authority

SUBJECT: P-39-18 (Bond Underwriter)
Subcommittee Report

The Jacksonville Housing Finance Authority RFP subcommittee received two (2) responses for the above referenced item and found two (2) to be responsive, interested, qualified and available to provide the services required by the RFP. The proposals were independently evaluated by the subcommittee members utilizing the criteria outlined in the Purchasing Code as augmented by the RFP (see attached scoring matrix). The subcommittee members provided their scoring to Authority staff for calculation of the average scores for each vendor in each of the ten (10) categories.

Based on the above, the following firms, listed alphabetically, were determined to be the most qualified of those submitting proposals. The ranking of first, second, and third designates the order of qualifications of these firms to perform the required services:

(2) – Raymond James
(1) – RBC Capital Markets

We are submitting the attached information for your review and discussion at the next PSEC meeting.

Please do not hesitate to contact me if you need additional information or if you have any questions or concerns. Thank you.

Attachments: Scoring Matrix (Averaged)
Scoring Matrix (Subcommittee Member – Citrano)
Scoring Matrix (Subcommittee Member – Gulliford)

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totals	EVALUATION SCALE							PROJECT NO.:	P-39-18		
1.....20								PROJECT TITLE:	**Underwriter**		
QUALIFIED	EXTREMELY QUALIFIED										
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	
FIRM (In Alphabetical Order)	**COMPETENCE**	**CURRENT WORK LOAD**	**FINANCIAL RESPONSIBILITY**	**Ability to observe and advise whether plans and specifications are being complied with, where applicable**	**Past record of professional accomplishments**	**Proximity to the project involved**	**Past and present demonstrated commitment to small and minority businesses and contributions toward a diverse market place**	**Ability to design an approach and work plan to meet the project requirements, where applicable**	**Quotation of rates, fees or charges and other detailed cost proposal or cost breakdown information**	**The volume of current and prior work performed for using agencies shall be considered a minus factor**	**OVERALL**
MAXIMUM POINTS	**20**	**5**	**10**	**5**	**20**	**5**	**10**	**5**	**15**	**5**	
Raymond James	20.00	5.00	10.00	5.00	17.50	3.50	7.00	4.50	11.00	5.00	88.50
RBC Capital Markets	20.00	5.00	10.00	5.00	20.00	3.50	9.50	5.00	12.50	4.00	94.50