

Project - Investment Consulting Services

MWBE Commitment	
Percent goal met or good faith effort made?	Points
Certified M/WBE Compliance-Primary Vendor. (1) Submitted their M/WBE certificate in their proposal; OR (2) Will award required portion of the project to a named M/WBE certified subcontractor; OR (3) Has certified they made a good faith effort to comply but were unable to locate a qualified M/WBE subcontractor.	5
Not Qualified. Vendors proposal indicated that they do not qualify for the M/WBE certification nor do they comply with the M/WBE subcontract participation requirement.	0
Business Location	
	Points
Within Winston-Salem	5
Within North Carolina	3
Outside of North Carolina	0
Cost Effectiveness / Price Value	
	Points
Lowest cost compared to other proposals	5
Less than 25% above lowest proposal	4
25% - 50% above lowest proposal	3
50% - 100% above lowest proposal	2
Greater than 100% above lowest proposal	0
Relevant Experience	
Qualifications	Points
Superior: Proposer fully addresses all aspects of the criterion, convincingly demonstrates that it will meet the project's performance requirements, and demonstrates no weaknesses.	5
Above Average: Proposer fully addresses all aspects of the criterion, convincingly demonstrates a likelihood of meeting the project's requirements, and demonstrates only a few minor weaknesses.	4
Average: Proposer addresses all aspects of the criterion and demonstrates the ability to meet the project's performance requirements. May contain significant weaknesses and/or a number of minor weaknesses.	3
Below Average: Proposer does not address all aspects of the criterion nor is evidence presented indicating the likelihood of successfully meeting the project's requirements. Significant weaknesses are demonstrated and clearly outweigh any strengths presented.	2
Poor: Proposer does not address all aspects of the criterion and the information presented indicates a strong likelihood of failure to meet the project's requirements.	1
Proposer does not meet the minimum qualifications	0
Reference List Of Governmental Clients	
Qualifications	Points
Has significant experience, providing 5 or more verifiable references/clients	5
Has great experience, providing 4 or more verifiable reference/clients	4
Has average experience, providing 3 or more verifiable references/clients	3
Fewer than 3 verifiable references/clients were provided.	1
Did not include verifiable references/clients	0

Firm Name: Alex. Brown, a Division of Raymond James			
Evaluation Criteria	Weight	Grade	Total
M/WBE Commitment	20.00	5.00	100.00
Business Location	20.00	5.00	100.00
Cost Effectiveness / Price Value	15.00	3.00	45.00
Relevant Experience	30.00	4.40	132.00
Reference List of Governmental Clients	15.00	3.20	48.00
			425.00
Max Score = 500			

Firm Name: UBS Financial Services, Inc.			
Evaluation Criteria	Weight	Grade	Total
M/WBE Commitment	20.00	0.00	0.00
Business Location	20.00	5.00	100.00
Cost Effectiveness / Price Value	15.00	4.00	60.00
Relevant Experience	30.00	4.60	138.00
Reference List of Governmental Clients	15.00	5.00	75.00
Final Score			373.00
Max Score = 500			

Business Name: Dahab Associates			
Evaluation Criteria	Weight	Grade	Total
M/WBE Commitment	20.00	0.00	0.00
Business Location	20.00	0.00	0.00
Cost Effectiveness / Price Value	15.00	5.00	75.00
Relevant Experience	30.00	4.40	132.00
Reference List of Governmental Clients	15.00	3.40	51.00
Final Score			258.00
Max Score = 500			

Firm Name: Sterling Capital Management LLC			
Evaluation Criteria	Weight	Grade	Total
M/WBE Commitment	20.00	0.00	0.00
Business Location	20.00	0.00	0.00
Cost Effectiveness / Price Value	15.00	0.00	0.00
Relevant Experience	30.00	3.80	114.00
Reference List of Governmental Clients	15.00	5.00	75.00
Final Score			189.00
Max Score = 500			