

Committee Evaluation Summary

RFP 22-500621 Investment Consulting and Procurement Record Keeping Services

Criteria (points)	Segal Advisors	Financial Integrity Resources Mgmt.
Technical Approach (20 points)	Responder has detailed plan for reaching the goals of the project. As they are the incumbent, they do not present any of their technical approach as an improvement on their current processes. Technical approach used to provide record keeping services enable them to propose must lower cost proposal.	Responder has plan for reaching the goals of the project. Plan is a little hard to follow in its presentation. Presents many things that are trademarked or services that appear to be bought from other providers.
Project Management (25 point)	Responder has detailed description of how project will be managed, includes subcontractors/LSBE partner, and describes the resources they will use. They have a local office.	Responder provides some description of how the project will be managed, but seems light. Includes the use of three subcontractors. Does not mention a local office (not required.) Schedule provide;
Organization Qualifications (25 points)	Incumbent provider for the County; very positive rating by County.	Not clear that firm has good grasp of what the RFP requires.
Financial Responsibility (5 Points)	Very Satisfactory cash position; Longevity in business very positive, 54 years.	Would not provide financials without open records request from the County.
References (5 points)	Excellent rating by all references.	References non-responsive to inquiry, but those received very good.
LSBE Participation (Max. 10)	Full participation with LSBE MSA vendor.	Full participation with LSBE MSA and DeKalb vendors.
Cost (10 points)	Lowest proposal	Doubled lowest cost proposal