



# DeKalb County Government

Manuel J. Maloof Center  
1300 Commerce Drive  
Decatur, Georgia 30030

## Legislation Details (With Text)

**File #:** 2022-2365    **Version:** 1    **Name:**  
**Type:** Resolution    **Status:** Action  
**File created:** 10/13/2022    **In control:** Board of Commissioners  
**On agenda:** 11/8/2022    **Final action:**  
**Title:** Commission District(s): ALL  
RFP - Request for Proposals No. 22-500623 Financial Advisory Services (3 Year Multiyear Contract with 2 Options to Renew): for use by the Finance Department. Consists of providing financial advisory services in connection with various financing transactions and programs. Services will also require acting as the County's "municipal advisor" as contemplated by the Dodd-Frank Wall Street Reform and Consumer Protection Act ("Dodd-Frank") and the Securities and Exchange Commission's Rule 15bA-1 (the "Municipal Advisor Rule"). Recommend award to: PFM Financial Advisors, LLC. Amount Not To Exceed: \$1,664,500.00.

### Indexes:

**Attachments:** 1. Substitute 2022 10.25 Item 2022-2365

Date	Ver.	Action By	Action	Result
11/8/2022	1	Board of Commissioners	approved	Pass
11/7/2022	1	FAB-Finance, Audit & Budget Committee	recommended for approval.	Pass
10/25/2022	1	FAB-Finance, Audit & Budget Committee	recommended for deferral	Pass
10/25/2022	1	Board of Commissioners		
10/18/2022	1	Committee of the Whole	Accepted to the BOC agenda and assigned	

### Substitute

**Purchasing Type:** Request for Proposals (RFP)

**Public Hearing:** YES ☐ NO ☒

**Department:** Purchasing & Contracting

### AGENDA ITEM:

**Commission District(s):** ALL

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**Information Contact:** Michelle Butler, Procurement Manager

**Phone Number:** (404) 687-3581

### PURPOSE:

Consists of providing financial advisory services in connection with various financing transactions and programs. Services will also require acting as the County's "municipal advisor" as contemplated by the Dodd-Frank Wall Street Reform and Consumer Protection Act ("Dodd-Frank") and the Securities and Exchange Commission's Rule 15bA-1 (the "Municipal Advisor Rule"). Three (3) proposals were received.

**RECOMMENDATION:**

Recommend award to the highest scoring proposer with:

PFM Financial Advisors LLC, 1735 Market Street, 42<sup>nd</sup> Floor, Philadelphia, PA 10103

Amount Not To Exceed: \$1,664,500.00

and authorize the Chief Executive Officer to execute the change order and all associated documents.

**Evaluation Committee Scores**

<u>Firm:</u>	<u>Score:</u>
First Tryon Securities, LLC dba	88
First Tryon Advisors	
Davenport & Company, LLC	92
PFM Financial Advisors, LLC	97

After evaluation of the technical and cost proposals, the recommendation is to award to the highest scoring, responsive and responsible proposer.

**ADDITIONAL INFORMATION:**

1. Contract Effective Date:	Date of Contract Execution
2. Contract Expiration Date:	December 31, 2025
3. Amount Spent On Previous Contract:	\$301,809.98
4. Funding:	General and Enterprise