

City of Franklin, Tennessee
Tabulation of Submittals*

Purchasing Office Solicitation No.:	2015-014 (non-discretionary investment advisory services for certain non-pension assets of the City)						
Notice to proposers published in the Williamson Herald on:	11/6/14						
Number of potential proposers that were notified of / that submitted a proposal in response to this request for proposals:	20 / 2						
Date and time proposal due and publicly opened:	12/9/14 2:00 PM						
Present at opening of proposals:	Brad Wilson of the City of Franklin Administration Department; and Dee Settle and Suzanne Ward of the City of Franklin Purchasing Office						
Target meeting of BOMA at which recommendation will be considered:	1/27/15						
Proposals received from:	Does the proposal include all required documents?	Does the proposal take any exceptions to the City's procurement solicitation? / If so, how many?	Average points allocated by proposal evaluation team (out of a possible 100, utilizing evaluation criteria as listed in RFP):	Total quoted proposal price, per year:	Payment terms:	Estimated time of completion of conversion / transition after notice of award:	Proposal is valid and may be accepted through:
Government Portfolio Advisors 2188 SW Park Place, Suite 100 Portland, OR 97205 Deanne Woodring, President 503/248-9973 deanne@gpafixedincome.com	Yes	Yes / 1 (limits of coverage for professional liability insurance)	90	\$25,000.00 <small>(based on average fund balance of \$35M with investment component of \$15M-\$20M)</small>	Net 30 days	30 days	4/30/2015
Patterson Capital Management Barton Oaks Plaza II 901 S. Mopac Expwy, Suite 195 Austin, TX 78746 Linda T. Patterson, President 800/817-2442 linda@patterson.net	Yes	None taken	87	\$35,000.00	Net 30 days	20-30 days	3/31/2015

* Shaded submittal is the submittal scored highest by the proposal evaluation team