BROWARD COUNTY FLORIDA

Finance and Administrative Services Department
PURCHASING DIVISION
115 S. Andrews Avenue, Room 212 • Fort Lauderdale, Florida 33301 • 954-357-6066 • FAX 954-357-8535

DATE: October 10, 2022

TO: Evaluation Committee Members

THRU: Danea Cohen-Ebanks, Purchasing Manager

Danea Cohen-Ebanks Digitally signed by PURCHASING MANAGER and on behalf of ROBERT E. GLEASON, DIRECTOR OF PURCHASING Date: 2022.10.10 15:34:10 -04'00'

FROM: Mike Mullen, Purchasing Agent Senior

MICHAEL MULLEN Digitally signed by MICHAEL MULLEN Date: 2022.10.10 14:58:05 -04'00'

SUBJECT: Director of Purchasing Memorandum
RFP No. GEN2124409P1, Voluntary Emergency Loan Program
Four (4) Submittals

REFERENCE: Procurement Code, Section 21.40, Determinations of Responsiveness and Responsibility:
21.40 (a) Determination of Responsiveness
21.40 (b) Determination of Responsibility

The following proposers submitted solicitation responses:

BMG Money, Inc.
CreditWorks, LLC
Employee Loan Solutions, LLC dba TrueConnect
Safra National Bank of New York dba Access Loans

Subsequent to the solicitation response deadline (August 19, 2022), Safra National Bank of New York dba Access Loans withdrew their proposal due to internal reorganization of their business lines. Refer to Safra National Bank of New York dba Access Loans withdrawal email dated September 21, 2022.

Determination of Responsiveness:
A Responsive (Vendor) means a vendor who submits a response to a solicitation that the Director of Purchasing determines meets all requirements of the solicitation, as provided in Section 21.40(a) of the Procurement Code.

In accordance with Procurement Code Section 21.40(a), Determination of Responsiveness, "A solicitation may only be awarded to a vendor whose submission is responsive to the requirements of the solicitation… For solicitations in which an Evaluation Committee has been appointed, the Director of Purchasing's determination regarding responsiveness is not binding on the Evaluation Committee, which may accept or reject such determination but must state with specificity the basis for any rejection thereof."

Based on the solicitation requirements and each vendor's response, Two (2) vendors, BMG Money, Inc. and CreditWorks, LLC, are recommended to be evaluated as responsive to the solicitation's responsiveness requirements. Employee Loan Solutions, LLC dba TrueConnect is being recommended as non-responsive to the solicitation's responsiveness requirements. Please refer to the Responsiveness and Responsibility Matrix for responsiveness requirements details and applicable supporting memoranda.

Determination of Responsibility:
A Responsible (Vendor) means a vendor who is determined to have the capability in all respects to perform fully the requirements of a solicitation, as well as the integrity and reliability that will ensure good faith performance, as provided in Section 21.40(b) of the Procurement Code.

In accordance with Procurement Code Section 21.40(b), Determination of Responsibility, "A solicitation may only be awarded to a vendor who is determined to be responsible to provide the goods or services requested by the solicitation. If a response to a solicitation is submitted by a joint venture, the joint venture will not be eligible to receive an award unless each member of the joint venture is determined to be responsible."

Additionally, Section 21.40(b) further provides that "A determination of responsibility shall be made only as to those vendors whose submissions have been determined to be responsive." Subsection (2) states: "The Evaluation Committee, with assistance of the Purchasing Division and based on information provided by the applicable County Agencies and the Office of the County Attorney, shall determine whether vendors who have submitted responsive submissions are responsible." Subsection (4) states: "When making determinations of responsibility, the Director of Purchasing or the Evaluation Committee (as applicable) may request additional information from any vendor on matters that may affect a vendor's responsibility. The failure of a vendor to provide information requested by the County may result in a determination of non-responsible. In addition, a vendor may submit information regarding its responsibility; provided, however, that such information shall not be considered if it contradicts or materially alters the information provided by the vendor in its original response to the solicitation."

Please refer to the Responsiveness and Responsibility Matrix for responsibility requirements details, applicable supporting memoranda, and vendor's submittal as information to the Committee Members.

Recap:
A draft Director of Purchasing's Memorandum and the five (5) supporting documents from the Office of Economic and Small Business Development, the Finance and Administrative Services Department, the County Attorney's Office, the Risk Management Division, Enterprise Technology Services Division, and the Human Resources Division were emailed to proposers with a request that, if a proposer desires to clarify any information provided in their response, they should do so in writing. All written explanations received were subsequently reviewed by staff, as applicable.

Committee Members must consider all pertinent information when rendering a determination on responsiveness and responsibility as defined by the County's Procurement Code.

Attachment(s):
1) Safra National Bank of New York dba Access Loans email dated September 21, 2022
2) Responsiveness and Responsibility Matrix
3) BMG Money, Inc. email dated September 29, 2022

4) Additional Vendor Information:
    a. BMG Money, Inc. email dated October 5, 2022
    b. CreditWorks, LLC email dated October 5, 2022
    c. CreditWorks, LLC Reference Verification Email dated October 7, 2022

Referenced Memoranda and Supporting Information:
1) Office of Economic and Small Business Development Review Memorandum
2) Financial Review Memorandum – Finance and Administrative Services Department
3) Litigation Review Memorandum – County Attorney's Office
4) Insurance Review Memorandum - Risk Management Division
5) Vendor Security Questionnaire Review Memorandum - Enterprise Technology Services Division
6) Vendor Reference Verifications and Broward County Vendor Performance Evaluations

c: Bob Melton, County Auditor, Office of the County Auditor
Robert E. Gleason, Director, Purchasing Division Finance and Administrative Services Department
Fernando Amuchastegui, Senior Assistant County Attorney, Office of the County Attorney
Lisa Morrison, Human Resources Manager (Project Manager), Human Resources Division, Finance and Administrative Services Department

REG/dce/mm

From: John Grogan <john.grogan@accessloans.com>
Sent: Wednesday, September 21, 2022 4:27 PM
To: Henderson, Melinda; Mullen, Michael
Cc: ricardo.janini@safra.com; Morrison, Lisa; Canchon, Daniel; McGowan, Gail; Percival-Dangleben, Martha; Pounall, Colleen; Renata Schlesinger
Subject: Re: RFP Submittal Review - GEN2124409P1 - Voluntary Emergency Loan Program (Vendor Security Questionnaire) - Safra

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Broward County team,

I am incredibly sorry to inform you that due to internal reorganization of business lines, we will have to withdraw from the RFP process for this bid.

My sincerest apologies for this development coming at this stage of the process.

I am available at any time to answer questions, concerns, or to help wind up this application.

