



June 23, 2021

**RE: Request for Proposals (RFP)
2021-RM1-25 - Advisory and Investment Consulting Services for Miami Dade
College's Endowment and Operating Surplus Funds**

On June 23, 2021 at 9:00am, the Evaluation Committee convened in a public Evaluation Committee Meeting whereby they discussed and ranked all ten (10) proposals related Request for Proposals (RFP) 2021-RM1-25 for Advisory and Investment Consulting Services for Miami Dade College's Endowment and Operating Surplus Funds.

The following is the ranking of all ten (10) proposals listed in ranking order:

- **CBIZ Investment Advisory Services LLC**
- **Meketa Investment Group**
- **FEG Investing Advisors**
- BNY Mellon Wealth Management
- PFM Asset Management LLC
- Callan, LLC
- Marquette Associates, Inc.
- AndCo Consulting
- CAPTrust
- Graystone Consulting, a business of Morgan Stanley

Upon completion of the ranking by the Committee, they unanimously agreed to invite the top three ranked proposers to a Presentation/Q&A Session. All scheduled Presentation and additional Evaluation Committee Meeting(s) will be posted on the College's Purchasing website under "Bid Postings" under "Public Announcements" and, under the "Communications" tab in BidNet.

Any Vendor, or any persons or entities acting on the behalf of any Vendor, may not contact the College President, any College Trustee, College Foundation or its Board members, any employee of the College or any employee of any College Trustee concerning any aspect of a Solicitation, from the release of the Solicitation through the end of the 72-hour period, as provided for in section 120.57(3), Fla. Stat., following the action on the recommended award by the College's District Board of Trustees.

Except as otherwise specifically provided for by the Solicitation, all communications to the College concerning any aspect of the Solicitation during the foregoing time period must be made in writing and only to the College's assigned Purchasing Department officer or the College's Office of Legal Affairs. It is the responsibility of the Vendor to advise any person or entity authorized to act on its behalf of this requirement. A violation of this provision shall be grounds for rejecting a response.

This provision shall be referred to as the "Cone of Silence".

Any questions related to the RFP procurement process shall be addressed to:

Roman Martinez, MPA, CPPO, CPPB

Group Director - Purchasing

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