



RFP TABULATION SHEET

BID NUMBER: RFP-604739-24/LAS
BID TITLE: Disclosure Counsel Services
OPENING DATE: July 10, 2024 at 2:00 P.M.

ALL BIDS ACCEPTED BY SEMINOLE COUNTY ARE SUBJECT TO THE COUNTY'S TERMS AND CONDITIONS AND ANY AND ALL ADDITIONAL TERMS AND CONDITIONS SUBMITTED BY THE BIDDERS ARE REJECTED AND SHALL HAVE NO FORCE AND EFFECT. BID DOCUMENTS FROM THE VENDORS LISTED HEREIN ARE THE ONLY BIDS RECEIVED TIMELY AS OF THE ABOVE OPENING DATE AND TIME. ALL OTHER BID DOCUMENTS SUBMITTED IN RESPONSE TO THIS SOLICITATION, IF ANY, ARE HEREBY REJECTED AS LATE.

Holland & Knight LLP 800 17 th Street N.W Suite 100 Washington, DC 20006 Andrew Blasko PH: 202-955-3000 Andrew.blasko@hklaw.com	Nabors, Giblin & Nickerson, P.A. 2502 N. Rocky Point Drive Suite 1060 Tampa, FL 33607 Eileen Gianfrancesco PH: 813-281-2222 egianfrancesco@ngn-tampa.com
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FACTORS FOR EVALUATION:

- Firm Experience & Capabilities– 25 points (25%)
- Qualifications & Experience of Key Personnel– 30 points (30%)
- Methodology & Approach to Work – 25points (25%)
- Fee Structure/ Price Proposal – 20 points (20%)

Tabulated by: Louis Straffi, Sr. Procurement Analyst

Recommendation/Intent to award to: Holland & Knight, LLP BCC Agenda Date: (Tentative) 9/27/2024

 8/20/24

Lorie Bailey Brown, CFO/Resource Management Director

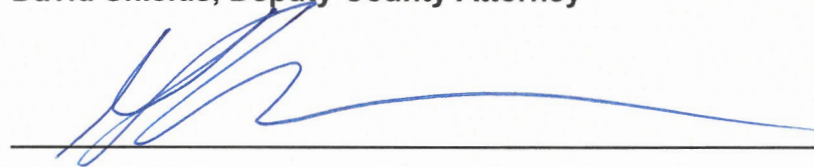
Jenny Spencer

Digitally signed by Jenny Spencer
Date: 2024.08.19 17:19:57 -04'00'

Jenny Spencer, Director- Comptroller's/Clerk's Office

 8/20/2024

David Shields, Deputy County Attorney



Gerlin Kahn, Assistant County Attorney



Seminole County
Resource Management - Purchasing & Contracts

Stephen Koontz, Purchasing and Contracts Manager
1301 East Second St., Sanford, FL 32771

AGGREGATE SCORES SUMMARY

Vendor	Lorie Bailey-Brown	Gerlin Kahn	David Shields	Jenny Spencer	Total Score (Max Score 100)
Holland & Knight LLP	100	100	96	100	99
Nabors, Giblin & Nickerson, P.A.	77.4	87.4	80.4	82.4	81.9

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Firm Experience & Capabilities Points Based 25 Points (25%)	Qualifications/Experience of Key Personnel Points Based 30 Points (30%)	Methodology/Approach to Work Points Based 25 Points (25%)	Fee Structure Points Based 20 Points (20%)	Total Score (Max Score 100)
Holland & Knight LLP	24.8	29.5	24.8	20	99
Nabors, Giblin & Nickerson, P.A.	21.5	27.5	20.5	12.4	81.9

INDIVIDUAL PROPOSAL SCORES

Holland & Knight LLP

Firm Experience & Capabilities | Points Based | 25 Points (25%)

Lorie Bailey-Brown: 25

The firm is very capable and experienced as a whole with experience with similar governmental agencies and relevant references.

Gerlin Kahn: 25

Valuable experience as this firm works with a multitude of other similar governmental agencies.

David Shields: 24

The capabilities, experience and expertise of the firm are vast. They seem well equipped to handle matters that may arise during a bond issue.

Jenny Spencer: 25

Holland & Knight LLP has extensive governmental experience and expertise in municipal bonds disclosures. They have been the County's Disclosure Counsel since 2001 and have a breadth of resources of attorneys on staff with various expertise from environmental related experience to Water and Sewer and Solid Waste experience. In addition, they have 272 attorneys with governmental expertise.

