



CITY OF ORLANDO

June 30, 2015

MEMORANDUM

TO: David Billingsley, Chief Procurement Officer

FROM: Karen Elzy, Senior Purchasing Agent

SUBJECT: RFP15-0193, General Banking Services

Please review / approve the attached Meeting Minutes for the subject Advisory Committee Meeting of June 10, 2015.

Approved:

A handwritten signature in black ink, appearing to be "K. Elzy", written over a horizontal line.

PROCUREMENT AND CONTRACTS DIVISION

CITY HALL • 400 SOUTH ORANGE AVENUE • P.O. BOX 4990 • ORLANDO, FLORIDA 32802-4990
PHONE 407.246.2291 • FAX 407.246.2869 • CityofOrlando.net • esupplier.cityoforlando.net

ADVISORY COMMITTEE MEETING MINUTES
RFP15-0193
for
General Banking Services
Wednesday, June 10, 2015
4th Floor, Marlin/Tarpon Conference Rooms
8:30 AM

4th Meeting of the Advisory Committee to hear presentations from three (3) respondents for RFP15-0193 and review, score, and rank each of those firms.

Committee Members Present:

Michelle McCrimmon, Chair, Accounting Operations and Control
Chris McCullion, Office of Business and Financial Services (arrived 2:05 p.m.)
Imtiaz "Fazie" Khan, Accounting Operations and Control
Katrina Laudeman, Treasury Administration
Pam Corbin, Parking Division

Committee Members Absent:

None

Other City Personnel Present:

Karen Elzy, Senior Purchasing Agent, Procurement and Contracts Division (Facilitator)
Dawn Chin Shue, Minority/Women Business Enterprise
Laurie Nossair, Accounting Operations and Control

Actions/Discussion/Motions:

Karen Elzy, Purchasing Agent, called the meeting to order at 8:00 a.m. and took the following actions:

- A. Advised that the meeting was being recorded.
- B. Indicated the date, time and purpose of the meeting and that it was posted by the City Clerk more than forty-eight (48) hours in advance.
- C. Advised the Committee that a quorum was established.
- D. There were no members of the public present throughout the meeting.

Karen Elzy advised each presenter that they would be given sixty (60) minutes total, forty-five (45) minutes for a presentation followed by a fifteen (15) minute question and answer period.

Presentation Schedule of Firms:

<u>Time</u>	<u>Company</u>	<u>Meeting Room</u>
8:30 – 9:30 a.m.	JPMorgan Chase Bank, N.A.	Tarpon Conference Room
9:45 – 10:45 a.m.	SunTrust Bank	Marlin Conference Room
11:00 a.m. – 12:00 p.m.	Wells Fargo Bank, N.A.	Tarpon Conference Room

A forty (40) minute break was taken. The meeting reconvened at 12:40 p.m.

Actions/Discussion/Motions:

A motion was made by Chris McCullion, seconded by Katrina Laudeman, to accept the minutes of the 2nd Committee Meeting on May 26, 2015 as presented. Discussion ensued. Motion carried unanimously.

Karen Elzy distributed to the Committee a Client References Recap for their review. General discussion ensued.

The Committee discussed the presentations and proposals. Discussion ensued. Committee members individually scored. The resulting Final Ranking is as follows:

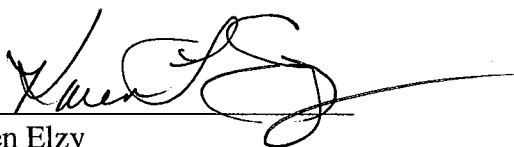
1. Bank of America, N.A.
2. J.P. Morgan Chase Bank, N.A.
3. SunTrust Bank, Inc.
4. Wells Fargo Bank, N.A.
5. BB&T Corporation
6. BankUnited, N.A.

A motion was made by Michelle McCrimmon, seconded by Pam Corbin, to accept the ranking and evaluation of the Proposals, and recommend to City Council that the Chief Procurement Officer negotiate a contract with the top ranked firm until successful, and if unsuccessful, negotiate with the next ranked firm until successful. Discussion ensued. The motion passed unanimously.

The Meeting was adjourned at 2:35 p.m.