Best regards,

John

John Grogan | FVP Consumer Lending | (818) 235-8747

ACCESS LOANS

A. RESPONSIVENESS CRITERIA:

SECTION		BMG Money, Inc.	CreditWorks, LLC	Employee Loan Solutions, LLC dba TrueConnect
1	Lobbyist Registration Requirement Certification	Retained [1]	Not Retained	Not Retained
2	Criminal History Screening Practices Certification	Complies (Implemented or Will Implement)	Complies (Implemented or Will Implement)	Complies (Implemented or Will Implement)
3	Domestic Partnership Act Certification	Currently Complies	Currently Complies	Currently Complies
4	Addenda	Acknowledged	Acknowledged	Not Acknowledged [2]

Additional Information:

[1] **BMG Money, Inc.** has retained Bernie Friedman and Nicholas Matthews of Becker & Poliakoff.

[2] **Employee Loan Solutions, LLC dba TrueConnect** did not acknowledge in Periscope S2G Addendum No. 2 which replaced the Project Specific Vendor Questionnaire. Therefore, per solicitation requirements, Standard Instructions to Vendors, Section A.3, Employee Loan Solutions, LLC dba TrueConnect is non-compliant to the Addenda, as the revised Project Specific Vendor Questionnaire was not submitted with their proposal.

Additional Information: In response to the Director of Purchasing's Draft Memorandum, to which the vendor can respond within 48 hours to any comments or deficiencies, Employe Loan Solutions, LLC did not provide a response.

B. RESPONSIBILITY CRITERIA:

SECTION		BMG Money, Inc.	CreditWorks, LLC	Employee Loan Solutions, LLC dba TrueConnect
1	Litigation History:			
	Number of Disclosed Cases	0	0	0
	Litigation with Broward County	No	No	No
2	Financial Information	Provided	Provided [3]	Not Provided [4]
3	Authority to Conduct Business in Florida (Sunbiz)	Authorized	Authorized	Not Authorized [5]
4	Affiliated Entities of the Principal(s) Certification	No Affiliates	No Affiliates	No Affiliates
5	Insurance Requirements	Complies	Complies	Not Compliant [6]
6	Ownership Disclosure	Complies (Submitted Completed Form)	Complies (Submitted Completed Form)	Complies (Submitted Completed Form)
7	Project Specific Vendor Questionnaire	Provided	Provided	Not Provided [7]
8	License Requirements	Complies	Complies	Not Compliant [8]
9	Vendor Security Questionnaire	Provided	Provided	Provided

Additional Information: Refer to vendor's initial submittal and supporting review memorandum.

[3] **CreditWorks, LLC** provided their most recent two years of Financial Statements. However, the County was unable to calculate their current ratio. Refer to the Financial Review Memorandum dated September 23, 2022 for additional information.

Additional Information: In response to the Director of Purchasing's Draft Memorandum (which included the Financial Review Memorandum and Vendor Security Review Memorandum), to which the vendor can respond within 48 hours to any comments or deficiencies, CreditWorks, LLC provided the following responses:
CreditWorks, LLC provided updated financial information to include data for Years 2020 and 2021. Refer to CreditWorks, LLC email dated October 5, 2022 and revised Financial Review Memorandum dated October 6, 2022.
CreditWorks, LLC provided a response regarding Vendor Security Questionnaire, Section 1, Question No. 9., System and Organizational Controls (SOC). Refer to CreditWorks, LLC email dated October 5, 2022. Per the solicitation requirements, CreditWorks, LLC's SOC report does not address all five (5) Trust Service Principles (only Security). Therefore, the Vendor Security Questionnaire Review Memorandum dated September 26, 2022 remains unchanged.

[4] **Employee Loan Solutions, LLC dba TrueConnect** did not provide their most recent two years of Fiancial Statements. Therefore, per solicitation requirements, Standard Instructions to Vendors, Section B.2, Employee Loan Solutions, LLC dba TrueConnect is non-compliant to financial information requirements. Refer to the Financial Review Memorandum dated September 23, 2022 for additional information.

[5] **Employee Loan Solutions, LLC dba TrueConnect** did not provide evidence of authorization, or an application for the authority to transact business in the State of Florida as per Standard Instructions to Vendors, Section B.3 (refer to subsection a.) Further, pursuant to Section B.3.d, Employee Loan Solutions, LLC dba TrueConnect is not listed as an active vendor with the Florida Department of State Division of Corporations. Therefore, Employee Loan Solutions, LLC dba TrueConnect is non-compliant to the authority to conduct business in Florida requirements.

[6] **Employee Loan Solutions, LLC dba TrueConnect** did not provide proof of Insurance that reflects the complete requirements as deemed necessary for this project. Therefore, per solicitation requirements, Standard Instructions to Vendors, Section B.5., Employee Loan Solutions, LLC dba TrueConnect is non-compliant to the insurance requirements (specifically the Crime/Employee Dishonesty). Refer to Insurance Compliance Review Memorandum dated September 26, 2022 for additional information.

[7] **Employee Loan Solutions, LLC dba TrueConnect** did not provide the revised Project Specific Vendor Questionnaire as required in Addendum No. 2. Therefore, per solicitation requirements, Special Instructions to Vendors, Section 2.2., Employee Loan Solutions, LLC dba TrueConnect is non-compliant to the Project Specific Vendor Questionnaire requirements.

[8] **Employee Loan Solutions, LLC dba TrueConnect** did not provide a current and valid Consumer Finance Company license. Therefore, per solicitation requirements, Special Instructions to Vendors, Section 2.3., Employee Loan Solutions, LLC dba TrueConnect is non-compliant to the Consumer Finance Company license requirements.

Additional Information: In response to the Director of Purchasing's Draft Memorandum, to which the vendor can respond within 48 hours to any comments or deficiencies, **Employee Loan Solutions, LLC dba TrueConnect** did not provide a response to any of the noted comments.

C. ADDITIONAL REQUIREMENTS/INFORMATION:

	SECTION	BMG Money, Inc.	CreditWorks, LLC	Employee Loan Solutions, LLC dba TrueConnect
1	County Standard Terms and Conditions	Exceptions Taken [9]	No Exceptions	No Exceptions
2	References:			
	Proposer Provided Minimum of Three	Yes	Yes	No [11]
	County Verified	Yes [10]	Yes	Yes
3	Performance Evaluations:	Yes	No	No
4	Cone of Silence, Number of Violations	0	0	0
5	Volume of Previous Work (Tie-Breaker Criteria):			
	Proposer Reported, Amount Paid to Prime	$0.00	$0.00	$0.00
	Proposer Reported, Amount Paid to CBE Firm(s)	$0.00	$0.00	$0.00
	County Reported, Amount Paid to Prime	$0.00	$0.00	$0.00
	County Reported, Amount Paid to CBE Firm(s)	$0.00	$0.00	$0.00
	County Reported Prime less County Reported CBE	$0.00	$0.00	$0.00
	Points Allocated based on Evaluation Criteria	Not Applicable	Not Applicable	Not Applicable
6	Local Preference:			
	Location Certification Form	Not Local	Not Local	Not Local
	Points Allocated (Based on Evaluation Criteria)	0	0	0

Additional Information:

[9] **BMG Money, Inc.** took exceptions to the Scope of Services, Section 4 General Information and Current Plan Guidelines.

