



City of Port St. Lucie
Procurement Management Division
121 SW Port St. Lucie Blvd., Port St. Lucie, FL 34984

EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

RESPONSE DEADLINE: April 14, 2025 at 10:00 am

Report Generated: Wednesday, July 2, 2025

SELECTED VENDOR

VENDOR RECOMMENDED BY THE EVALUATION PROCESS

Vendor	Location
Burgess Chambers & Associates, Inc.	Orlando, FL

PHASE 3

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Phase 1 Total	Points Based	100 (90.9% of Total)

Description:

Criteria	Scoring Method	Weight (Points)
Phase 2 Total	Points Based	10 (9.1% of Total)

Description:

AGGREGATE SCORES SUMMARY

EVALUATION TABULATION

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Vendor	Evaluator 1	Total Score (Max Score 110)
Burgess Chambers & Associates, Inc.	102	101.95
OneDigital Investment Advisors LLC	100.7	100.71
Mariner Institutional, LLC	94.2	94.18
Bolton Partners, Inc.	0	0
Excluded		
CAPTRUST Financial Advisors	0	0
Excluded		
Dahab Associates, Inc.	0	0
Excluded		
Gallagher Fiduciary Advisors, LLC.	0	0
Excluded		
Innovest Portfolio Solutions LLC	0	0
Excluded		
SageView Advisory Group, LLC	0	0
Excluded		

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Phase 1 Total Points Based 100 Points (90.9%)	Phase 2 Total Points Based 10 Points (9.1%)	Total Score (Max Score 110)
Burgess Chambers & Associates, Inc.	93.5	8.5	101.95
OneDigital Investment Advisors LLC	92.4	8.3	100.71
Mariner Institutional, LLC	86.7	7.5	94.18
Bolton Partners, Inc.	0	0	0
Excluded			

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Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

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Vendor	Phase 1 Total Points Based 100 Points (90.9%)	Phase 2 Total Points Based 10 Points (9.1%)	Total Score (Max Score 110)
CAPTRUST Financial Advisors Excluded	0	0	0
Dahab Associates, Inc. Excluded	0	0	0
Gallagher Fiduciary Advisors, LLC. Excluded	0	0	0
Innovest Portfolio Solutions LLC Excluded	0	0	0
SageView Advisory Group, LLC Excluded	0	0	0

INDIVIDUAL PROPOSAL SCORES

Burgess Chambers & Associates, Inc.	
Phase 1 Total Points Based 100 Points (90.9%)	
Phase 1 Total	Evaluator 1: 93.45
Phase 2 Total Points Based 10 Points (9.1%)	
Phase 2 Total	Evaluator 1: 8.5
Mariner Institutional, LLC	

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Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 86.68

Phase 1 Total

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 7.5

Phase 2 Total

OneDigital Investment Advisors LLC

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 92.38

Phase 1 Total

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 8.33

Phase 2 Total

Bolton Partners, Inc.
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

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Evaluator 1: 0

CAPTRUST Financial Advisors
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Dahab Associates, Inc.
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Gallagher Fiduciary Advisors, LLC.
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

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Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Innovest Portfolio Solutions LLC
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 0

SageView Advisory Group, LLC
(Excluded)

Phase 1 Total | Points Based | 100 Points (90.9%)

Evaluator 1: 0

Phase 2 Total | Points Based | 10 Points (9.1%)

Evaluator 1: 0

PHASE 2

EVALUATION TABULATION

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Criteria	Scoring Method	Weight (Points)
Oral Presentation	Points Based	10 (100% of Total)

Description:

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Total Score (Max Score 10)
Burgess Chambers & Associates, Inc.	7	9.5	9	8.5
OneDigital Investment Advisors LLC	9	8	8	8.33
Mariner Institutional, LLC	8	7.5	7	7.5
Bolton Partners, Inc. Excluded	0	0	0	0
CAPTRUST Financial Advisors Excluded	0	0	0	0
Dahab Associates, Inc. Excluded	0	0	0	0
Gallagher Fiduciary Advisors, LLC. Excluded	0	0	0	0
Innovest Portfolio Solutions LLC Excluded	0	0	0	0

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Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Total Score (Max Score 10)
SageView Advisory Group, LLC	0	0	0	0
Excluded				

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Oral Presentation Points Based 10 Points (100%)	Total Score (Max Score 10)
Burgess Chambers & Associates, Inc.	8.5	8.5
OneDigital Investment Advisors LLC	8.3	8.33
Mariner Institutional, LLC	7.5	7.5
Bolton Partners, Inc.	0	0
Excluded		
CAPTRUST Financial Advisors	0	0
Excluded		
Dahab Associates, Inc.	0	0
Excluded		
Gallagher Fiduciary Advisors, LLC.	0	0
Excluded		
Innovest Portfolio Solutions LLC	0	0
Excluded		
SageView Advisory Group, LLC	0	0
Excluded		

INDIVIDUAL PROPOSAL SCORES

Burgess Chambers & Associates, Inc.

