



District School Board of Pasco County

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Heather Fiorentino, Superintendent

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September 6, 2005

MEMORANDUM

TO: Honorable Board Members

FROM: Kendra Goodman, CPPB, Purchasing Agent

RE: RFP 03-063, Financial Advisor Services
Ford & Associates, Inc.
Extension of Three-Year Contract by One Year

On August 10, 2004, official action (attached) was taken to award the above-referenced contract to Ford & Associates, Inc. This is a three-year contract, renewable annually based on the mutual consent of the parties. The final year of the agreement will expire on October 31, 2005.

Purchasing contacted Ms. Olga Swinson, Director of Finance Services, to determine the status of a new solicitation. Ms. Swinson considers the services of Ford & Associates satisfactory, and has requested that the existing RFP be extended by one (1) year. This time extension is permitted per the terms of the original RFP. Accordingly, Ford & Associates was contacted, and has verified in writing their willingness to extend the terms and conditions of the contract by one (1) year.

At this time, it is my recommendation to extend the existing terms and conditions of the RFP for one (1) additional year. The contract period will be November 1, 2005 – October 31, 2006. Should you have any questions, or wish to discuss this matter further, please feel free to contact me at your earliest convenience.

KDG/az
Attachments