

Investment RFP Response Scoring Grid

For Use by Parish Finance/Investment/Council & Management



Scoring Categories

Instructions

On the following pages, please rate each firm across each of the below column categories on a scale of *one* to *three*, with *three* serving as the highest possible score.

I. General Information

- i. Firm Accolades
- ii. Number of Years in Consulting Business
- iii. General Perceived Strength of Resources
- iv. Local Representation
- v. Online Access
- vi. Contractual Fiduciary

II. Service Team

- i. Consultant Qualification
- ii. Quality of Like-Kind Client References
- iii. Low Consultant-to-Client Ratio
- iv. Dedicated Service Team
- v. Emphasis on Client Service
- vi. Clean Compliance Record

III. Service Offering

- i. Flexible Service Models (Traditional, Partial Discretionary, OCIO, etc.)
- ii. Philanthropic Group
- iii. Total Enterprise Consulting – Factors Operating Budget Forecasts & Development Goals into Investment Decisions
- iv. Fully Customizable Performance Reporting
- v. In-Person Availability (Ad-Hoc, Four Quarterly Meetings, etc.)
- vi. Business Focus & Fit

IV. Asset Allocation

- i. Strength of Asset Allocation Team
- ii. Capital Markets & Macro-Economic Analysis
- iii. Asset Allocation Software
- iv. Asset Allocation Approach
- v. Active/Passive Management
- vi. Customized Allocation
- vii. Role of Illiquid Investments

V. Manager Selection & Research Capabilities

- i. Manager Database
- ii. Open Architecture Manager Platform (i.e. No Proprietary Managers)
- iii. Separately Managed Account Platform
- iv. Strength & Differentiation of Manager Selection Process
- v. Number of Manager Research Analysts
- vi. Number of Funds/Managers Actively Tracked
- vii. Access to Top Alternative Investment Managers at Low Minimums

VI. Fee Levels

- i. Consulting Fee
- ii. Estimated Manager Fees
- iii. Custody Fee
- iv. Trading Costs
- v. All-Inclusive Consulting Fee?

General Information

Firm Name	Firm Accolades 1-3	Number of Years in Consulting Business #	General Strength of Resource 1-3	Local Presence 1-3	Online Access 1-3	Contractual Fiduciary 1-3	Total Average Score
Firm #1							
Firm #2							
Firm #3							
Firm #4							
Firm #5							
Firm #6							

Service Team

Firm Name	Consultant Qualification	Quality of Like-Kind References	Low Consultant-to-Client Ratio	Dedicated Service Team	Emphasis on Client Service	Clean Compliance Record	Total Average Score
Firm #1							
Firm #2							
Firm #3							
Firm #4							
Firm #5							

Service Offering

Firm Name	Flexible Service Models	Philanthropic Group	Total Enterprise Consulting	Fully Customizable Performance Reporting	In-Person Availability	Business Focus & Fit	Total Average Score
Firm #1							
Firm #2							
Firm #3							
Firm #4							
Firm #5							

Fees Levels

Firm Name	Consulting Fee	Estimated Manager Fees	Custody Fee	Trading Costs	Additional Costs	TOTAL SCORE
Firm #1						
Firm #2						
Firm #3						
Firm #4						
Firm #5						

Scoring Grid Totals

Firm Name	General Information	Service Team	Service Offering	Asset Allocation	Manager Selection & Research Capabilities	Fee Levels	GRAND TOTAL
Firm #1							
Firm #2							
Firm #3							
Firm #4							
Firm #5							