Qualifications/Experience of Key Personnel | Points Based | 30 Points (30%)

Lorie Bailey-Brown: 30

Attorney's assigned are competent with the appropriate background and training.

Gerlin Kahn: 30

Key personnel has the experience and expertise to handle this contract.

David Shields: 28

Michael Weiner has a proven track record of success in this field.

Jenny Spencer: 30

For the reasons stated above Holland & Knight has the experience and expertise needed to service the County. Mike Weiner has worked on the County's account since 2001.

Methodology/Approach to Work | Points Based | 25 Points (25%)

Lorie Bailey-Brown: 25

Methodology and approach were explained very clearly with training offered.

Gerlin Kahn: 25

They are very logical in their approach to the work.

David Shields: 24

The firm's methodology is highly organized and thorough as demonstrated by the firm's presentation.

Jenny Spencer: 25

Holland & Knight has institutional knowledge of Seminole County. Their methodology and approach to work was well presented in their presentation. They provided a 17 page presentation that listed the team members and the hypothetical scenario that the evaluation committee asked them to address for a potential issuance of Water and Sewer Revenue Bonds to finance a new water treatment facility. They discussed their approach with the County's refunding of the Water and Sewer Bonds in 2019. The Comptroller's Office and County staff have worked well with Holland & Knight. They are always responsive to questions. They review the County's annual Continuing Disclosure Report as well as reviewing the County's Post Issuance Monitoring Policies and Procedures. In addition, they keep the Clerk and County staff aware of any SEC rulings impacting Bond Issues. They conduct periodic training on municipal bonds.

Fee Structure | Points Based | 20 Points (20%)

Lorie Bailey-Brown: 20

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

Gerlin Kahn: 20

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

David Shields: 20

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

Jenny Spencer: 20

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

Nabors, Giblin & Nickerson, P.A.

Firm Experience & Capabilities | Points Based | 25 Points (25%)

Lorie Bailey-Brown: 20

Very capable and experienced firm as a whole with appropriate experience with similar governmental agencies

Gerlin Kahn: 24

I think its clear that this firm has done similar work across other governmental units.

David Shields: 22

This firm has impressive experience and expertise in the bond finance field.

Jenny Spencer: 20

Nabors, Giblin & Nickerson, P.A.'s (NGN) engagement team appeared to have the capabilities, experience and expertise in municipal bonds. It was difficult to assess if the clients they listed in their response were for Disclosure Services or Bond Counsel. NGN has worked with the County since 1985. They have served as Bond Counsel and helped develop various Bond Resolutions. It was difficult to assess their experience as it relates to Disclosure Counsel services. They have worked on multiple Bond Issues that are similar to some Bond Issues the County has previously issued.

Qualifications/Experience of Key Personnel | Points Based | 30 Points (30%)

Lorie Bailey-Brown: 25

Experienced attorneys assigned with expertise and educational background appropriate for the services.

Gerlin Kahn: 29

The attorneys have the experience and expertise.

David Shields: 26

The firm's bond finance attorneys appear knowledgeable in the bond finance field.

Jenny Spencer: 30

The engagement team that participated in the presentation or that were listed in the response to the RFP appeared to have the expertise and experience needed to service the County.

Methodology/Approach to Work | Points Based | 25 Points (25%)

Lorie Bailey-Brown: 20

Methodology and approach were discussed with a great training opportunity.

Gerlin Kahn: 22

Overall, the firm demonstrates a solid and well-structured methodology, in alignment with industry standards. That said, they appear lacking in distinctive innovative concepts that could set them apart. So while they provide a dependable and proficient service, the materials do not show an ability to provide creative and/or groundbreaking solutions. This is the main reason why I scored this firm lower.

David Shields: 20

Bond finance is a complex area of law that is not quickly understood by persons outside the field. The firm could have better explained their methodology by using and organized and structured PowerPoint in their presentation.

Jenny Spencer: 20

NGN's methodology and approach to work was not very cohesive as to how they would approach a project for Disclosure Services or the hypothetical scenario they were asked to address for the potential issuance of Water and Sewer Revenue Bonds to finance a new water treatment facility.

Fee Structure | Points Based | 20 Points (20%)

Lorie Bailey-Brown: 12.4

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

Gerlin Kahn: 12.4

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

David Shields: 12.4

EVALUATION TABULATION
RFP No. RFP-604739-24/LAS
Disclosure Counsel Services

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses

Jenny Spencer: 12.4

Proposed Individual Hourly Rates + Not to Exceed Reimbursable Expenses