

**City of Lake Worth Beach**  
Evaluation Matrix

**RFP 21-204 Banking Services**

		RANKED:	4	1	5	3	2
<b>Evaluation Criteria Score Sheet:</b>		<b>Weight</b>	<b>BANK UNITED</b>	<b>JP MORGAN CHASE BANK, N.A.</b>	<b>TD BANK</b>	<b>PNC BANK N.A.</b>	<b>WELLS FARGO BANK N.A.</b>
1	<b>Responsiveness to RFP</b> 1. Comprehensiveness of proposal 2. Completeness of proposal 3. All information is provided and questions answered as requested in Exhibit A 4. Inventiveness of proposal and solutions offered to the City	<b>30</b>	105	111	105	110	114
2	<b>Cost Effectiveness</b> 1. Bank fees offered are comprehensive and provide information as described in RFP and all prices provided	<b>20</b>	73	70	69	67	67
3	<b>Successful Experience and Qualification</b> Experience with similar sized cities/public entities 1. Qualifications and subject knowledge 2. Evidence of experience and skill 3. Evidence of availability to deliver in the timeline 4. Successful past projects with the Government Entities	<b>25</b>	88	93	87	91	93
4	<b>Similar Projects and References</b> 1. Prior experience with three (3) similar projects, preferably government entities in the State of Florida 2. References from at least (3) entities for similar projects or work	<b>20</b>	73	78	73	76	78
5	<b>Default, Termination, Litigation, Debarment, etc.</b> 1. Instances of a default under a similar project or contract; 2. Instances of litigation related to a similar project or contract; 3. Instances of any debarment by a local, state or federal governmental entity (No instances of default and litigations scores maximum points of 5, provided instances shall score accordingly )	<b>5</b>	19	19	19	19	12
<b>Total Points Received:</b>			<b>358</b>	<b>371</b>	<b>353</b>	<b>363</b>	<b>364</b>
Exhibit "B" - City's Campaign Contribution Statement			submitted	submitted	submitted	submitted	submitted
Exhibit "C" - Respondant Information Form			submitted	submitted	submitted	submitted	submitted
Exhibit "D" - Similar Projects			submitted	submitted	submitted	submitted	submitted
Exhibit "E" - References			submitted	submitted	submitted	submitted	submitted
Exhibit "F" - Drug Free Workplace Form			submitted	submitted	submitted	submitted	submitted
Exhibit "G" - Scrutinized Companies Certification			submitted	submitted	submitted	submitted	submitted
default, termination, litigation statement			5- pg.34	5-pg.141	5- pg.72	5- pg. 13	5 - pg. 21