



June 8, 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 7, 2021 at 3:00pm, the College Purchasing Department received electronic proposal responses related to Request for Proposals (RFP) 2021-RM1-25 for Advisory and Investment Consulting Services for Miami Dade College's Endowment and Operating Surplus Funds.

Proposals were received from the following ten (10) proposers related to the above aforementioned RFP, they are listed in alphabetical order:

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

The Purchasing Department is presently reviewing the proposals received. Upon completing Purchasing's initial evaluation, all responsive and responsible proposals will be provided to the Evaluation Committee for their review, ranking and final recommendation. All scheduled 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.

The public will be provided the opportunity to view the evaluation meetings via Zoom, more information will be provided and posted on the College's Purchasing under Bid Postings and on BidNet under the "Communications" tab.

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

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