

## CITY OF FORT LAUDERDALE RFP EVALUATION COMMITTEE TABULATION - FINAL RANKING

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

	Data #4 C Castra														
		Rater #1 - S. Spates													
				Α	bility	to									
				р	roduc	e									
				me	aning	ful									
				r	eport	5,									
				A	bility	to									
					uate 1			estm							
		Understanding			orma		philo								
		needs of City as			Quality of the			othet							
		presented in investment						estm	-						
					anag			itegy			ject				
		ropos		process			current Fund			Cost	for 5				
PROPOSING FIRM	Weight Facto	Bu	Point Subtota	Weight Facto	Bu	Subtota	Weight Facto	ng Bu	Point Subtota	Weight Facto	Bu	Point Subtota	Points ded		
	Weigl	Ranking	Point	Weigl	Ranking	Point	Weigl	Ranking	Point	Weigl	Ranking	Point	Total Poir Awarded		
SunTrust	0.30	1		0.20		0.20				0.30		0.30			
Landmark Bank/Chandler Asset	0.30	3	0.90	0.20	3	0.60	0.20	3	0.60	0.30		0.60			
Key Bank	0.30		0.60			0.40				0.30		0.90			
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													
	Unde	erstar	nding	p me r A eval	bility froduce eaning eports bility from a uate f	e gful s, to fund		estme						
	need pre na		ity as d in ve	Qua inv	lity of estmi anage	f the ent er	hyp inv Stra	othet estme ategy ent F	ical ent for	Tot Cost				
PROPOSING FIRM	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtotal	Weight Factor	Ranking	Point Subtota	Total Points Awarded	
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														
·				А	bility	to									
					roduc										
					aning										
				n	eport	5,									
				А	bility	to									
				eval	uate i	und	Inv	estm	ent						
	Unde	erstar	nding	perf	orma	nce,	philo	sophy	and						
	need	s of C	ity as	Quality of the			hyp	othet	ical						
	pre	sente	d in	investment			inv	estm	ent						
	na	arrati	ve	manager			Stra	itegy	for	Total Project					
	р	ropos	al	process			curr	ent F	und	Cost	years				
	Factor		btotal	Factor		btotal	Factor		btotal	Factor		btotal	ints d		
PROPOSING FIRM	Weight Factor	Ranking	Point Subtota	Weight Factor	Ranking	Point Subtota	Weight Factor	Ranking	Point Subtota	Weight Factor	Ranking	Point Subtota	Total Points Awarded		
SunTrust	0.30	1	0.30	0.20		0.20				0.30		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		0.60		2	0.40	0.30	3	0.90			
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													
	need pre	sente	ity as d in	p me r A eval peri Qua inv	bility roduce eaning eport bility uate forma lity of estm	e ful s, to und nce, the	philo hyp inv	estmo sophy othet estmo	and ical ent					
	narrative proposal			manager process				ategy ent F			ject 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		0.30				0.20			0.30		0.30		
Landmark Bank/Chandler Asset	0.30	3	0.90	0.20	3	0.60	0.20	3	0.60	0.30		0.60	2.70	
Key Bank	0.30		0.60				0.20			0.30		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																	
	na		ity as d in re	Ability to produce meaningful reports, Ability to evaluate fund performance,		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%	0.26		1
Landmark Bank	0.30		0.90				0.20			0.30		0.60		12.50	0%	0	12.5	3
Key Bank	0.30		0.60				0.20			0.30		0.90	2.50		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