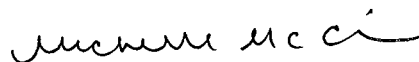
These minutes are considered to be the official minutes of the RFP15-0193 Committee Meeting held on June 10, 2015, and no other notes, tapes, or other recordings taken by anyone takes precedence.

Submitted by:



Karen Elzy
Procurement & Contracts Division
Assigned Procurement Representative

Reviewed and Accepted by:



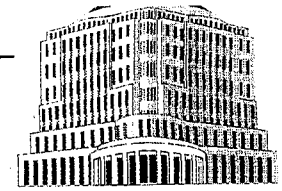
Michelle McCrimmon
Accounting Operations and Control
Chair

Attachment(s): Sign-in Sheets

CITY OF ORLANDO

Procurement and Contracts Division

Presentation Sign-In Sheet – JPMorgan Chase Bank, N.A.



Date: 6/10/15	Time: 8:30 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

COMPANY NAME AND ADDRESS DEPARTMENT/BLDG	COMPANY REPRESENTATIVE (PLEASE PRINT, LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: <u>IMPORTANT</u> (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
Procurement & Contracts Div. 400 South Orange Avenue, 4 th Floor Orlando, Florida 32801	Karen Elzy, Senior Purchasing Agent	<u>Karen.Elzy@cityoforlando.net</u>	(407) 246-2368	(407) 246-2869
City of Orlando, Business & Financial Services	Michelle McCrimmon, Chair <i>Michelle McCrimmon</i>	michelle.mccrimmon@cityoforlando.net	X2142	
JP MORGAN	Scott Ricker <i>Scott Ricker</i>	Scott.Ricker@JPMORGAN.COM	(407) 236-5398	
J.P. Morgan	Joseph Schaefer <i>Joseph Schaefer</i>	Joseph.h.schaefer@jpmorgan.com	(813) 488-8248	
J.P. MORGAN	DAVID FLESHEL <i>David Fleshel</i>	DAVID.FLESHEL@JPMORGAN.COM	(631) 755-5004	

PROCUREMENT AND CONTRACTS DIVISION

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Presentation Sign-In Sheet – JPMorgan Chase Bank, N.A.



Date: 6/10/15	Time: 8:30 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

COMPANY NAME & ADDRESS DEPARTMENT/BUREAU	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: IMPORTANT (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
J.P. Morgan	Sandra Watkins <i>Sandra Watkins</i>	Sandra.g.watkins@JPmorgan.com	407-236-5462	
J.P. Morgan	Michael Diaz <i>[Signature]</i>	Michael.Diaz@JPmorgan.com	813-432-2609	
JP Morgan	Robert H. Karstenbaum <i>[Signature]</i>	Bob.h.karstenbaum@jpmchase.com	407-236-5407	
Orlando	KATRINA LANDERMAN <i>Katrina Landerman</i>	katrina.landerman@cityoforlando.net	2685	
City of Orlando	RAMELA GERRIN <i>Ramela Gerrin</i>			

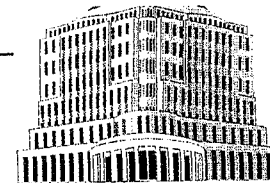
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Title: GENERAL BANKING SERVICES

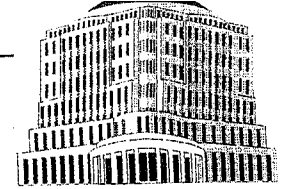
COMPANY NAME & ADDRESS DEPARTMENT/BUREAU	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: <u>IMPORTANT</u> (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
OBFS	LAURIE NOSSAIR <i>Laurie Nossair</i>	laurie.nossair@cityof orlando.net	407246- 2574	
OBFS	Fazie Khan <i>Fazie Khan</i>		2562	
MBE	DAWN CHIN SINGH <i>Dawn Chin Singh</i>			
OBFS	CHARIS MCCULLION <i>Charis McCullion</i>			

