

Tax Reform Consultant Services
Summary of Response to RFP

Evaluation Criteria:

<p>Directly Related Experience:</p>	<ul style="list-style-type: none"> • <u>State of Hawaii Tax Review Commission</u>: 2017, Study of state tax issues related to tax burden, regressivity and alternatives to the current structure; • <u>State of Oklahoma Incentive Evaluation Commission</u>: 2016-2017, Support of Commission responsible for evaluation of all state business tax incentives; • <u>St. Louis Development Corporation</u>: 2015, review and analysis of economic development incentives available to encourage growth within the city; • See also more detail regarding 3 comparable contracts (listed above) beginning on p. 20 of proposal; • Listing of Contracts to Supply Tax Reform Consulting Services, p. 7 of proposal; • See Work Samples provided (attached to proposal).
<p>Price:</p>	<p>See attached Official Proposal Price Sheet and Price Comparison Table. <u>Total Max Bid</u>: \$312,750</p>
<p>Plan/Schedule:</p>	<p><u>Plan</u>:</p> <ul style="list-style-type: none"> • Initial determination through discussions with TF members regarding “measures of success” for the TF; • Proposes weekly calls with the chairs; • Rolling “to-do” list of projects; • Bi-weekly written reports to the TF; • Stipulates that it will meet the December 2017 deadline for the TF’s preliminary report and September 1, 2018 final report deadline. <p><u>Schedule</u>:</p> <ul style="list-style-type: none"> • Suggested scheduling information on p. 10 of proposal only goes through November 2017, but states that further timeline will be developed “as the project unfolds.” • See Executive Summary, pp. 9-10 of proposal. • See also, “Project Methodology”/”Plan to Assist the Task Force” at pp. 18-19 of proposal.

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<p>Availability:</p>	<ul style="list-style-type: none"> • No more than five (5) business days from signing of the contract, p. 20 of proposal.
<p>Personnel:</p>	<ul style="list-style-type: none"> • Michael Nadol, PFM Managing Director, serving as Engagement Director for the project; • Randall Bauer, PFM Director, serving as day-to-day project manager for the project; • See Personnel Listing and Organizational Chart, pp. 11-18 of proposal. • Also states that personnel will be modified “as needed to keep the project on track”, p. 10 of proposal.
<p>Past Performance:</p>	<ul style="list-style-type: none"> • See Listing of State and Local Government Clients, pp. 4-7 of proposal (bolded items considered relevant to work needed under RFP) • See also examples of similar state projects, pp. 8-9 and pp. 16-17 of proposal, and “Similar Services over the past 3 years” at p. 26. • See Also information regarding PFM Case Studies and Vendor References, pp. 22-25 and attached References Table.
<p>Compliance with RFP Requirements:</p>	<p>See Attached Checklist</p>
<p>Subcontractors:</p>	<p>Three (3) listed subcontractors:</p> <ul style="list-style-type: none"> • <u>John Cape</u>, subject matter expert – recently retired PFM Partner, national expert on public sector budgets and tax policy, pp. 12-13 of proposal; • <u>Andrew Sidamon-Eristoff</u>, key subject matter expert – former Treasurer of State for New Jersey, Tax Commissioner for the State of New York, and Finance Commissioner for New York City, p. 13 of proposal; and • <u>TXP, Inc.</u> will be responsible for all economic impact modeling and general involvement on tax issues. TXP, Inc. is an economic analysis and public policy consulting firm, pp. 13-14 of proposal. • See also Subcontractor Identification at pp. 27-28 of proposal.