

ATTACHMENT A

City of Pasadena
Department of Finance
Evaluation of Presentations for Tax Revenue Consulting for
Sales / Use Tax, Property and Transfer Tax Services

Proposer: Hinderliter, de Llamas and Associates & HdL Coren & Cone

Evaluation Criteria	Consultant Proposal / Presentation				
	Max	MH	VE	ED	Avg.
1 Project Understanding	15	15	15	14	
2 Project Approach	25	25	25	24	
3 Staffing of Project / Ability to Perform	15	15	15	14	
4 Experience	15	15	15	14	
5 Best Value / Cost Effectiveness	20	17	20	19	
6 Local Pasadena Business Preference	5	0	0	0	
7 Small / Micro-Business Preference	5	2.5	2.5	2.5	
Score	100	89.5	92.5	87.5	89.83

Proposer: MuniServices, LLC

Evaluation Criteria	Consultant Proposal / Presentation				
	Max	MH	VE	ED	Avg.
1 Project Understanding	15	15	15	14	
2 Project Approach	25	22	25	23	
3 Staffing of Project / Ability to Perform	15	13	10	14	
4 Experience	15	15	15	14	
5 Best Value / Cost Effectiveness	20	19	15	19	
6 Local Pasadena Business Preference	5	0	0	0	
7 Small / Micro-Business Preference	5	0	0	0	
Score	100	84	80	84	82.67

Attachment B

**Disclosure Pursuant to the
City of Pasadena Taxpayer Protection Amendment**

Pasadena City Charter, Article XVII

Contractor/Organization hereby discloses its trustees, directors, partners, officers, and those with more than 10% equity, participation, or revenue interest in Contractor/Organization, as follows:
(if printing, please print legibly. Use additional sheets as necessary.)

1. Contractor/Organization Name: Hinderliter, de Llamas and Associates
2. Type of Entity: <input checked="" type="checkbox"/> non-government <input type="checkbox"/> nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

Board of Directors: Robert Hinderliter, Secretary
Lloyd de Llamas, Executive Director
Andrew Nickerson, President
Brice Russell, Principal

Officers: Andrew Nickerson, President
Robert Hinderliter, Secretary
Jeffrey Schmehr, CFO

**4. Names of those with more than a 10% equity, participation or revenue interest
in
Contractor/Organization:**

ESOT - 100% Employee Stock Ownership Trust

Prepared by: Peggy Fickett
Title: Administrative Assistant
Phone: 909.861.4335
Date: 9/22/16

Attachment C

Disclosure Pursuant to the
City of Pasadena Taxpayer Protection Amendment

Pasadena City Charter, Article XVII

Contractor/Organization hereby discloses its trustees, directors, partners, officers, and those with more than 10% equity, participation, or revenue interest in Contractor/Organization, as follows:
(if printing, please print legibly. Use additional sheets as necessary.)

1. Contractor/Organization Name: HdL Coren & Cone
2. Type of Entity: <input checked="" type="checkbox"/> non-government <input type="checkbox"/> nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

Paula Cone, Martin Coren, David Schey, Nichole Cone, Robert Scherer

4. Names of those with more than a 10% equity, participation or revenue interest
in

Contractor/Organization: Paula Cone and Martin Coren

Prepared by: Nichole Cone

Title: Secretary

Phone: (909) 861-4335

Date: September 19, 2016