



Interoffice Memorandum

March 2, 2020

TO: Mayor Jerry L. Demings
and the Board of County Commissioners

FROM: Carrie Mathes, CFCM, CPPO, C.P.M., Manager, Procurement
Division

CONTACT: Fred Winterkamp, Manager, Fiscal and Business Services
Division
(407) 836-2920

SUBJECT: Selection of Firms for Financial Legal Counsel, Request for
Proposals Y20-186-KB

Selection of Firms for Financial Legal Counsel Request for Proposals Y20-186-KB,
from the following firms:

SEC Disclosure Counsel (Select one firm and two ranked alternates)

Greenberg Traurig, P.A.
Nabors, Giblin & Nickerson P.A.
Watson Sloane PLLC

Sales Tax and Utilities Revenue Bond Counsel (Select two firms)

Greenberg Traurig, P.A.
Nabors, Giblin & Nickerson P.A.

Special Services Bond Counsel (Select one firm and an alternate)

Greenberg Traurig, P.A.
Nabors, Giblin & Nickerson P.A.

Further request authority for the Procurement Division to negotiate and execute a three-year contract with the selected firms within a budget amount of \$750,000 per category. Further request authorization to renew the contracts for two additional one-year terms. The Procurement Committee evaluated the proposals on February 13, 2020. Commissioner Betsy VanderLey was assigned to the committee.

PURPOSE

This contract will provide financial legal counsel for SEC Disclosure, Sales Tax and Utilities Revenue Bonds, and Special Services Bonds.

DISCUSSION

Fees under these contracts shall consist of hourly rates and fixed amounts. The firms selected to provide financial legal counsel services will provide the following basic services under the categories listed:

a. SEC Disclosure Counsel

Assist the County with the disclosure of information to the investment community required by state and federal law and industry regulation in conjunction with its outstanding bond, note, and commercial paper issues, on a continuing basis.

b. Sales Tax and Utilities Revenue Bond Counsel

Provide bond and tax counsel services in connection with Sales Tax Revenue Bonds, Solid Waste Facility Revenue Bonds, Water Utilities System Revenue Bonds, and Public Services Tax/Communications Service Tax Revenue Bonds. Also includes other revenue sources based on entitlements, fees, grants, and service payments used for bonds from time-to-time to finance or refinance costs in connection with allowable projects. This includes previous County debt issued as Capital Improvement Bonds and Public Facilities Revenue Bonds, and any future bonds contemplated from then available entitlements, fees, grants, and service payments.

c. Special Services Bond Counsel

Provide bond and tax counsel services in connection with Tourist Development Tax Revenue Bonds, lease financing, tax increment financing and assistance in the review and approval of conduit debt that appears before the County from time-to-time.

Services provided by these firms assist the County in a broad spectrum of governmental financial matters involving various revenue sources, and involving various aspects of local, state, and federal law. Firms often specialize in or excel in segments of governmental financial practice, depending on past work and staff expertise.

The SEC Disclosure Counsel will serve on all financial projects because the disclosure to the financial markets regarding County financial matters has a cumulative effect and disclosure from one matter often impacts and must coordinate with disclosure on another matter to maintain a consistent message in the marketplace.

One of the two bond counsels will provide the authorizing documents according to local and state law, and the federal tax guidance for the various financial projects. Together, the disclosure counsel and the bond counsel assist the debt issuance working group as they cooperate without undertaking overlapping duties.

The Procurement Committee's consensus scores by category are attached.

RFP# Y20-186-KB
 FINANCIAL LEGAL COUNSEL

SEC DISCLOSURE COUNSEL

	QUALIFICATION OF STAFF		QUALIFICATION OF FIRM		TECHNICAL APPROACH		LOCATION		FEE PROPOSAL		M/WBE PARTICIPATION		DISPL. WORKER	SDV PRIME	SDV SUBS	TOTAL
WEIGHT:	20		20		20		10		20		10		5	5	10	
POINT STRUCTURE: 1= Poor 4= Above Avg. 2= Below Avg. 5= Excellent 3= Average	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	BONUS POINTS	BONUS POINTS	BONUS POINTS	
FIRM NAME:																
Greenberg Traurig P.A.	5.00	100.00	5.00	100.00	5.00	100.00	5.00	50.00	4.00	80.00		50.00	-	-	-	480.00
Watson Sloane PLLC	3.00	60.00	2.00	40.00	3.00	60.00	5.00	50.00	5.00	100.00		50.00	-	-	-	360.00
Nabors, Giblin & Nickerson P.A.	4.00	80.00	4.00	80.00	4.00	80.00	1.00	10.00	3.00	60.00		25.00	-	-	-	335.00

RFP# Y20-186-KB
 FINANCIAL LEGAL COUNSEL

SALES TAX AND UTILITIES REVENUE BOND COUNSEL

	QUALIFICATION OF STAFF		QUALIFICATION OF FIRM		TECHNICAL APPROACH		LOCATION		FEE PROPOSAL		MWBE PARTICIPATION		DISPL. WORKER	SDV PRIME	SDV SUBS	TOTAL
WEIGHT:	20		20		20		10		20		10		5	5	10	
POINT STRUCTURE: 1= Poor 4= Above Avg. 2= Below Avg. 5= Excellent 3= Average	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	BONUS POINTS	BONUS POINTS	BONUS POINTS	
FIRM NAME:																
Greenberg Traurig P.A.	4.00	80.00	4.00	80.00	4.00	80.00	5.00	50.00	5.00	100.00		50.00	-	-	-	440.00
Nabors, Giblin & Nickerson P.A.	5.00	100.00	5.00	100.00	5.00	100.00	1.00	10.00	5.00	100.00		25.00	-	-	-	435.00