PROCUREMENT AND CONTRACTS DIVISION

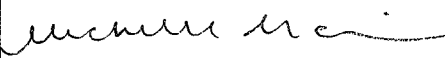

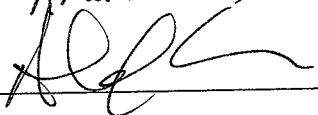
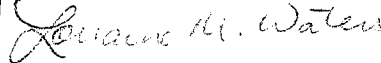
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Procurement and Contracts Division Presentation Sign-In Sheet – SunTrust Bank



Date: 6/10/15	Time: 9:45 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Marlin Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

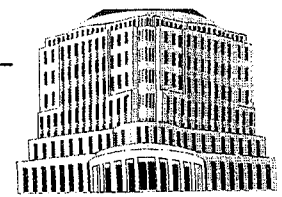
COMPANY NAME & ADDRESS DEPARTMENT/BUREAU	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: <u>IMPORTANT</u> (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
Procurement & Contracts Div. 400 South Orange Avenue, 4 th Floor Orlando, Florida 32801	Karen Elzy, Senior Purchasing Agent	<u>Karen.Elzy@cityoforlando.net</u>	(407) 246-2368	(407) 246-2869
City of Orlando, Business & Financial Services	Michelle McCrimmon, Chair 	michelle.mccrimmon@cityoforlando.net	X 2142	
SunTrust Bank 2005 Orange Ave. 4 th Fl. Orlando FL 32801	Carrie Evans 	carrie.evans@suntrust.com	407-237-6962	407-835-0291
SunTrust Bank 2005 Orange Ave 32801	Arnold Evans 	Arnold.evans@suntrust.com	407-237-4439	
"	Lorraine H. Waters 	Lorraine.waters@suntrust.com	407-237-6716	407-237-6791

PROCUREMENT AND CONTRACTS DIVISION


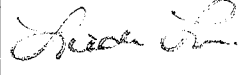
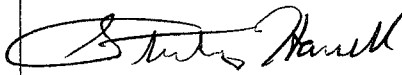

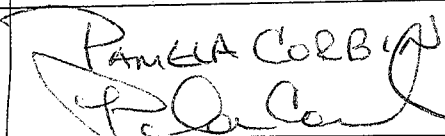
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Procurement and Contracts Division Presentation Sign-In Sheet – SunTrust Bank



Date: 6/10/15	Time: 9:45 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Marlin Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

COMPANY NAME & ADDRESS DEPARTMENT/BUREAU	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: IMPORTANT (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
CARIS AERINGTON 200 S. ORANGE AVE 4TH FLOOR ORLANDO, FL 32801	 CARIS AERINGTON	CARIS.AERINGTON@ SUNTRUST.COM	404.532.0173	
SUNTRUST 500 S. ORANGE AVE. ORLANDO, FL 32815	 LINDA LEE	Linda.Lee@SunTrust.com	407-237-4526	
SUNTRUST 200 S ORANGE AVENUE ORLANDO, FL 32801	 STERLING HARRELL	Sterling.harrell@SunTrust.com	407-237-4065	
OBFS	CHARS MCCULLION 			
CITY OF ORLANDO	PAMELA CORBIN 			

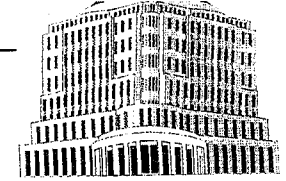
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Procurement and Contracts Division

Presentation Sign-In Sheet – SunTrust Bank



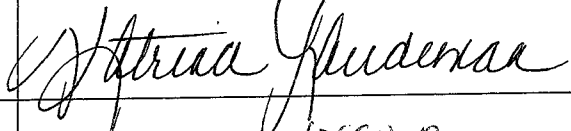
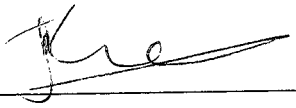
Date: 6/10/15

Time: 9:45 a.m.

