

RFP# 565-11701
TITLE: Cemetery Trust Fund Services
DATE: 3/29/2016

		Rater #1 - S. Spates												
		Understanding needs of City as presented in narrative proposal			Ability to produce meaningful reports, Ability to evaluate fund performance, Quality of the investment manager process			Investment philosophy and hypothetical investment Strategy for current Fund			Total Project Cost for 5 years			
PROPOSING FIRM		Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Total Points Awarded
SunTrust		0.30	1	0.30	0.20	1	0.20	0.20	1	0.20	0.30	1	0.30	1.00
Landmark Bank/Chandler Asset		0.30	3	0.90	0.20	3	0.60	0.20	3	0.60	0.30	2	0.60	2.70
Key Bank		0.30	2	0.60	0.20	2	0.40	0.20	2	0.40	0.30	3	0.90	2.30
Janney Montgomery		0.30	4	1.20	0.20	4	0.80	0.20	4	0.80	0.30	4	1.20	4.00

		Rater #2 - J. Lowe												
		Understanding needs of City as presented in narrative proposal			Ability to produce meaningful reports, Ability to evaluate fund performance, Quality of the investment manager process			Investment philosophy and hypothetical investment Strategy for current Fund			Total Project Cost for 5 years			
PROPOSING FIRM		Weight Factor			Weight Factor			Weight Factor			Weight Factor			Total Points Awarded
		Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal		
SunTrust		0.30	1	0.30	0.20	1	0.20	0.20	2	0.40	0.30	1	0.30	1.20
Landmark Bank/Chandler Asset		0.30	3	0.90	0.20	2	0.40	0.20	1	0.20	0.30	2	0.60	2.10
Key Bank		0.30	2	0.60	0.20	3	0.60	0.20	3	0.60	0.30	3	0.90	2.70
Janney Montgomery		0.30	4	1.20	0.20	4	0.80	0.20	4	0.80	0.30	4	1.20	4.00

		Rater #3 - P. Winston												
		Understanding needs of City as presented in narrative proposal			Ability to produce meaningful reports, Ability to evaluate fund performance, Quality of the investment manager process			Investment philosophy and hypothetical investment Strategy for current Fund			Total Project Cost for 5 years			
PROPOSING FIRM		Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Total Points Awarded
SunTrust		0.30	1	0.30	0.20	1	0.20	0.20	0.20	0.30	0.30	0.20	0.30	1.00
Landmark Bank/Chandler Asset		0.30	3	0.90	0.20	2	0.40	0.20	3	0.60	0.30	2	0.60	2.50
Key Bank		0.30	2	0.60	0.20	3	0.60	0.20	2	0.40	0.30	3	0.90	2.50
Janney Montgomery		0.30	4	1.20	0.20	4	0.80	0.20	4	0.80	0.30	4	1.20	4.00

		Rater #4 - V. Mowrey												
		Understanding needs of City as presented in narrative proposal			Ability to produce meaningful reports, Ability to evaluate fund performance, Quality of the investment manager process			Investment philosophy and hypothetical investment Strategy for current Fund			Total Project Cost for 5 years			
PROPOSING FIRM		Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Total Points Awarded
SunTrust		0.30	1	0.30	0.20	3	0.60	0.20	3	0.60	0.30	2	0.60	1.00
Landmark Bank/Chandler Asset		0.30	3	0.90	0.20	3	0.60	0.20	3	0.60	0.30	2	0.60	2.70
Key Bank		0.30	2	0.60	0.20	2	0.40	0.20	2	0.40	0.30	3	0.90	2.30
Janney Montgomery		0.30	4	1.20	0.20	4	0.80	0.20	4	0.80	0.30	4	1.20	4.00

		Rater #5 - M. Van Rees																
		Understanding needs of City as presented in narrative proposal			Ability to produce meaningful reports, Ability to evaluate fund performance, Quality of the investment manager process			Investment philosophy and hypothetical investment Strategy for current Fund			Total Project Cost for 5 years							
PROPOSING FIRM	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Total Points Awarded	Total Combined Points	Local Vendor Preference	Local Preference Deduction	Total Final Score	FINAL RANKING
SunTrust	0.30	1	0.30	0.20	1	0.20	0.20	1	0.20	0.30	1	0.30	1.00	5.20	5%	0.26	4.94	1
Landmark Bank	0.30	3	0.90	0.20	3	0.60	0.20	2	0.40	0.30	2	0.60	2.50	12.50	0%	0	12.5	3
Key Bank	0.30	2	0.60	0.20	2	0.40	0.20	3	0.60	0.30	3	0.90	2.50	12.30	0%	0	12.3	2
Janney Montgomery	0.30	4	1.20	0.20	4	0.80	0.20	4	0.80	0.30	4	1.20	4.00	20.00	0%	0	20	4