RFP# Y20-186-KB
 FINANCIAL LEGAL COUNSEL

SPECIAL SERVICES BOND COUNSEL


	QUALIFICATION OF STAFF		QUALIFICATION OF FIRM		TECHNICAL APPROACH		LOCATION		FEE PROPOSAL		M/WBE PARTICIPATION		DISPL. WORKER	SDV PRIME	SDV SUBS	TOTAL
WEIGHT:	20		20		20		10		20		10		5	5	10	
POINT STRUCTURE: 1= Poor 4= Above Avg. 2= Below Avg. 5= Excellent 3= Average	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	BONUS POINTS	BONUS POINTS	BONUS POINTS	
FIRM NAME:																
Greenberg Traurig P.A.	5.00	100.00	5.00	100.00	5.00	100.00	5.00	50.00	4.00	80.00		50.00	-	-	-	480.00
Nabors, Giblin & Nickerson P.A.	4.00	80.00	4.00	80.00	4.00	80.00	1.00	10.00	4.00	80.00		25.00	-	-	-	355.00



INTEROFFICE MEMORANDUM

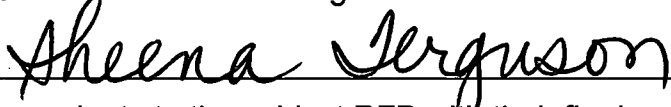
February 3, 2020

TO: Kathy Bozeman, Contracting Agent
Procurement Division

FROM: Kesi Warren, Senior Contract Administrator 
Business Development Division

SUBJECT: Business Development Division M/WBE Proposal Evaluation

PROJECT: Y20-186-KB / Financial Legal Counsel

APPROVED: 

Below are the respondents to the subject RFP with their firm's certified Minority/Women Business Enterprise (M/WBE) sub-consultants, Minority Business Enterprise Workforce and Women Business Enterprise goals:

- Greenberg Traurig P.A.
MAJORITY PRIME

M/WBE Sub-consultant(s)	M/WBE Classification	Projected %	Sub-consultants Role
Debi V Rumph McRae	AFAF	24%	Legal Services

Total M/WBE Participation Proposed: 24%
M/WBE Sub consultant participation Weighted Score: 25

Total M/WBE Workforce: 18%
 Total WBE Workforce: 31%
Minority Workforce and Women Workforce Weighted Score: 25

Total M/WBE Participation Weighted Score: 50

Registered Service-Disabled Veteran(s) (SDV) Sub-consultant	Points	SDV Sub-consultant Role
None		

Registered SDV(s) Proposed: 0
SDV Bonus Points: 0

Displaced Worker(s) Proposed: 0
Displaced Worker(s) Bonus Points: 0

Total Bonus Points: 0
(Includes SDV & Displaced workers)

2. Nabors, Giblin & Nickerson P.A.
 MAJORITY PRIME

M/WBE Sub-consultant(s)	M/WBE Classification	Projected %	Sub-consultants Role
Ruye H. Hawkins, P.A.	AFAM	25%	Legal Services

Total M/WBE Participation Proposed: 25%
 M/WBE Sub consultant participation Weighted Score: 25

Total M/WBE Workforce: 12%
 Total WBE Workforce: 32%
 Minority Workforce and Women Workforce Weighted Score: 0

Total M/WBE Participation Weighted Score: 25

Registered Service-Disabled Veteran(s) (SDV) Sub-consultant	Points	SDV Sub-consultant Role
None		

Registered SDV(s) Proposed: 0
SDV Bonus Points: 0

Displaced Worker(s) Proposed: 0
Displaced Worker(s) Bonus Points: 0

Total Bonus Points: 0
(Includes SDV & Displaced workers)

3. Watson Sloane PLLC
 MARJORITY PRIME

M/WBE Sub-consultant(s)	M/WBE Classification	Projected %	Sub-consultants Role
Anderson & Associates, P.A.	AFAF	25%	Drafting documents and assisting with the drafting and preparation of disclosure documents

Total M/WBE Participation Proposed: 25%
 M/WBE Sub consultant participation Weighted Score: 25

Total M/WBE Workforce: 30%
 Total WBE Workforce: 30%
 Minority Workforce and Women Workforce Weighted Score: 25

Total M/WBE Participation Weighted Score: 50

Registered Service-Disabled Veteran(s) (SDV) Sub-consultant	Points	SDV Sub-consultant Role
None		

*The Schedule of Sub-Contracting – SDV Participation and Letter of Intent Form was not Submitted with the proposal; Therefore, the evaluator cannot assess bonus points.

Registered SDV(s) Proposed: 0
SDV Bonus Points: 0

*Displaced Worker(s) Proposed: 0
Displaced Worker(s) Bonus Points: 0

*The Displaced Worker Form was not submitted with the proposal.
 Therefore, the evaluator cannot assess bonus points

Total Bonus Points: 0
(Includes SDV & Displaced workers)