[10] **BMG Money, Inc.** provided four (4) references which complies with the solicitation requirements of a minimum of three (3) references. However, the County was unable to verify the reference provided from Miami-Dade County. Refer to BMG Money, Inc. Reference Verification Form Email dated September 29, 2022.

Additional Information: In response to the Director of Purchasing's Draft Memorandum, to which the vendor can respond within 48 hours to any comments or deficiencies, BMG Money, Inc. provided the following responses:

BMG Money, Inc. provided a response regarding their exceptions taken to Section 4, General Information and Current Plan Guidelines. Refer to BMG Money, Inc. email dated October 5, 2022.

BMG Money, Inc. provided a response regarding their Miami-Dade County Employee Discount Program reference. Refer to BMG Money, Inc. email dated October 5, 2022.
After further review, per the solicitation requirements, proposer should provide references for similar work performed to show evidence of qualifications and previous experience, and as stated in the BMG Money, Inc. Reference Verification Form Email dated September 29, 2022, "...I just cannot speak to any contractual performance questions." Therefore, the Miami-Dade County Employee Discount Program reference remains unverified. However, as this is one of the provided four references, an additional reference is not required.

BMG Money, Inc. provided a response stating that CreditWorks, LLC references from Ochsner Clinic Foundation and Ochsner LSU Health System has the same website/email domain, therefore they do not meet the minimum required three (3) references. Refer to BMG Money, Inc. email dated October 5, 2022.
After further review, the County requested clarification from CreditWorks, LLC to which they have verified that Ochsner Clinic Foundation and Ochsner LSU Health System are two separate business entities. Refer to CreditWorks, LLC Reference Verification email dated October 7, 2022 and supporting documentation from Sunbiz.org and State of Louisiana Secretary of State. Therefore, per the solicitation requirements, CreditWorks, LLC has met the minimum of three (3) references.

[11] **Employee Loan Solutions, LLC dba TrueConnect** did not provide the required three (3) references in their submittal. After the County's request, Employee Loan Solutions, LLC dba TrueConnect provided two (2) references which does not comply with the solicitation references requirements.

Additional Information: In response to the Director of Purchasing's Draft Memorandum, to which the vendor can respond within 48 hours to any comments or deficiencies, **Employee Loan Solutions, LLC dba TrueConnect** did not provide a response to the noted comment.

D. TIEBREAKER:

	AREAS	BMG Money, Inc.	CreditWorks, LLC	Employee Loan Solutions, LLC dba TrueConnect
1	Local Certification (per Procurement Code, Section 21.42.d.) and Business Tax Receipt (included with Submittal)	Nonlocal	Nonlocal	Nonlocal
2	Domestic Partnership Act Certification (Vendor must currently offer Domestic Partnership benefit)	Currently Complies/Offers	Currently Complies/Offers	Currently Complies/Offers
3	Volume of Work over Five Years (order for tiebreaker based on C.5 above)	Refer to C.5 for VOW calculations	Refer to C.5 for VOW calculations	Refer to C.5 for VOW calculations

E. EVALUATION CRITERIA:

		BMG Money, Inc.	CreditWorks, LLC	Employee Loan Solutions, LLC dba TrueConnect
1	Evaluation Criteria Responses	Provided	Provided	Not Provided [12]

Additional Information:

[12] **Employee Loan Solutions, LLC dba TrueConnect** did not submit responses to the Evaluation Criteria questions. Therefore, per solicitation requirements, Standard Instructions to Vendors, Section F, since Employee Loan Solutions, LLC dba TrueConnect failed to submit any information and/or documentation required by the evaluation criteria, they will not be evaluated or scored for the corresponding evaluation criteria.

Additional Information: In response to the Director of Purchasing's Draft Memorandum, to which the vendor can respond within 48 hours to any comments or deficiencies, **Employee Loan Solutions, LLC dba TrueConnect** did not provide a response to the noted comment.

From: Tom McCormick <tom.mccormick@bmgmoney.com>
Sent: Wednesday, October 5, 2022 4:59 PM
To: Mullen, Michael
Cc: Tom McCormick
Subject: RE: TIMED REQUEST: Review of 48hr DRAFT Director of Purchasing Memorandum - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program

Follow Up Flag: Follow up
Flag Status: Flagged

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Mr. Mullen:

Thank you for the opportunity to respond as per your instructions below.

We only have the following brief comments:

1. None of the exceptions taken to the Scope of Services, Section 4 General Information and Current Plan Guidelines will impair Broward County. The first two merely provide the County CFO with the discretion to increase maximum loan amounts or terms, in the CFO's sole discretion. The final exception merely clarifies that for a closed-end installment loan, it is not possible to change the terms after the employee has agreed to the loan agreement and payment amount. The most-favored nation price protection the County seeks will be offered to the County, of course.

2. We understand that Broward County was unable to verify the reference provided from Miami-Dade County. Refer to BMG Money, Inc. Reference Verification Form Email dated September 29, 2022. We would like to note that the e-mail referred to does confirm that Miami-Dade County is in fact a client and does reflect favorably upon our service delivery to Miami-Dade County. Note following from the e-mail message:

   "As such, I have had the opportunity to work with Carlos Ramos and Tom McCormick. I have found the team at BMG professional and accessible. They respond quickly to emails and calls. They have attended several in-person events to conduct outreach as well. To my knowledge they have engaged with our workforce without issue. I have not received any negative feedback."

3. We note that two of CreditWorks' references appear to have the same website/e-mail domain name (ochsner.org). Are they in fact separate employer clients meeting the minimum required by Broward County?

Thank you.

Best,

Tom

Tom McCormick
Co-Chief Executive Officer
+1.305.851.6137
tom.mccormick@bmgmoney.com
BMG Money, Inc.

444 Brickell Avenue, Suite 250
Miami, FL 33131

445 South Figueroa Street, Suite 3185
Los Angeles, CA 90071

bmgmoney.com

From: Mullen, Michael <MMullen@broward.org>
Sent: Monday, October 3, 2022 1:22 PM
To: Tom McCormick <tom.mccormick@bmgmoney.com>; Jose Patino <jose.patino@bmgmoney.com>; Marion Mathes <mmathes@creditworksonline.com>; Pamela Buchanan <pbuchanan@creditworksonline.com>; Doug Farry <doug@emploan.com>; matthew@emploan.com; John Grogan <john.grogan@accessloans.com>; ricardo.janini@safra.com
Cc: Cohen-Ebanks, Danea <DCohen@broward.org>; Morrison, Lisa <LMORRISON@broward.org>
Subject: TIMED REQUEST: Review of 48hr DRAFT Director of Purchasing Memorandum - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program

To: All Proposers

Attached is the DRAFT Director of Purchasing Memorandum including five (5) supporting memoranda for your review.