Bid Number: RFP15-0193

Location: City Hall at One City Commons, 400 South Orange Avenue, Marlin Conference Room -4th Floor, Orlando, Florida

Title: GENERAL BANKING SERVICES

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OBFS	KATRINA LAUDERMAN 	katrina.laudeman@cityoforlando.net	2685	
OBFS	LAURIE NOSSAIR Jaimie E. Rossen	laurie.nossair@cityoforlando.net	407-246-2574	
OBFS	Faiz Khan 		2562	

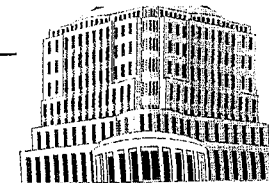
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CITY OF ORLANDO

Procurement and Contracts Division

Presentation Sign-In Sheet – Wells Fargo Bank, N.A.



Date: 6/10/15	Time: 11:00 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

COMPANY NAME & ADDRESS DEPARTMENT/DEPT.	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS IMPORTANT (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
Procurement & Contracts Div. 400 South Orange Avenue, 4 th Floor Orlando, Florida 32801	Karen Elzy, Senior Purchasing Agent	<u>Karen.Elzy@cityoforlando.net</u>	(407) 246-2368	(407) 246-2869
City of Orlando, Business & Financial Services	Michelle McCrimmon, Chair <i>Michelle mci</i>	<i>michelle.mccrimmon@cityoforlando.net</i>	X 2142	
Wells Fargo Bank 800 W. Magnolia Orlando, Ave.	Todd Morley <i>Todd Morley</i>	<i>todd.morley@wellsfargo.com</i>	407-649-5639	407-649-5855
Wells Fargo Bank 800 W. Magnolia Orlando	David Williams <i>David Williams</i>	<i>David Williams@wellsfargo.com</i>	386-290-8156	407-649-5400
Wells Fargo Bank 100 S Ashley Drive, 8th Floor Tampa FL 33602	Lynn Nieves <i>Lynn Nieves</i>	<i>Lynn.Nieves@wellsfargo.com</i>	813.225.4338	813-225-4450
Wells Fargo Bank 171 17 th St. Atlanta, GA 30093	Gwen Evans <i>Gwen EV</i>	<i>gwendolyn.evans@wellsfargo.com</i>	404-214-1441	404-214-1688

PROCUREMENT AND CONTRACTS DIVISION

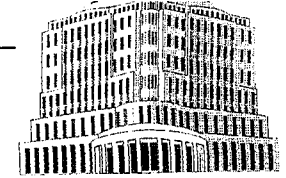
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CITY OF ORLANDO

Procurement and Contracts Division

Presentation Sign-In Sheet – Wells Fargo Bank, N.A.



Date: 6/10/15	Time: 11:00 a.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

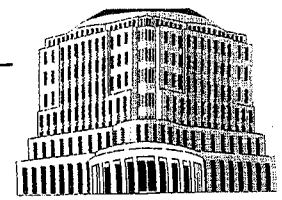
COMPANY NAME & ADDRESS DEPARTMENT/BUREAU	COMPANY REPRESENTATIVE (PLEASE PRINT LEGIBLE YOUR NAME & PROVIDE SIGNATURE)	EMAIL ADDRESS: IMPORTANT (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
OBFS	LAURIE NOSSAIR <i>Laurie E Nossair</i>	laurie.nossair@city. oforlando.net	407-246- 2574	
OBFS	CHRIS McCULLION <i>Chris</i>			
OBFS	KATRINA LAUSEMAN <i>Katrina Laudeman</i>	katrina.laudeman@ cityoforlando.net	2685	
City of Orlando	Pamela Corbin <i>Pamela Corbin</i>			

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Procurement & Contracts Division Committee Meeting Sign-In Sheet



Date: 6/10/15	Time: 12:00 p.m.	Bid Number: RFP15-0193	Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4 th Floor, Orlando, Florida
Title: GENERAL BANKING SERVICES			

	NAME (PLEASE PRINT) (PLEASE PRINT NAME & TITLE)	EMAIL ADDRESS (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
Procurement & Contracts Div. 400 South Orange Avenue, 4 th Floor Orlando, Florida 32801	Karen Elzy, Senior Purchasing Agent	<u>Karen.Elzy@cityoforlando.net</u>	(407) 246-2368	(407) 246-2869
City of Orlando, Business & Financial Services	Michelle McCrimmon, Chair <i>Michelle McCrimmon</i>	<i>michelle.mccrimmon@cityoforlando.net</i>	X2142	
City of Orlando	Pamela Corbin <i>Pamela Corbin</i>		3766	
OBFS	Fazie Khan <i>Fazie Khan</i>		2562	
OBFS	LAURIE NOSSAK <i>Laurie E. Nossak</i>		2574	

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CITY OF ORLANDO

Procurement & Contracts Division Committee Meeting Sign-In Sheet



Date: 6/10/15

Time: 12:00 p.m.