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 7

Meets exceeds all expectations. Consulting only. No training. No merged company.

Evaluator 2: 9.5

proven results as incumbent

Evaluator 3: 9

great presentation. I appreciated they spoke about their client retention and importance of regulatory and investment skillsets

Mariner Institutional, LLC

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 8

Meets exceeds all expectations. Consulting, mostly. Training on demand. Merged company.

Evaluator 2: 7.5

satisfactory presentation, large footprint

Evaluator 3: 7

good presentation. I felt they were a jack of all trades and did not specifically work on just governmental plans. I would prefer a vendor to work specifically with governments

OneDigital Investment Advisors LLC

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 9

Meets exceeds all expectations. Monthly education.

Evaluator 2: 8

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

good education programs and client list in Florida.

Evaluator 3: 8

I got a good feeling Ron and team had the specific governmental experience needed for us. Only concerns were that they may be too large to give us the attention needed

Bolton Partners, Inc.
(Excluded)

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

CAPTRUST Financial Advisors
(Excluded)

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

Dahab Associates, Inc.
(Excluded)

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Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

Gallagher Fiduciary Advisors, LLC.
(Excluded)

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

Innovest Portfolio Solutions LLC
(Excluded)

Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

SageView Advisory Group, LLC
(Excluded)

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Oral Presentation | Points Based | 10 Points (9.1%)

Evaluator 1: 0

Evaluator 2: 0

Evaluator 3: 0

PHASE 1

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Professional Qualifications of Firm	Points Based	30 (30% of Total)

Description:

Criteria	Scoring Method	Weight (Points)
Professional Qualifications of Individual Staff to be Assigned to the City	Points Based	15 (15% of Total)

Description:

Criteria	Scoring Method	Weight (Points)
Overall Cost to the City/Employees	Points Based	30 (30% of Total)

Description:

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Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Criteria	Scoring Method	Weight (Points)
Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients)	Points Based	20 (20% of Total)

Description:

Criteria	Scoring Method	Weight (Points)
Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie)	Points Based	5 (5% of Total)

Description:

Local = 5%, In Florida = 4%, Outside Florida = 0%

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Total Score (Max Score 100)
Burgess Chambers & Associates, Inc.	97	97	86.3	93.45
OneDigital Investment Advisors LLC	99	96	82.1	92.38
Mariner Institutional, LLC	93	85	82	86.68
Innovest Portfolio Solutions LLC	95	87	77.7	86.57

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Total Score (Max Score 100)
Dahab Associates, Inc.	91	75	83.5	83.17
Gallagher Fiduciary Advisors, LLC.	95	70	81.5	82.16
SageView Advisory Group, LLC	81	85	72.1	79.36
CAPTRUST Financial Advisors	82	70	60.9	70.97
Bolton Partners, Inc.	75	50	59.7	61.57

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Professional Qualifications of Firm Points Based 30 Points (30%)	Professional Qualifications of Individual Staff to be Assigned to the City Points Based 15 Points (15%)	Overall Cost to the City/Employees Points Based 30 Points (30%)	Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) Points Based 20 Points (20%)	Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) Points Based 5 Points (5%)	Total Score (Max Score 100)
Burgess Chambers & Associates, Inc.	29.4	14.3	25.7	20	4	93.45
OneDigital Investment Advisors LLC	29	13	26.3	20	4	92.38
Mariner Institutional, LLC	29	13.3	21	19.3	4	86.68
Innovest Portfolio Solutions LLC	28.2	13.3	28.3	12.7	4	86.57
Dahab Associates, Inc.	27.5	13.3	24	18.3	0	83.17

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Vendor	Professional Qualifications of Firm Points Based 30 Points (30%)	Professional Qualifications of Individual Staff to be Assigned to the City Points Based 15 Points (15%)	Overall Cost to the City/Employees Points Based 30 Points (30%)	Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) Points Based 20 Points (20%)	Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) Points Based 5 Points (5%)	Total Score (Max Score 100)
Gallagher Fiduciary Advisors, LLC.	25.2	12.3	26.3	18.3	0	82.16
SageView Advisory Group, LLC	23.1	13.6	25.3	13.3	4	79.36
CAPTRUST Financial Advisors	26.2	11.1	21.3	12.3	0	70.97
Bolton Partners, Inc.	24	11.5	16.7	9.3	0	61.57

INDIVIDUAL PROPOSAL SCORES

Bolton Partners, Inc.