If any deficiencies are noted any memoranda concerning your firm, you have the opportunity to make explanation in writing via email of those deficiencies to the undersigned below by **5:00 PM (EST) on Wednesday, October 5, 2022**. Your explanations will be forwarded to members of the Evaluation Committee, for their review and consideration.

NOTE: Information pertaining to the Combination Initial and Final Evaluation Committee Meeting will be forthcoming. Please continue to monitor the Sunshine Meeting Notice Directory website for updated information: http://www.broward.org/Commission/Pages/SunshineMeetings.aspx.

As the Cone of Silence is currently in effect (a copy of the Cone of Silence Ordinance can be found here), please **do not reply all to this email.**

If you have any questions, please contact me directly.

Respectfully,

Michael Mullen, CPPB
Purchasing Agent Senior
Purchasing Division
115 S Andrews Ave, Rm 212
Fort Lauderdale, FL 33301
954-357-6114
mmullen@broward.org

From:	Marion Mathes <mmathes@creditworksonline.com>
Sent:	Wednesday, October 5, 2022 3:08 PM
To:	Mullen, Michael
Cc:	Pamela Buchanan
Subject:	RE: TIMED REQUEST: Review of 48hr DRAFT Director of Purchasing Memorandum - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program
Attachments:	CreditWorks LLC CONFIDENTIAL Financial Information Current Ratio Detail.pdf; soc-2-report-salesforce-services_2021-11-01-2022-04-30.pdf; Q2 Software 2021 Cloud Lending SOC2 T2 Final.pdf
Follow Up Flag:	Follow up
Flag Status:	Flagged

Hi Michael-

We are responding to your email below with additional information about the deficiencies discussed in the draft memorandum. We would like to expand upon our answer from the Vendor Security Questionnaire about SOC 2 compliance, as well as the presentation of the confidential financial statements that prevented the County from calculating the Company's current ratio.

Regarding the Vendor Security Questionnaire Section 1 Question 9 about SOC 2 compliance, please note that while our organization does not have a current SOC 2 report, our loan system (Cloud Lending, a Q2 Company) does have a current report, which is attached. Further, our hosting platform (Salesforce) is also SOC 2 compliant. Please see attached reports for these service providers, which house all of our customer data.

Regarding the financial statement review, please see attached confidential pdf which shows the breakdown of current assets and current liabilities as of 12/31/2020 and 12/31/2022. This will allow the calculation of our current ratio.

Please let us know if there are any further questions. Thank you.
Kind regards,
Marion

Marion H. Mathes
Credit4Work!

WOMEN OWNED

305-520-9830 (o)
843-513-3056 (m)
CreditWorks LLC
3191 Coral Way, Suite 203
Miami, FL 33145

www.creditworksonline.com; www.credit4work.com

From: Mullen, Michael <MMullen@broward.org>
Sent: Monday, October 3, 2022 1:22 PM
To: Tom McCormick <tom.mccormick@bmgmoney.com>; Jose Patino <jose.patino@bmgmoney.com>; Marion Mathes <mmathes@creditworksonline.com>; Pamela Buchanan <pbuchanan@creditworksonline.com>; Doug Farry <doug@emploan.com>; matthew@emploan.com; John Grogan <john.grogan@accessloans.com>; ricardo.janini@safra.com
Cc: Cohen-Ebanks, Danea <DCohen@broward.org>; Morrison, Lisa <LMORRISON@broward.org>
Subject: TIMED REQUEST: Review of 48hr DRAFT Director of Purchasing Memorandum - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program

To: All Proposers

Attached is the DRAFT Director of Purchasing Memorandum including five (5) supporting memoranda for your review.

If any deficiencies are noted any memoranda concerning your firm, you have the opportunity to make explanation in writing via email of those deficiencies to the undersigned below by **5:00 PM (EST) on Wednesday, October 5, 2022**. Your explanations will be forwarded to members of the Evaluation Committee, for their review and consideration.

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As the Cone of Silence is currently in effect (a copy of the Cone of Silence Ordinance can be found here), please **do not reply all to this email.**

If you have any questions, please contact me directly.

Respectfully,

BROWARD COUNTY FLORIDA

Michael Mullen, CPPB
Purchasing Agent Senior
Purchasing Division
115 S Andrews Ave, Rm 212
Fort Lauderdale, FL 33301
954-357-6114

mmullen@broward.org

CPPB
CERTIFIED PROFESSIONAL
PUBLIC BUYER

From: Marion Mathes <mmathes@creditworksonline.com>
Sent: Friday, October 7, 2022 1:13 PM
To: Mullen, Michael
Cc: Pamela Buchanan; Cohen-Ebanks, Danea
Subject: RE: TIMED REQUEST: Reference Verification - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program
Attachments: Ocshner LSU Health System LA Business Record.pdf

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Hi Mike-

Please see the attached from the Louisiana Secretary of State which shows Ochsner LSU Health System as a non-profit corporation of its own. There are some managed services provided by Ochsner Clinic to Ochsner LSU Health, as many companies engage with each other through these types of contracts, but the two are separate entities. Let me know if this is sufficient or if you would like further documentation to confirm separate ownership from Ochsner Clinic Foundation.

Thank you,

Marion

Marion H. Mathes

Credit4Work!

WOMEN OWNED

305-520-9830 (o)
843-513-3056 (m)
CreditWorks LLC
3191 Coral Way, Suite 203
Miami, FL 33145
www.creditworksonline.com; www.credit4work.com

From: Mullen, Michael <MMullen@broward.org>
Sent: Friday, October 7, 2022 12:18 PM
To: Marion Mathes <mmathes@creditworksonline.com>
Cc: Pamela Buchanan <pbuchanan@creditworksonline.com>; Cohen-Ebanks, Danea <DCohen@broward.org>
Subject: RE: TIMED REQUEST: Reference Verification - RFP No. GEN2124409P1 - Voluntary Emergency Loan Program

Good Afternoon,

In response to the 48hr Draft PD Memo, a comment was received regarding your attached two references from Ochsner Clinic Foundation, and Ochsner LSU Health System stating they are the same entity. Please assist with the following:

1. Per Sunbiz.org, we found the attached regarding Ochsner Clinic Foundation, please confirm this is the entity noted on your reference.
2. Per Sunbiz.org, no record was found for Ochsner LSU Health System, please provide proof of this being a separate entity, or provide an additional reference.

