

RFP PS-25-0542 Investment Consulting Services

Evaluation Criteria

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	<p>Evaluation Criteria #1 –Experience and Qualifications</p> <p>A. The Offeror shall provide a company overview as well as an organizational chart of the firm. Please identify Senior Management, their Major Responsibilities, and the organizational units they supervise. Identify the organizational unit and key personnel that would be responsible for providing services under any contract resulting from this RFP (Reference 2.5.4.C of Scope of Work).</p> <p>B. The Offeror shall provide a description of its experience in performing financial and investment advisory services similar to those identified under the Scope of Work to a Board of Trustees within a governmental entity or similar in the last five (5) years (Reference 1.3 Minimum Qualifications).</p> <p>C. The Offeror shall describe its experience in providing valuable service to clients. Please include the firm’s client-to-consultant ratio and how it upholds a fiduciary standard of care for clients. (Reference 2.5.3 of Scope of Work).</p>	Points Based	350 (35% of Total)

2.	<p>Evaluation Criteria #2 – Method of Approach</p> <p>A. The Offeror shall provide their methodology and sources of data to assess investment fund performance, including the criteria considered when analyzing performance and recommending an investment fund. (Reference 2.5.3.F. of Scope of Work).</p> <p>B. The Offeror shall provide a description of their theory and methodology for (i) developing asset allocation models, (ii) establishing asset class risk and return assumptions, (iii) modeling asset classes, and (iv) reviewing its capital market expectations in light of actual performance. (Reference 2.5.3.A of Scope of Work).</p> <p>C. The Offeror shall describe the firm’s internal controls and procedures to prevent unauthorized access to any information, data, records or systems related to Trust Funds (Reference 2.5.3.C of Scope of Work).</p>	Points Based	300 <i>(30% of Total)</i>
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3.	<p>Evaluation Criteria #3 - Capacity</p> <p>A. The Offeror shall provide the number of governmental and institutional clients serviced by the firm and the total assets under advisement at the end of each of the last five (5) calendar years. Please describe how the firm will effectively provide services to the City considering the aforementioned portfolio of the firm. (Reference 1.3 Minimum Qualifications).</p> <p>B. The Offeror shall describe its capacity to retain key staff, reduce key staff turnover, and ensure the City will always have a designated staff representative. (Reference 2.5.4.D of Scope of Work).</p> <p>C. The Offeror shall describe how it manages and mitigates conflicts of interest. (Reference 2.5.3.K of Scope of Work).</p>	Points Based	200 <i>(20% of Total)</i>
4.	<p>Evaluation Criteria #4 - Price</p> <p>See Pricing Proposal</p>	Points Based	150 <i>(15% of Total)</i>