

From: Billy, Kyle
Sent: Wednesday, February 21, 2018 6:32 PM
To: CM
Cc: Taylor, Kim; Peterson, Phillip; Parks, Brian; Pease, Gregory; Greive, Patrick; Mousa, Sam; Weinstein, Michael
Subject: COJ - Strat Init Fin Advisory RFP_FINAL.12.20.17.pdf
Attachments: COJ - Strat Init Fin Advisory RFP_FINAL.12.20.17.pdf; ATT00001.txt

Good Evening,

I am emailing you at the request of the Council President. Attached is an RFP prepared by PFM in Orlando at the request of the City Finance Department. The RFP appears to request Financial Advisory Services that would be needed to solicit bids to purchase JEA, evaluate those bids, assist City staff in negotiations, and assist in bringing the transaction to financial and commercial close. I received this document from a retired JEA employee, who received it from another retired JEA employee. I thought it was unusual because it appears to be a City of Jacksonville RFP, but the responses were not coming to the City. The responses were to be returned to PFM. I did not remember seeing it on any of the City awards committee agendas so I tried to find it on the Procurement website in order to verify that it was legitimate. I was unable to find it on the Procurement website, so this afternoon, I called Procurement Chief Greg Pease and asked him about it. Mr. Pease was not familiar with it and asked if I could email it to him. When he saw it, he said that it did not come out of his shop. I stated that I was going to call PFM and ask about it and Mr. Pease asked if I would let him know what I found out. I then contacted Jeremy Niedfeldt of PFM in Orlando, who is listed as the contact for the RFP. I asked Mr. Niedfeldt several questions. The answers are that the City of Jacksonville Finance Department asked him to prepare the RFP and that he had received seven responses. I asked if the Finance Department already had the responses and he acknowledged that they did. He emailed the responses to me. I will forward them to you in a separate email following this one. After speaking to Mr. Niedfeldt, I called Mr. Pease who had been in touch with Joey Greive. Mr. Pease stated that Municipal Code Section 126.313 allows the Finance Department to make such procurements without going through City Procurement.

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