Regards,

BROWARD COUNTY FLORIDA

Michael Mullen, CPPB
Purchasing Agent Senior
Purchasing Division
115 S Andrews Ave, Rm 212
Fort Lauderdale, FL 33301
954-357-6114
mmullen@broward.org

CPPB CERTIFIED PROFESSIONAL PUBLIC BUYER

Detail by Entity Name

Foreign Not For Profit Corporation
OCHSNER CLINIC FOUNDATION INC.

Cross Reference Name

OCHSNER CLINIC FOUNDATION

Filing Information

Document Number	F20000001128
FEI/EIN Number	NONE
Date Filed	02/26/2020
State	LA
Status	ACTIVE

Principal Address

1514 JEFFERSON HWY
NEW ORLEANS, LA 70121

Mailing Address

1514 JEFFERSON HWY
NEW ORLEANS, LA 70121

Registered Agent Name & Address

CT CORPORATION SYSTEM
1200 S PINE ISLAND RD
PLANTATION, FL 33324

Officer/Director Detail

Name & Address

Title President, Director

Thomas, Warner L.
1514 JEFFERSON HWY
NEW ORLEANS, LA 70121

Annual Reports

Report Year	Filed Date
2021	06/30/2021
2022	04/04/2022

Document Images

04/04/2022 – ANNUAL REPORT	View image in PDF format
06/30/2021 – ANNUAL REPORT	View image in PDF format
02/26/2020 – Foreign Not for Profit	View image in PDF format

State of Louisiana Secretary of State

COMMERCIAL DIVISION
225.925.4704

Fax Numbers
225.932.5317 (Admin. Services)
225.932.5314 (Corporations)
225.932.5318 (UCC)

Name	Type	City	Status
OCHSNER LSU HEALTH SYSTEM OF NORTH LOUISIANA	Non-Profit Corporation	SHREVEPORT	Active

Previous Names

Business: OCHSNER LSU HEALTH SYSTEM OF NORTH LOUISIANA
Charter Number: 43169954N
Registration Date: 8/21/2018
Domicile Address
1541 KINGS HWY
SHREVEPORT, LA 71103
Mailing Address
1541 KINGS HWY
SHREVEPORT, LA 71103

Status

Status: **Active**
Annual Report Status: **In Good Standing**
File Date: 8/21/2018
Last Report Filed: 7/22/2022
Type: Non-Profit Corporation

Registered Agent(s)

Agent:	C T CORPORATION SYSTEM
Address 1:	3867 PLAZA TOWER DR.
City, State, Zip:	BATON ROUGE, LA 70816
Appointment Date:	8/21/2018

Officer(s)

Additional Officers: No

Officer:	STEVE SKRIVANOS
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	CAROLYN HUNT
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	TIMOTHY JONES

Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	JACQUELINE SCOTT
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	CINDY REVES
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	CHARLES DAIGLE
Title:	President
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	SHELLEY SULLIVAN TYNAN
Title:	Secretary
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	WARNER L. THOMAS
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	DAVID LEWIS
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	II PETER NOVEMBER
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	LEONARDO SEOANE
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	LESTER WAYNE JOHNSON
Title:	Director
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Officer:	III VERNON MOORE
Title:	Treasurer
Address 1:	1541 KINGS HWY
City, State, Zip:	SHREVEPORT, LA 71103

Amendments on File (1)

Description	Date
Restated Articles	10/1/2018

Print

BROWARD COUNTY FLORIDA
OFFICE OF ECONOMIC AND SMALL BUSINESS DEVELOPMENT
Governmental Center Annex
115 S. Andrews Avenue, Room A680 • Fort Lauderdale, Florida 33301 • 954-357-6400

MEMORANDUM

DATE: September 6, 2022

TO: Michael Mullen, CPPB, Purchasing Agent Senior
Purchasing Division

THRU: Sandy-Michael McDonald, Director
Office of Economic and Small Business Development

SANDY-MICHAEL MCDONALD Digitally signed by SANDY-MICHAEL MCDONALD Date: 2022.09.13 15:00:25 -04'00'

FROM: Maribel Feliciano, Assistant Director
Office of Economic and Small Business Development

MARIBEL FELICIANO Digitally signed by MARIBEL FELICIANO Date: 2022.09.12 11:21:48 -04'00'

SUBJECT: RFP No. GEN2124409P1 - Voluntary Emergency Loan Program Volume of Work on Active and Completed Projects August 2017 to August 2022

The Purchasing Division is requesting small business subcontractors' payment data on active and completed projects from August 2017 to August 2022 awarded to respondents of Solicitation No. GEN2124409P1. A goal was not established to this solicitation; however, as part of the evaluation criteria, Purchasing must determine the volume of previous work for all vendor submittals. OESBD is providing the following payment data for projects with small business participation as follows:

Volume of Work – ACTIVE & COMPLETED PROJECTS

Source: ALTS and Contracts Central

BMG Money, Inc. – Active & Completed Projects
OESBD found no active or completed projects with CBE requirements within the last 5 years for BMG Money, Inc.

CreditWorks, LLC – Active & Completed Projects
OESBD found no active or completed projects with CBE requirements within the last 5 years for CreditWorks, LLC.

Employee Loan Solutions, LLC dba True Connect - Active & Completed Projects
OESBD found no active or completed projects with CBE requirements within the last 5 years for Employee Loan Solutions, LLC dba TrueConnect.

Safra National Bank of New York dba Access Loans - Active & Completed Projects
OESBD found no active or completed projects with CBE requirements within the last 5 years for Safra National Bank of New York dba Access Loans.

Performance of Affiliated Entities:
The following is a report of the respondents' declared affiliated entities in meeting small business participation commitments on CBE projects completed within the last five (5) years of the RFQ's opening date. The information is compiled from various sources including Contracts Central and OESBD's Activity Log Tracking System (ALTS).

No affiliated entities of principal(s) were declared by the following vendors:

- BMG Money, Inc.
- CreditWorks, LLC
- Employee Loan Solutions, LLC dba True Connect
- Safra National Bank of New York dba Access Loans

Consequently, no active or completed projects with CBE requirements within the last 5 years can be reported on affiliated entities.

If you have any concerns regarding available subcontracting opportunities, please contact our office at (954) 357-6400.

cc: Oswaldo Casco, Small Business Development Supervisor, OESBD
Donna-Ann Knapp, Small Business Development Manager, OESBD

FINANCE AND ADMINISTRATIVE SERVICES DEPARTMENT
115 S. Andrews Avenue, Room 513 • Fort Lauderdale, Florida 33301 • 954-357-7130 • FAX 954-357-7134 • Email: finance@broward.org

MEMORANDUM

To: Lisa Morrison, Project Managers, Human Resources Division

Cc: Michael Mullen, Purchasing Agent Senior, Purchasing Division

From: Lori Fortenberry, Acting Finance Manager
Finance and Administrative Services Department

Digitally signed by LORI FORTENBERRY
Date: 2022.10.06
14:08:31 -04'00'

Date: October 6, 20221

Re: **GEN2124409P1 – Voluntary Emergency Loan Program**

This memorandum provides a review of the financial statements for the respondents of the above referenced RFP.

