



**DeKalb County
Department of Purchasing and Contracting**

ADDENDUM NO. 2

August 8, 2022

TO: ALL RESPONDERS UNDER REQUEST FOR PROPOSALS (RFP) NO. 22-500623

FROM: Department of Purchasing and Contracting, DeKalb County, Georgia
For additional information, go to:
<http://yourdekalb.com/purchasing/index.html>

SUBJECT: RFP NO.22-500623, “Financial Advisory Services” is hereby modified as follows:

- The following questions and respective answers are provided.

A.	Question:	Will an Executive Summary Cover Letter as an introduction to the response count against the page count in the Financial Advisor Methodology Section?
	Answer:	Yes
B.	Question:	Question 4a under Financial Advisor Methodology/can the MSRB certificate be placed in an appendix and not count towards page count?
	Answer:	Yes
C.	Question:	Question 5b under Expertise of Assigned Personnel/ can resumes be placed in an appendix and not count towards the page count?
	Answer:	No
D.	Question:	Question 5d and 5e under Expertise of Assigned Personnel/can the tabular form listing of type of security, new money or refunding etc... (this list can be extensive) be placed in an appendix and not count toward the page count?
	Answer:	A tabular list may be included in an appendix but only as support for the #s presented in the response. The period has been limited to 2017 forward.
E.	Question:	Question 5d and 5e under Expertise of Assigned Personnel request this tabular list dating back to 2010, the same date as the last RFP in 2015, was this the County’s intention or should it go back to 2017 for a five (5) year period?
	Answer:	Yes, 2017
F.	Question:	Question 6c under Firm References and Capacity to Serve – can the three years of company financials be placed in an appendix and not count towards the page count?
	Answer:	Pursuant to 6a (vs 6c above), yes.
G.	Question:	Under page 4 Section D can attachments B,C, D, E, F, G, H and I and any subsequent forms be placed in an appendix and not count towards page count?
	Answer:	Yes, may be placed in appendix
H.	Question:	Can the County provide the contract for 2015/2016 awarded to PFM for Financial Advisory services?
	Answer:	Yes
I.	Question:	Can the County provide the amounts paid to PFM from 2015 to 2018?

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	Answer:	Yes
J.	Question:	LSBE Requirement: This component is not specifically outlined in the Criteria for Evaluation (Section VII, PDF pf. 17), but Attachment H states that DeKalb County based LSBEs will receive 10 points in the initial evaluation of their response to any RFP (PDF pg. 50). Is this an additional 10 points on top of what is outlined in the Evaluation Criteria or is it part of one of the existing evaluation categories? Please clarify.
	Answer:	This will be an additional 10 points.
K.	Question:	First Source Job Ordinance: is it expected that this financial advisory contract will fall under the First Source Jobs Ordinance?
	Answer:	Yes.
L.	Question:	Under “Expertise of Assigned Personnel” (PDF pg. 15, #5 d/e), can we provide this information in a summarized tabular format? The amount of debt issuances we have worked on since 2010 is going to be well into the thousands and will far exceed the page requirement. We can include the detail as an appendix, if that is the County’s preference.
	Answer:	Amend to since 2017.
M.	Question:	Can you please provide an example of what type of report you are looking for in response to #8 under “F. Other” (PDF pg. 11)?
	Answer:	No standard format.
N.	Question:	Section IV – Firm Qualifications – A states that Proposers must provide a Certificate of Current MA Registration from the MSRB rules G-37 and G-38. Should this statement reference MSRB Series 50 & 54 Certifications? Rules G-37 and G-38 apply solely to broker-dealers, rather than Municipal Advisors.
	Answer:	Yes
O.	Question:	I missed the call on the LSBE. Does that mean I am out?
	Answer:	The County will accept all proposals, but in order for a proposal to be considered responsive and considered for award, the proposer must have attended at least one of the mandatory LSBE meetings.

2. All other conditions remain in full force and effect.
3. All Responders under this Request for Proposals must acknowledge receipt of this Addendum to be included in their response.

Cathryn Horner, Chief Procurement Officer
Department of Purchasing and Contracting



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ACKNOWLEDGEMENT

The above Addendum No. 1 is hereby acknowledged:

Company Name

Signature & Title

DR:bhr