

Project - Financial Advisory 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	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	
Response	Points
Within Forsyth County	5
Within North Carolina	3
Outside of North Carolina	0
Cost Effectiveness/Price Value	
Rating	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 Qualifications / Experience	
Response	Points
Superior: Proposer fully addresses all aspects of the criterion, demonstrates no weaknesses. Has 10+ years experience providing financial advising services to government units of similar size	5
Above Average: Proposer fully addresses all aspects of the criterion, demonstrates only a few minor weaknesses. Has 6-9 years experience providing financial advising services to government units of similar size	4
Average: Proposer addresses all aspects of the criterion, demonstrates a number of minor weaknesses. Has a minimum of 5 years experience providing financial advising services to government units of similar size	3
Below Average: Proposer does not address all aspects of the criterion, demonstrates significant weaknesses. Has 2-5 years of experience providing financial advising services to government units of similar size	2
Poor: Proposer does not address any aspects of the criterion. Has less than 2 years of experience providing financial advising services to government units of similar size	0
Reference List of Government Clients	
Response	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

EXHIBIT B

Firm Name: PFM Financial Advisors 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	10.00	0.00	0.00
Relevant Experience	25.00	0.00	0.00
Reference List of Governmental Clients	25.00	0.00	0.00
Final Score	Max Score = 500		0.00
Firm Name: Wye River Group			
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	10.00	5.00	50.00
Relevant Experience	25.00	5.00	125.00
Reference List of Governmental Clients	25.00	5.00	125.00
Final Score	Max Score = 500		300.00

*Although located in NC, the firm failed to submit appropriate verification for location points