The RFP specifies that the respondents will provide two years of financial statements. At a minimum, financial statements are generally defined as balance sheets and statements of operations (income statements) and may include tax returns which include this data. This review is not intended to express an opinion on the financial statements, but to determine whether the proposer has met the element of responsibility. Our review is intended to disclose to the committee whether the respondent submitted all of the required financial documents as specified in the RFP and to make the committee aware of any reportable condition and/or apparent issues in the financial statements which would indicate that the firm is not capable of performing the services specified in the RFP.

Reportable conditions include negative equity, net loss, and current ratios less than 1.0. The current ratio is calculated by dividing current assets by current liabilities, with a ratio of 1.0 or higher generally indicates a firm can meet its financial obligations in a timely manner. Debt to Equity is a measure of a company's financial leverage calculated by dividing its total liabilities by stockholders' equity. This ratio provides the relative proportion of the firm's equity and debt used to finance assets. A reportable condition is not necessarily indicative of a firm's inability to perform but may be one of many factors the Committee considers in its evaluation.

There were three (3) respondents to the RFP. However, only two (2) respondents fully complied with the financial requirements of the RFP. Following are reportable conditions to be brought to the attention of the Committee:

Employee Loan Solutions, LLC – did not provide financial statements.

Attached is a spreadsheet showing selected financial data.

RFP/RLI#:	GEN2124409P1
TITLE:	Voluntary Emergency Loan Program
AGENCY:	Human Resources
PM:	Lisa Morrison
# OF RESPONDERS:	3

Responder Name: BMG Money, Inc.
Confidentiality Claim: N
Publicly Traded: N

FY Period	Financials Provided	Audited?	Revenue	Net Profit/(Loss)	Equity (E)	Curr. Assets (CA)	Curr. Liabilities (CL)	Total Assets (TA)	Total Liabilities (TL)	Debt to Equity Ratio (TL/E)[1]	Current Ratio (CA/CL)[2]
12/31/2021	Financial Statements	N	18,848,358	20,881,755	34,341,572	72,597,734	40,743,918	75,462,907	41,121,335	1.20	1.78
12/31/2020	Financial Statements	N	10,050,950	13,662,740	15,831,605	31,034,696	16,597,749	32,806,771	16,975,166	1.07	1.87

Responder Name: CreditWorks, LLC
Confidentiality Claim: Y
Publicly Traded: N

FY Period	Financials Provided	Audited?	Revenue	Net Profit/(Loss)	Equity (E)	Curr. Assets (CA)	Curr. Liabilities (CL)	Total Assets (TA)	Total Liabilities (TL)	Debt to Equity Ratio (TL/E)[1]	Current Ratio (CA/CL)[2]
12/31/2021	Financial Statements	Y				CONFIDENTIAL				(3.54)	1.20
12/31/2020	Financial Statements	N								(4.47)	1.21

Responder Name: Employee Loan Solutions, LLC
Confidentiality Claim: N
Publicly Traded: N

FY Period	Financials Provided	Audited?	Revenue	Net Profit/(Loss)	Equity (E)	Curr. Assets (CA)	Curr. Liabilities (CL)	Total Assets (TA)	Total Liabilities (TL)	Debt to Equity Ratio (TL/E)[1]	Current Ratio (CA/CL)[2]
12/31/2021					-					#DIV/0!	#DIV/0!
12/31/2020					-					#DIV/0!	#DIV/0!

[1] **Debt to Equity Ratio** The Debt to Equity Ratio is a measure of a company's financial leverage calculated by dividing its total liabilities by stockholders' equity.
It indicates the proportion of equity and debt the company is using to finance its assets.
A high debt/equity ratio generally means that a company has been aggressive in financing its growth with debt.

[2] **Current Ratio** The Current Ratio is a liquidity ratio that measures a company's ability to pay short-term obligations and is calculated by dividing current assets by current liabilities.
The higher the current ratio, the more capable the company is of paying its obligations.
A ratio under 1.0 suggests that the company would be unable to pay off its obligations if they came due at that point.

MEMORANDUM

TO:	Michael Mullen	Purchasing Agent	Sandy Steed Digitally signed by Sandy Steed Date: 2022.09.02 08:49:14 -04'00'
FROM:	Sandy Steed	County Attorney's Office	Signature/ Initials

DATE: September 2 , 20 22

RE: Litigation Review for Solicitation # GEN2124409P1 - Voluntary Emergency Loan Program

We reviewed the litigation history between Broward County and the proposing vendors. [check one of the following two boxes below]

☑ No record of litigation during the last five (5) years between Broward County and any proposing vendor for this solicitation.

☐ Litigation history with Broward County exists with one or more proposing vendor for this solicitation in last five (5) years. See details below for more information.

In addition, we reviewed the litigation disclosure forms submitted by proposing vendors regarding material case history between vendors and third parties during the last three years. [check one of the following three boxes below]

☑ No record of material case history between vendors and third parties during the last three years.

☐ Material case history exists with one or more proposing vendor and third parties for this solicitation in last three (3) years. However, based on our analysis of the applicable litigation, we do not believe it presents a concern regarding responsibility.

☐ Material case history exists with one or more proposing vendor and third parties for this solicitation in last three (3) years. Based on our analysis, one or more of these disclosed cases presents a concern regarding responsibility that should be considered by the committee.

List vendor name, filing date, applicable court, asserted claims, and status of any applicable litigation:

Finance and Administrative Services Department
RISK MANAGEMENT DIVISION
115 S Andrews Avenue, Room 218 • Fort Lauderdale, Florida 33301 • 954-357-7200 • FAX 954-357-7180

INSURANCE COMPLIANCE MEMORANDUM

September 26, 2022

TO: Michael Mullen, Purchasing Agent Senior

FROM: Colleen Pounall, Assistant Risk Manager CPounall Digitally signed by COLLEEN A. POUNALL Date: 2022.09.26 08:04:56 -04'00'

RE: GEN2124409P1 - Voluntary Emergency Loan Program

We have reviewed the proof of insurance from the proposers.

This solicitation requires proposers to either provide proof of insurance (even if the minimum limits are not met), or a letter stating that the proposer will comply with the minimum insurance requirements if awarded.

The requirements in this solicitation were:

General Liability
Automobile Liability
Workers Compensation
Cyber Liability
Professional Liability
Crime/Employee Dishonesty

Below is a summary of the compliance of the proposers:

BMG Money, Inc.	Compliant
CreditWorks, LLC	Compliant
Employee Loan Solutions, LLC	Non-Compliant (Crime)

Please advise Risk Management of any exceptions taken to the standard terms and conditions of the insurance article.

