

RFP No. 1269 - Arbitrage Compliance Services

Sr. Buyer - Roberta Ortiz

Proposal Evaluation	Arbitrage Compliance Specialists, Inc.	American Municipal Tax-Exempt Compliance (AMTEC)	Willdan Financial Services
Minimum Qualifications			
Must have operated continuously for a minimum of five years as an established firm in providing same service	Pass	Pass	Pass
No outstanding lawsuits during last 5 years or current litigation with the City during last 5 years	Pass	Pass	Pass
No outstanding regulatory issues last 5 years	Pass	Pass	Pass
References Provided for firm	Pass	Pass	Pass
Technical Proposal			
<i>Technical Proposal (35 points)</i>	32	28	25
Firms' Experience (15 points)			
Team Experience (10 points)			
Understanding of Project Scope (10 points)			
Interview			
<i>Interview (30 points)</i>	29	24	21
Firms' Experience (10 points)			
Team Identificaton (10 points)			
Understanding of Project Scope (10 points)			
Price	27	35	16
<i>Price (35 points)</i>			
Bonds (25 points)			
Assistance with IRS related issues (10 points)			
Total	88	87	62