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds the required criteria

Evaluator 2: 15

Proposal lacked explanation of qualifications.

Evaluator 3: 27.11

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Evaluator 1: 12

No local representatives' offices specified, as requested. Support team is highly qualified.

Evaluator 2: 10

Qualifications are satisfactory.

Evaluator 3: 12.6

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 20

Highest yearly fee of all submissions. Yearly fee increases after 3 yrs

Evaluator 2: 15

Proposal with highest cost.

Evaluator 3: 15

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 13

Only one local municipality client noted.

Evaluator 2: 10

Proposal did not elaborate on past experiences with government clients but included references.

Evaluator 3: 5

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 0

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Primary Location in Maryland

Evaluator 2: 0

Primary Location in Maryland

Evaluator 3: 0

Primary Location in Maryland

Burgess Chambers & Associates, Inc.

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 30

Specializes in Florida government retirement plans. Current Investment Consultant for the City. Serves over 70 public agencies in Florida.

Evaluator 3: 28.34

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required criteria

Evaluator 2: 15

Qualifications are satisfactory.

Evaluator 3: 13

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

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Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

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Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Evaluator 1: 28

Mid-to-Low end of fee scale

Evaluator 2: 28

Cost is satisfactory.

Evaluator 3: 21

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Previous service provided to PSL, as well as multiple other FL municipalities.

Evaluator 2: 20

Proposal included Letters of Recommendation and references from public agencies they serve.

Evaluator 3: 20

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 4

Primary Location In Orlando

Evaluator 2: 4

Primary Location In Orlando

Evaluator 3: 4

Primary Location In Orlando

CAPTRUST Financial Advisors

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Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 23

Qualifications are satisfactory. Proposal indicates they have serviced 197 public plans in the last five years, but didn't mention how many are Florida public agencies.

Evaluator 3: 25.5

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 10

No local office. Only two team members

Evaluator 2: 12

Qualifications are satisfactory.

Evaluator 3: 11.4

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 25

Mid-to-high level for fees

Evaluator 2: 20

Cost is satisfactory, but education for employees would be an additional cost for the CAPTRUST at Work services.

Evaluator 3: 19

backup emailed to Keith

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Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 17

No local references.

Evaluator 2: 15

Proposal did include case studies that provided insight to their past experiences. References were provided.

Evaluator 3: 5

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 0

Primary Location In North Carolina

Evaluator 2: 0

Primary Location In North Carolina

Evaluator 3: 0

Primary Location In North Carolina

Dahab Associates, Inc.

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 25

Professional qualifications are satisfactory. Currently serve 58 public funds, no mention of how many in Florida.

Evaluator 3: 27.5

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backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 13

Assigned team members' office locations are not specified. Presumably at the firm's office in NYC.

Evaluator 2: 12

Qualifications are satisfactory.

Evaluator 3: 15

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 28

Mid-to-Low end of scale.

Evaluator 2: 23

Cost is satisfactory.

Evaluator 3: 21

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Several FL municipalities served. High asset level.

Evaluator 2: 15

Proposal did not include past experiences with government clients but included references.

Evaluator 3: 20

backup emailed to Keith

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Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 0

Primary Location in New York

Evaluator 2: 0

Primary Location in New York

Evaluator 3: 0

Primary Location in New York

Gallagher Fiduciary Advisors, LLC.

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 20

Proposal lacked explanation of qualifications.

Evaluator 3: 25.49

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required needs

Evaluator 2: 12

Qualifications are satisfactory.

Evaluator 3: 10

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backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Low range for yearly fees

Evaluator 2: 23

Cost is satisfactory.

Evaluator 3: 26

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Several FL-based municipalities/govt-orgs

Evaluator 2: 15

Proposal did not include past experiences with government clients but included references.

Evaluator 3: 20

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 0

Primary Location in Illinois

Evaluator 2: 0

Primary Location in Illinois

Evaluator 3: 0

Primary Location in Illinois

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Innovest Portfolio Solutions LLC

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 28

Thorough proposal, professional qualifications are satisfactory. 81 public sector clients, 1 Florida client listed as of April 2025.