BROWARD COUNTY FLORIDA

Finance and Administrative Services Department
ENTERPRISE TECHNOLOGY SERVICES
1 North University Drive, Suite 4003A • Plantation, Florida 33324-2019 • 954-357-6512 • FAX 954-357-5601

MEMORANDUM

DATE: September 26, 2022

TO: Michael Mullen, Purchasing Agent
Purchasing Division

FROM: ETS Security and Compliance

SUBJECT: Request for Proposals (RFP) No. GEN2124409P1 - Voluntary Emergency Loan Program – Vendor Security Questionnaire Review

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This memorandum provides a summary of the review of the Vendor Security Questionnaires (VSQs) for each of the respondents of the above referenced solicitation. The VSQ's purpose is to assess each respondent's security policies and/or system protocols and to identify any security vulnerabilities. Each responder was required to complete and submit the VSQ as deemed applicable to their solution.

This review is intended to disclose to the Evaluation Committee whether the respondent submitted the VSQ as specified in the solicitation and to make the committee members aware of any apparent security issues. This review is not intended to express an opinion on the respondent's responses.

There were three (3) respondents to the solicitation. Two (2) respondents submitted the VSQ and staff reviewed same. One (1) respondent, Employee Loan Solutions LLC, did not submit a VSQ. The following comments are brought to the attention of the Evaluation Committee:

Vendor Name	Provided/ Not Provided	Comments
BMG Money, Inc.	Provided	**Section 1: Software-as-a-Service (SaaS)/Hosting/Application Development/Managed and Professional Services** **Question 9:** Does your organization have a current Service Organization Controls (SOC) [System and Organization Controls] 2 Type II report, inclusive of all five Trust Service Principles (Security, Availability, Processing Integrity, Confidentiality, and Privacy)?

		(Note: For any SaaS or hosted application, the SOC report should be for the organization or application specifically, not the datacenter only.) **Vendor Response:** No. We are in the process of being audited (by Laika) for such purpose. Our application is hosted in Google Cloud Services, which is SOC II certified. **ETS Response:** ETS established standard for SAAS/Hosted solutions and Managed or Professional Services Providers that process, store, or transmit Confidential Data requires a SOC 2, Type II report inclusive of all 5 trust service principles for the application or organization.
CreditWorks LLC	Provided	**Section 1: Software-as-a-Service (SaaS)/Hosting/Application Development/Managed and Professional Services** **Question 9:** Does your organization have a current Service Organization Controls (SOC) [System and Organization Controls] 2 Type II report, inclusive of all five Trust Service Principles (Security, Availability, Processing Integrity, Confidentiality, and Privacy)? (Note: For any SaaS or hosted application, the SOC report should be for the organization or application specifically, not the datacenter only.) **Vendor Response:** No. **ETS Response:** ETS established standard for SAAS/Hosted solutions and Managed or Professional Services Providers that process, store, or transmit Confidential Data requires a SOC 2, Type II report inclusive of all 5 trust service principles for the application or organization.

		Question 112: Does your organization periodically test your backup/restoration plan by restoring from backup media? **Vendor Response:** No. **ETS Response:** ETS established standard is to periodically test backup/restoration plan by restoring from backup media.
Employee Loan Solutions LLC	Not Provided	***On 9/7/2022, County requested completed VSQ. No response received at this time.***

Note: A System and Organization Controls 2 (SOC 2) Type II report provides assurance that an independent, third party has attested to the implementation of proper security controls. The SOC 2 Type II report provides validation for the following Trust Service Principles (TSP) determined applicable to this agreement: Confidentiality, Security, Availability, Processing Integrity and Privacy. The County's standard for Software-as-a-Service agreements is a SOC 2 Type II report for the Vendor's application.

BROWARD COUNTY FLORIDA

Broward County Board of County Commissioners

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program		
Reference For (hereinafter, "Vendor"):	BMG LOANS	
Reference Date:	08/04/2022	
Organization/Firm Providing Reference:	JACKSON HEALTH SYSTEM	
Contact Name:	RAYMOND MONTALVO	
Contract Title:	TOTAL REWARDS FINANCIAL ADMINISTRATOR	
Contact Email:	RAYMOND.MONTALVO@JHSMIAMI.ORG	
Contact Phone:	786 466-8058	
Name of Referenced Project:		
Contract Number:		
Date Range of Services Provide:	Start Date: 06/01/2013	End Date: current
Project Amount:		
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor
Would you use this Vendor again?	☑ Yes	☐ No
If you answered no to the question above, please specify below: (attach additional sheet if needed)		
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)		
PROVIDE AFFORDABLE LOANS TO JHS EMPLOYEES AND REPAY DEBT IN AFFORDABLE INSTALLMENTS		

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☑	☐
Regulatory Agency(ies):	☐	☐	☑	☐

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

*****THE SECTION BELOW IS FOR COUNTY USE ONLY*****

Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/12/2022

BROWARD COUNTY FLORIDA

Broward County Board of County Commissioners

GEN2124409P1

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program				
Reference For (hereinafter, "Vendor"):	BMG Money LoansAtWork			
Reference Date:	8/8/2022			
Organization/Firm Providing Reference:	PORT TAMPA BAY			
Contact Name:	LISA BARBER			
Contract Title:	HUMAN RESOURCE MANAGER			
Contact Email:	LBARBER@TAMPAPORT.COM			
Contact Phone:	813-905-5022			
Name of Referenced Project:				
Contract Number:				
Date Range of Services Provide:	Start Date:		End Date:	
Project Amount:				
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor		
Would you use this Vendor again?	☑ Yes	☐ No		
If you answered no to the question above, please specify below: (attach additional sheet if needed)				
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)				
Loans				
Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☑	☐
Regulatory Agency(ies):	☐	☐	☑	☐

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

*****THE SECTION BELOW IS FOR COUNTY USE ONLY*****

Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/15/2022

BROWARD COUNTY FLORIDA

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program		
Reference For (hereinafter, "Vendor"):	**BMG Money**	
Reference Date:	**08/08/2022**	
Organization/Firm Providing Reference:	**City of Hialeah**	
Contact Name:	**Elsa I. Jaramillo Velez**	
Contract Title:	**Director of Human Resources**	
Contact Email:	**ejv13196@hialeahfl.gov**	
Contact Phone:	**305-883-8050**	
Name of Referenced Project:	**N/A**	
Contract Number:	**N/A**	
Date Range of Services Provide:	Start Date: **N/A**	End Date: **N/A**
Project Amount:	**N/A**	
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor
Would you use this Vendor again?	☑ Yes	☐ No

If you answered no to the question above, please specify below: (attach additional sheet if needed)

N/A

Description of services provided by Vendor, please specify below: (attach additional sheet if needed)

Free Credit Education, Emergency Loans, Employee Financial Needs.

