

# PEACE RIVER MANASOTA REGIONAL WATER SUPPLY AUTHORITY

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Hon. Elton A. Langford  
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Hon. Bill Truex  
Charlotte County

Hon. George Kruse  
Manatee County

Mike Coates, P.G., Executive Director

DATE: December 13, 2021

TO: Ann Lee, Finance & Budget Sr. Manager

FROM: Mike Coates, Executive Director

RE: Notice of Shortlisting and Invitation to Interview regarding the Financial Advisory Services Request for Proposals

In accordance with the Authority's Procurement Policy Section 5.4.3(b), the Professional Services Evaluation Committee (PSEC) met on December 13, 2021 to review the Proposals submitted for the Financial Advisory Services RFP.

It is the discretion of the PSEC to proceed with formal interviews of the firms, and the PSEC elected to proceed with formal interviews of the top two (2) ranked firms, PFM Financial Advisors (PFM) and Public Resources Advisory Group (PRAG). The interviews will be held at the Authority Administrative Offices, 9415 Town Center Parkway, Lakewood Ranch, FL on Monday, January 10, 2022. The public meeting will convene at 9:30 am with interviews conducted at the following times:

- PFM. – 9:45 am
- PRAG – 10:15 am

It is noted that rankings from the short list meeting will not be carried over to the formal interview process and that firms are presenting in alphabetical order only. The interview will allow for a 20-minute presentation by each firm and 10 minutes allotted for questions and answer between the PSEC members and the firm. Firms are requested to bring at least one printed copy of their presentation for inclusion into the record documents.

The Authority has audio visual equipment and resources available for use during the presentations. Any firm wishing to assess the compatibility of their presentation equipment shall contact Ms. Rachel Kersten at [RKersten@regionalwater.org](mailto:RKersten@regionalwater.org) to schedule a date and time.

Any requests for additional information must be presented in writing via e-mail to Marisol Garcia at [mgarcia@regionalwater.org](mailto:mgarcia@regionalwater.org) no later than 5:00 p.m. Eastern Standard Time on December 28, 2021. Consultants are responsible to review the Authority's website for the Authority's responses to any questions timely submitted.