Evaluator 3: 26.7

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required needs

Evaluator 2: 13

Qualifications are satisfactory.

Evaluator 3: 12

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Lowest yearly fee rate of all vendors

Evaluator 2: 25

Proposal with the lowest price but includes an annual CPI adjustment.

Evaluator 3: 30

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backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 16

Public sector clients limited to Rocky Mnt and Pacific states. While they have a FL office, FL clients?

Evaluator 2: 17

Proposal included references and Letters of Recommendations that gave insight to their business operating model and relationships with clients.

Evaluator 3: 5

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 4

Primary Location Melbourne Florida

Evaluator 2: 4

Primary Location Melbourne Florida

Evaluator 3: 4

Primary Location Melbourne Florida

Mariner Institutional, LLC

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 30

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Proposal is thorough, and professional qualifications are satisfactory. Works with 60 public clients, 22 of which are located in Florida.

Evaluator 3: 27.13

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required needs

Evaluator 2: 13

Qualifications are satisfactory.

Evaluator 3: 11.9

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 24

Med-to-high range of yearly fee

Evaluator 2: 20

Cost is satisfactory. Does not provide additional education to employees.

Evaluator 3: 19

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Services various in-state municipalities

Evaluator 2: 18

Proposal included several references for clients located in Florida that have 401(a), 457(b) and OPEB plans.

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Evaluator 3: 20

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 4

Primary Location Winter Park Florida

Evaluator 2: 4

Primary Location Winter Park Florida

Evaluator 3: 4

Primary Location Winter Park Florida

OneDigital Investment Advisors LLC

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Meets or exceeds required criteria

Evaluator 2: 30

Proposal is thorough and professional qualifications are satisfactory. Has experience in Florida public sector plans. Currently works with 46 Florida public plans.

Evaluator 3: 27.13

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required needs

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Evaluator 2: 14

Qualifications are satisfactory.

Evaluator 3: 10

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

Evaluator 1: 30

Low end of yearly fee range

Evaluator 2: 28

Cost is satisfactory and includes a detailed employee education program through OneDigital's Financial Education & Guidance website at no additional cost.

Evaluator 3: 21

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Vendor provides its services to various in-state municipalities.

Evaluator 2: 20

Proposal included references and an example of a case study that provided insight to their business operations and client relationships.

Evaluator 3: 20

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 4

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Primary Location Tampa Florida

Evaluator 2: 4

Primary Location Tampa Florida

Evaluator 3: 4

Primary Location Tampa Florida

SageView Advisory Group, LLC

Professional Qualifications of Firm | Points Based | 30 Points (27.3%)

Evaluator 1: 15

Meets or exceeds required criteria. Sample report not provided.

Evaluator 2: 25

Proposal and professional qualifications are satisfactory. They serve 154 public sector plans, no indication of how many in Florida.

Evaluator 3: 29.18

backup emailed to Keith

Professional Qualifications of Individual Staff to be Assigned to the City | Points Based | 15 Points (13.6%)

Evaluator 1: 15

Meets or exceeds required needs

Evaluator 2: 13

Qualifications are satisfactory.

Evaluator 3: 12.9

backup emailed to Keith

Overall Cost to the City/Employees | Points Based | 30 Points (27.3%)

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

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EVALUATION TABULATION

RFP No. 20240083

Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)

Evaluator 1: 27

Mid range of yearly service fees

Evaluator 2: 28

Cost is satisfactory and includes employee education through their PersonalSAGE program at no additional cost.

Evaluator 3: 21

backup emailed to Keith

Past Experience, References, Existing Contracts with Similar Scope of Services (Government Clients) | Points Based | 20 Points (18.2%)

Evaluator 1: 20

Vendor provides consulting service to various in-state municipalities.

Evaluator 2: 15

Proposal does not include past experiences with public clients but includes references.

Evaluator 3: 5

backup emailed to Keith

Location of Primary Firm (Bidder must hold a business tax receipt required by the City of Port St. Lucie) | Points Based | 5 Points (4.5%)

Evaluator 1: 4

Primary Location West Palm Beach

Evaluator 2: 4

Primary Location West Palm Beach

Evaluator 3: 4

Primary Location West Palm Beach

EVALUATION TABULATION

Request For Proposal (RFP) - Retirement Plan Consulting Services (Investment Performance Monitoring and Advisory Services for 401A, 457B, RHS, and OPEB)