Bid Number: RFP15-0193

Location: City Hall at One City Commons, 400 South Orange Avenue, Tarpon Conference Room -4th Floor, Orlando, Florida

Title: GENERAL BANKING SERVICES

COMPANY NAME (PRINT NAME AND ADDRESS)	COMPANY REPRESENTATIVE (PLEASE PRINT NAME & SIGNATURE)	EMAIL ADDRESS: IMPORTANT (DO NOT LEAVE IN BLANK)	TELEPHONE #	FAX #
OBFS	CHRIS MCALLISTER 			
OBFS	KATRINA LAUDERMAN 			
MBE	DAWN CHIN SHUE 			

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RFP15-0193 GENERAL BANKING SERVICES
Ranking Tally

Proposer	Committee Member	Michelle McCrimmon	Chris McCullion	Imtiaz "Fazie" Khan	Katrina Laudeman	Pam Corbin	Total	Ranking
Wells Fargo Bank, N.A.		4	3	1	5	4	17	4
Bank United, NA		6	6	6	6	6	30	6
Bank of America/Merrill Lynch		1	1	1	1	2	6	1
J.P. Morgan Chase Bank, N.A.		2	2	1	2	3	10	2
SunTrust Bank, Inc.		3	4	4	3	1	15	3
BB&T		5	5	5	4	5	24	5

EVALUATION OF PROPOSALS FOR RFP15-0193 General Banking Services

NO.	CATEGORY	Possible Points	Wells Fargo Bank, N.A.	Bank United, NA	Bank of America/Merrill Lynch	J.P. Morgan Chase Bank, N.A.	SunTrust Bank, Inc.	BB&T
1	Proposer's Experience and Personnel	33	33	28	33	33	33	33
2	Financial Stability	10	10	7	10	10	10	10
3	Community Involvement	5	5	4	5	5	5	5
4	Service Requirements	25	20	18	25	25	24	24
5	Conversion/Implementation Plan	10	6	6	10	8	5	5
6	Price Proposal	10	9	8	6	7	10	5
7	Minority and Women Owned Business Enterprise - The degree of participation by City certified or	5	Ø	Ø	Ø	Ø	Ø	Ø
8	Veteran Business Enterprise participation in subcontracts	2	Ø	Ø	Ø	Ø	Ø	Ø
TOTAL POINT VALUE		100	83	71	89	88	87	82
RANKING BASED ON ABOVE POINTS (#1 reflects the highest point value; #2 is the next highest point value; etc.)			4	6	1	2	3	5

DATE: 6/10/15

EVALUATOR: michelle McCrimmon OF OBFS
(print name)

SIGNATURE: 

EVALUATION OF PROPOSALS FOR RFP15-0193 General Banking Services

NO.	CATEGORY	Possible Points	Wells Fargo Bank, N.A.	Bank United, NA	Bank of America/Merrill Lynch	J.P. Morgan Chase Bank, N.A.	SunTrust Bank, Inc.	BB&T
1	Proposer's Experience and Personnel	33	30	20	33	30	28	30
2	Financial Stability	10	9	7	10	9	8	9
3	Community Involvement	5	5	5	5	5	5	5
4	Service Requirements	25	18	15	22	22	20	20
5	Conversion/Implementation Plan	10	10	10	10	10	10	10
6	Price Proposal	10	10	8	6	7	10	5
7	Minority and Women Owned Business Enterprise - The degree of participation by City certified or	5	0	0	0	0	0	0
8	Veteran Business Enterprise participation in subcontracts	2	0	0	0	0	0	0
TOTAL POINT VALUE		100	82	65	86	83	81	79
RANKING BASED ON ABOVE POINTS (#1 reflects the highest point value; #2 is the next highest point value; etc.)			3	6	1	2	4	5

