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DEPARTMENT OF
FINANCE

BUDGET DIVISION

CITY OF SACRAMENTO
CALIFORNIA

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January 22, 1990

Budget and Finance and Transportation
& Community Development Committee
Sacramento, California

Honorable Members in Session:

SUBJECT: Selection of Finalists to Provide Asset Management
Consulting Services

SUMMARY

A nine-member committee evaluating the proposals for asset management consulting services has narrowed the original field of 14 firms to four finalists. The firms selected to continue in the selection process, and make an oral presentation to the evaluation committee are Kosmont & Associates, Kotin, Regan, & Mouchly, Deloitte & Touche, and Williams - Kuebelbeck & Associates.

BACKGROUND

The 1989-90 Capital Improvement Program included \$150,000 for an Asset Management Study. This project was established to develop a system to manage under-utilized real estate assets of the City. The objective of the program would be to finance a portion of the City's unmet facility needs.

The City issued an RFP for this service September 1990. A pre-bid conference was held on October 25, 1990 that was attended by 18 individuals representing 17 firms. On the due date for submittal (November 20, 1990) the City received 14 proposals. This was viewed as a very good response by staff since the last RFP for this service only produced one proposal.

The submissions were from the following firms (included in parentheses is the level of participation of MBE/WBE firms):

Arthur Anderson (0%)
Caine, Gressel, Midgley, & Slater (0%)
Connell & Associate and Ernst & Young (50%)
Coopers & Lybrand (0%)
*Deloitte & Touche (5%)
Kenneth Leventhal & Associates (0%)
*Kosmont & Associates (100%)
*Kotin, Regan & Mouchly (20%)
Morgan Associates (40%)
Newport Resources Management (0%)
Portfolio Realty Advisors (15%)
Ralph Anderson and Keyser Marston (0%)
Wedin Enterprises (10%)
*Williams-Kuebelbeck (0%)

* Indicates Finalists

The RFP identified the criteria that would be used in evaluating the proposals. The criteria and the assigned weight or priority is as follows:

1. Experience in Asset Management Programs (10%)
2. General Experience of the Firm or Team (30%)
3. Evaluation of Scope of Services (20%)
4. Quality of past performances as supported by references(30%)
5. Consistency of proposal with City objectives (10%)

The finalists were chosen by an evaluation committee comprised of representatives from 9 different departments and offices (including Mayor/Council, Treasury, and City Manager). The selection was based on evaluation of the first two criteria. The evaluation committee is now focusing on the remainder of the criteria as it relates to the proposals submitted by the finalists.

The oral presentations and interviews will be conducted on February 1, 1990. A recommendation on the award of contract will be presented to Committee and Council in late February or early March.

FINANCIAL DATA

This report is for information only. There are no fiscal impacts at this time.

POLICY CONSIDERATIONS

This report is for information only. There are no policy considerations at this time.

MBE/WBE EFFORTS

Special notification of the RFP was sent to 24 MBE/WBE firms listed with the City's purchasing division that provide services associated with an asset management program.

The minimum participation levels (percentage of proposed contract) of MBE/WBE firms identified in the 14 proposals that were submitted is detailed below:

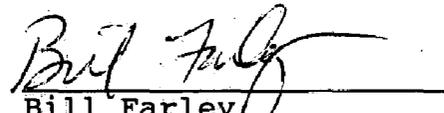
Participation Level	Number of Proposals	
100%	1	(This firm is a MBE)
50%	1	
30%	1	
20%	1	
15%	1	
10%	2	
0%	7	

Among the firms that remain in the competition, three of the four have some level of participation from MBE/WBE firms.

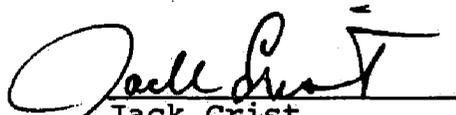
RECOMMENDATION

This report is for information only, No action is required by the Committee.

Respectfully submitted,


Bill Farley
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Approved for Committee Information:


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January 29, 1991