

Recommendation for Financial, Management, Policy and Debt Consulting and Advisory Services Selection
RFP 6100033762
Issued April 24, 2015



REQUEST FOR PROPOSALS
Financial, Management, Policy and Debt Consulting and Advisory Services Selection

RECOMENDATION FOR SELECTION

Date: June 15, 2015

To: Jenny Doherty
Chief Procurement Officer

From: Margaret Mary Juran
Issuing Officer

RE: Evaluation of Proposals Submitted in Response to
RFP 6100033762

Part I.

This RFP was issued in accordance with Section 518 of the Commonwealth Procurement Code, 62 Pa.C.S. §518, and Part III Chapter 8 of the Department of General Services (DGS) Procurement Handbook. The Issuing Office designated to conduct the **Financial, Management, Policy and Debt Consulting and Advisory Services** procurement has completed its evaluation. As further described below, the following Contractor is recommended for selection for contract negotiations for Financial, Management, Policy and Debt Consulting and Advisory Services:

Public Financial Management, Inc.

This memorandum also documents that all necessary steps were taken in conducting the procurement in accordance with the provisions of the Commonwealth Procurement Code. To the extent that written determinations are required under the Code for any of the following steps and no attached record exists, this memorandum shall serve as written confirmation that such step occurred.

Part II.

- A. PUBLIC NOTICE: Public notice of the RFP was posted on the DGS website on **April 24, 2015.**

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- B. **EVALUATION COMMITTEE:** An evaluation committee was established consisting of agency representatives from the **Office of the Budget and the Department of General Services**.
- C. **ADDENDA TO THE RFP:** Potential Offerors were given the opportunity in accordance with Section I-8 of the RFP to submit questions concerning the procurement to the Issuing Office. The official responses to the questions were incorporated into the RFP by addenda per Section I-9 of the RFP.

Part III.

- A. **CRITERIA:** The relative importance of the major evaluation criteria established prior to opening the proposals consisted of **Technical 60%, Cost 20% and Small Diverse Business participation 20%**.
- B. **PROPOSALS:** A total of **three (3)** proposals were received on or before the due date of **May 15, 2015**.
- C. **RESULTS:**
1. The evaluation committee reported the results of its technical evaluation to the Issuing Office.
 2. As indicated in the Overall Scoring, **one (1)** Offeror's technical submittal failed to receive **75%** of the available technical points required in order to be eligible to be considered for award.
 3. The Issuing Office evaluated and scored the cost proposals and combined the technical scores, cost scores, and the SDB scores received from the DGS Bureau of Small Business Opportunities.
 4. **OVERALL SCORING:** The overall scoring for this procurement concluded as follows:

<i>Offeror</i>	<i>Technical Score</i>	<i>SDB Score</i>	<i>Price Score</i>	<i>Overall Score</i>
Public Financial Management, Inc.	600.00	100.00	192.00	892.00
Public Resources Advisory Group	573.12	---	200.00	773.12
<i>Law Firms NOT meeting 75% Technical Threshold</i>				

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Phoenix Capital Partners	386.25	n/a	n/a	n/a
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5. **HIGHEST OVERALL SCORES:** After combining the final technical scores, small diverse business participation scores, cost scores and bonus points in accordance with the relative weights assigned to these areas and fixed prior to the opening of the proposals, the proposal that received the highest overall score was submitted by:

Public Financial Management, Inc.

6. **SMALL DIVERSE BUSINESS COMMITMENTS:**

As part of its proposal, Public Financial Management, Inc. has committed to subcontracting with three (3) small diverse businesses for **Financial, Management, Policy and Debt Consulting and Advisory Services** over the entire engagement timeframe. **Public Financial Management, Inc.** is committing:

5 % (or \$37,500.00) of the total value of its offering to MFR Consultants, Inc.;
5 % (or \$37,500.00) of the total value of its offering to The Kapoor Company; and
5 % (or \$37,500.00) of the total value of its offering to Sustainable Capital Advisors.

This represents approximately \$112,500.00 over three (3) years contingent upon purchase and service volume.

As part of their proposals, Phoenix Capital Partners and Public Resources Advisory Group made no commitments to small diverse businesses.

7. **CONTRACTOR RESPONSIBILITY:** **Public Financial Management, Inc.** and their respective subcontractors required to be disclosed or approved by the Commonwealth have been verified as responsible contractors in accordance with management directives, the Procurement Handbook and the Procurement Code, as applicable.

PART IV.

RECOMMENDATION: As the Issuing Officer, I recommend that **Public Financial Management, Inc.** be selected for contract negotiations. This recommended selection is based upon the results of the evaluation and review of the proposals as summarized above. Based on the cost submittal of this Offeror, the value of the contract is estimated to be \$117,000.00. The term of the contract will be Three (3) years with Two (2) 1-Year additional renewals.

PART V.

CONTRACTING OFFICER DETERMINATION:

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Based upon the results of the evaluation and the above recommendation, I have determined that Public Financial Management, Inc. is the best qualified offeror based on the evaluation factors set forth in the RFP.



I disapprove the recommendation.

for Bruce Doherty
Jenny Doherty or Designee
Contracting Officer

JUNE 16 2015
Date

PART VI.

AGENCY HEAD AUTHORIZATION:

Based upon the Contracting Officer's determination, I authorize the Issuing Office to proceed with contract negotiations with Public Financial Management, Inc.

Randolph Albright
Randolph Albright
Secretary of the Budget

6-16-2015
Date