

**CITY OF HALLANDALE BEACH, FLORIDA**  
**MEMORANDUM**

**DATE:** February 5, 2020

**TO:** Dr. Jeremy Earle, Assistant City Manager/CRA Executive Director  
Emil Lopez, Finance Director

**FROM:** Andrea Lues, Procurement Director *Andrea Lues*

**SUBJECT:** **Award Recommendation Memorandum RFP # FY 2019-2020-CRA001 CRA BANK LOAN**

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This project continues to be under a Cone of Silence. There is to be no communication with any of the Firms until the date and time of the Board of Directors meeting when the award or rejection of the solicitation will be made.

If you have any questions on any of the items below, please make sure you contact the Procurement Director immediately for clarification.

Reminder that the RFP stated that PFM Financial Advisors LLC. was the Firm hired to do the review of the proposals and provide the Community Redevelopment Agency (CRA) Executive Director a recommendation for award of a contract. The CRA's Counsel, Fox Rothchild LLP., would represent the CRA in the loan transaction.

Due to the size of the documents for this Project, a USB drive has been forwarded to you via interoffice mail with a copy of all the following documents:

1. PFM Financial Advisors LLC. Bank Loan Proposal Results and Recommendation.
2. PFM Financial Advisors LLC. Bank Loan RFP Summary.
3. Three (3) Proposals received in response to this RFP.
4. Award Recommendation Memorandum.
5. Addendum #1.
6. RFP document.
7. Non-Mandatory Pre-Proposal Conference Sign-In Sheet 1-13-2020.
8. City Clerks List of Firm's Proposing 1/28/2020.

**Duties and Responsibilities:**

The Project Manager and CRA Executive Director are responsible for preparing the agenda cover memo for recommendation of award to the Board of Directors. Contact the City Clerk if there are any questions about the agenda process. Prior to processing an agenda item for recommendation of award of contract please read in detail all the information in this memorandum which may impact the recommendation for award of contract. The Project Manager and the CRA Executive Director need to address, through the agenda cover memo, the possibility of not being able to negotiate a satisfactory contract with the recommended Firm for any reason.

**TO:** Jeremy Earle, CRA Executive Director/ACM  
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1. **Agenda Process:**

As part of the agenda process, provide the following items to the CRA Attorney for creation of the Resolution:

- a. Award Recommendation Memorandum
- b. Agenda Cover Memo addressing the various possible items as stated in this Memorandum
- c. RFP document
- d. PFM Financial Advisors LLC. Bank Loan Proposal Results and Recommendation.
- e. PFM Financial Advisors LLC. Bank Loan RFP Summary.
- f. PFM's Financial Advisors LLC. recommend Firm's Proposal which includes variances and legal proceedings. CRA Attorney must review and address all legal variances and legal proceedings to determine how negotiations would be affected. Further input from City Risk Manager and other City administrators may need to be sought to address any variances.

2. **Rejection of responses to the RFP:**

If the RFP is to be rejected, an agenda item must be prepared for the rejection. This is in accordance with Procurement Code Section 23-12, (4) Rejection of Bids.

3. **Attendance of recommended Firm(s) to the Board of Directors meeting:**

The Procurement Department will invite the recommended Firm(s) to the Board of Directors meeting **if requested** by the CRA Executive Director and/or the Project Manager. You **must** email the Procurement Director if the Firm(s) are to be invited and advise of the date of the Board of Directors meeting.

4. **Negotiation of Agreement:**

The Project Manager and the CRA Executive Director may proceed with contract negotiations after the Resolution for recommendation of award of contract has been executed. All insurance and bonding requirements, if any, must be in place prior to commencement of any services.

5. **Legal Proceedings Form:**

The Firm recommended for award Legal Proceedings Form must be reviewed by the CRA Attorney, the Project Manager and the CRA Executive Director. Ensure you have addressed and discussed and provided the CRA Attorney the legal proceedings form for the recommend Firm for the drafting of the Resolution.

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6. **Variance Form:**

The Variance Form for the recommended Firm must be reviewed by the Project Manager. Ensure you have addressed and discussed with the CRA Attorney before requesting recommendation for award through the Board of Directors.

7. **References:**

The recommended Firm's references were provided.

**Summary Information**

**Release Date of RFP: December 19, 2019**

The release notice for the RFP was sent via email to over ninety (90) vendors from the City's Vendor list. The RFP was also advertised in the Hallandale Beach Chamber of Commerce website, City's website, DEMANDSTAR website, and City and HBCRA Social Media pages. The RFP was also advertised through the Miami Minority Business Development Agency Business Center, the U.S. Small Business Administration, and the Broward County Community Relations and Outreach Section Office of Economic and Small Business Development.

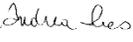
**Non-Mandatory Pre-Proposal Conference: was held on January 13, 2020 at 11:00 a.m.**

There was one (1) Firm in attendance at the Non-Mandatory Pre-Proposal Conference.

In addition to providing the opportunity for Firm's to come and ask questions during the Non-Mandatory Pre-Proposal Conference, the solicitation allowed for additional questions to be sent in via email by no later than **January 14, 2020 @ 11:00 a.m.**

**Due Date:** Responses to the RFP were due **January 28, 2020 @ 11:00 a.m.**

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**FROM:** Andrea Lues, Procurement Director 

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**Proposals Received:**

The following firms proposed for this RFP.

- Bank United, N.A.
- BB&T
- PNC Bank

The proposals were forwarded to PFM Financial Advisors LLC. as the Firm was hired to do the review of the proposals and to provide the CRA Executive Director a recommendation for award of a contract. The CRA's Counsel, Fox Rothchild LLP ("CRA Counsel"), represents the CRA in the loan transaction.

Cc: Steven Zelkowitz, CRA Attorney.

(Copy of all information as stated in this memorandum is being provided through a thumb drive via FedEx through City Attorney.)