DATE: 6/10/15

EVALUATOR: CHAS McCullon OF OBFS
(print name)

SIGNATURE: 

EVALUATION OF PROPOSALS FOR RFP15-0193 General Banking Services

NO.	CATEGORY	Possible Points	Wells Fargo Bank, N.A.	Bank United, NA	Bank of America/Merrill Lynch	J.P. Morgan Chase Bank, N.A.	SunTrust Bank, Inc.	BB&T
1	Proposer's Experience and Personnel	33	30	28	33	32	32	32
2	Financial Stability	10	10	7	10	10	10	10
3	Community Involvement	5	5	4	5	5	5	5
4	Service Requirements	25	25	20	25	25	22	25
5	Conversion/Implementation Plan	10	10	7	10	10	10	10
6	Price Proposal	10	10	9	7	8	10	6
7	Minority and Women Owned Business Enterprise - The degree of participation by City certified or	5	0	0	0	0	0	0
8	Veteran Business Enterprise participation in subcontracts	2	0	0	0	0	0	0
TOTAL POINT VALUE		100	90	75	90	90	89	88
RANKING BASED ON ABOVE POINTS (#1 reflects the highest point value; #2 is the next highest point value; etc.)			1	6	1	1	4	5

DATE: 6/10/15

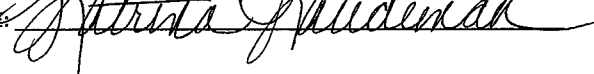
EVALUATOR: Farze Khan OF Finance
(print name)

SIGNATURE: 

EVALUATION OF PROPOSALS FOR RFP15-0193 General Banking Services

NO.	CATEGORY	Possible Points	Wells Fargo Bank, N.A.	Bank United, NA	Bank of America/Merrill Lynch	J.P. Morgan Chase Bank, N.A.	SunTrust Bank, Inc.	BB&T
1	Proposer's Experience and Personnel	33	30	20	33	33	33	33
2	Financial Stability	10	10	5	10	10	10	10
3	Community Involvement	5	5	5	5	5	5	5
4	Service Requirements	25	10	5	20	18	15	17
5	Conversion/Implementation Plan	10	10	5	10	10	8	10
6	Price Proposal	10	5	8	5	6	10	5
7	Minority and Women Owned Business Enterprise - The degree of participation by City certified or	5	0	0	0	0	0	0
8	Veteran Business Enterprise participation in subcontracts	2	0	0	0	0	0	0
TOTAL POINT VALUE		100	70	48	83	82	81	80
RANKING BASED ON ABOVE POINTS (#1 reflects the highest point value; #2 is the next highest point value; etc.)			5	6	1	2	3	4

DATE: 6/10/15

EVALUATOR: KATRINA LAURENMAN OF OBFS
(print name)SIGNATURE: 

EVALUATION OF PROPOSALS FOR RFP15-0193 General Banking Services

NO.	CATEGORY	Possible Points	Wells Fargo Bank, N.A.	Bank United, NA	Bank of America/Merrill Lynch	J.P. Morgan Chase Bank, N.A.	SunTrust Bank, Inc.	BB&T
1	Proposer's Experience and Personnel	33	32	28	32	31	32	30
2	Financial Stability	10	10	7	10	10	10	10
3	Community Involvement	5	5	5	5	5	5	5
4	Service Requirements	25	21	18	25	24	24	23
5	Conversion/Implementation Plan	10	7	6	10	8	8	8
6	Price Proposal	10	9	8	6	7	10	5
7	Minority and Women Owned Business Enterprise - The degree of participation by City certified or	5	0	0	0	0	0	0
8	Veteran Business Enterprise participation in subcontracts	2	0	0	0	0	0	0
TOTAL POINT VALUE		100	84	72	88	85	89	81
RANKING BASED ON ABOVE POINTS (#1 reflects the highest point value; #2 is the next highest point value; etc.)			4	6	2	3	1	5

DATE:

6/10/15

EVALUATOR:

(print name)

AMECA CORBIN

OF

PKG ADM MGR

SIGNATURE:

[Signature]