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☑	☐
Regulatory Agency(ies):	☐	☐	☑	☐

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

*****THE SECTION BELOW IS FOR COUNTY USE ONLY*****

Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/14/2022

Broward County Board of County Commissioners

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program				
Reference For (hereinafter, "Vendor"):	**BMG Money**			
Reference Date:	**8-8-2022**			
Organization/Firm Providing Reference:	**Miami-Dade County Employee Discount Program**			
Contact Name:	**Sara Vallazza**			
Contract Title:	**Employee Engagement Coordinator**			
Contact Email:	**flogom@miamidade.gov**			
Contact Phone:	**305-375-1389**			
Name of Referenced Project:				
Contract Number:				
Date Range of Services Provide:	Start Date:		End Date:	
Project Amount:				
Vendor's Role in Project:	☐ Prime	☐ Subconsultant/Subcontractor		
Would you use this Vendor again?	☑ Yes	☐ No		
If you answered no to the question above, please specify below: (attach additional sheet if needed)				
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)				
Assist employees with pay day loans.				
Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☐	☑
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☐	☑
Timeliness of:				
Project:	☐	☐	☐	☑
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☐	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☐	☑
Regulatory Agency(ies):	☐	☐	☐	☑

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

*****THE SECTION BELOW IS FOR COUNTY USE ONLY*****

Verified via:	☐ Email ☐ Verbal	Verified by:	County Unable to Verify	Division: Date:

From:	Vallazza, Sara (HR) <Sara.Vallazza@miamidade.gov>
Sent:	Thursday, September 29, 2022 2:54 PM
To:	Gordon, Tracey
Cc:	Mitchell, Esther; Parets, Chantel; Porto, Becsaida (HR)
Subject:	RE: Request For Vendor Reference Verification For BMG Money, Inc. for Voluntary Emergency Loan Program (GEN2124409P1)

Good afternoon,

Sorry, I have not. Actually tried someone else there just yesterday.

The BMG team participated in our 5K event on Saturday too.

I just cannot speak to any contractual performance questions.

From: Gordon, Tracey [mailto:trgordon@broward.org]
Sent: Thursday, September 29, 2022 2:42 PM
To: Vallazza, Sara (HR) <Sara.Vallazza@miamidade.gov>
Cc: Mitchell, Esther <EMITCHELL@broward.org>; Parets, Chantel <cparets@broward.org>; Porto, Becsaida (HR) <Becsaida.Porto@miamidade.gov>
Subject: RE: Request For Vendor Reference Verification For BMG Money, Inc. for Voluntary Emergency Loan Program (GEN2124409P1)

Good afternoon Ms. Vallazza:

I appreciate you responding to this inquiry. Have you received any feedback from your payroll information management division?

Thank you,

Tracey

Tracey A. Gordon
Senior Program/Project Coordinator
Human Resources Division, Employee Benefit Services
115 S. Andrews Avenue, Fort Lauderdale, FL 33301
Ph: 954-357-6726, Fax: 954-728-2777
www.broward.org/benefits

Top 5 Strengths | Strategic | Relator | Connectedness | Analytical | Developer

Have questions or need assistance with UnitedHealthcare's health or vision plans? Contact your onsite Healthcare Advocates at 954-357-7191 or 954-357-7192.

Customer Care is my priority. How am I doing? Please contact my manager, Lisa Morrison, at lmorrison@broward.org with feedback.

From: Vallazza, Sara (HR) <Sara.Vallazza@miamidade.gov>
Sent: Thursday, September 15, 2022 8:27 AM
To: Gordon, Tracey <trgordon@broward.org>
Cc: Mitchell, Esther <EMITCHELL@broward.org>; Parets, Chantel <cparets@broward.org>; Porto, Becsaida (HR) <Becsaida.Porto@miamidade.gov>
Subject: RE: Request For Vendor Reference Verification For BMG Money, Inc. for Voluntary Emergency Loan Program (GEN2124409P1)

Good morning, Ms. Gordon,

I referred the form to our payroll information management division because I do not contract with BMG Money. My role is get the information about their product and services to our workforce.

As such, I have had the opportunity to work with Carlos Ramos and Tom McCormick. I have found the team at BMG professional and accessible. They respond quickly to emails and calls. They have attended several in-person events to conduct outreach as well.

To my knowledge they have engaged with our workforce without issue. I have not received any negative feedback.

I hope this is helpful. Realize you have a deadline and I am not certain you will have the form back accordingly.

Contact me should you have other questions. I am happy to be of assistance within the limits of my experience.

Warmly, Sara

Sara Vallazza, MPA
Employee Engagement Coordinator
Benefits and Employee Support Services Division
Miami-Dade County Human Resources Department
111 NW 1st Street, 23rd floor
305.375.1389
flogom@miamidade.gov
miamidade.gov/humanresources

From: Gordon, Tracey [mailto:trgordon@broward.org]
Sent: Monday, September 12, 2022 3:02 PM
To: Vallazza, Sara (HR) <flogom@miamidade.gov>
Cc: Mitchell, Esther <EMITCHELL@broward.org>; Parets, Chantel <cparets@broward.org>
Subject: Request For Vendor Reference Verification For BMG Money, Inc. for Voluntary Emergency Loan Program (GEN2124409P1)

EMAIL RECEIVED FROM EXTERNAL SOURCE

Good afternoon Sara Vallazza:

I hope this email finds you well!

Your name and the attached Vendor Reference Verification Form was provided to us by BMG Money, Inc. as part of their response to our recent RFP for Voluntary Emergency Loan Program (GEN2124409P1).

Please confirm that you provided this reference, and complete the following:

1. Name of Reference Project
2. Contract Number
3. Date Range of Services Provided
4. Project Amount
5. Vendor's Role in Project

Your response will be greatly appreciated by 5:00 p.m. Thursday, September 15, 2022.

If you have any questions regarding this email, please let me know. Thanks so much for your time.

Respectfully,

Tracey

Tracey A. Gordon
Senior Program/Project Coordinator
Human Resources Division, Employee Benefit Services
115 S. Andrews Avenue, Fort Lauderdale, FL 33301
Ph: 954-357-6726, Fax: 954-728-2777
www.broward.org/benefits

Top 5 Strengths | Strategic | Relator | Connectedness | Analytical | Developer

Customer Care is my priority. How am I doing? Please contact my manager, Lisa Morrison, at lmorrison@broward.org with feedback.

BROWARD COUNTY FLORIDA

Broward County Board of County Commissioners

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program		
Reference For (hereinafter, "Vendor"):	CreditWorks LLC	
Reference Date:	08/08/2022D	
Organization/Firm Providing Reference:	Ochsner Clinic Foundation	
Contact Name:	Donna Prinz	
Contract Title:	VP, HR Benefits	
Contact Email:	dprinz@ochsner.org	
Contact Phone:	504-842-9667	
Name of Referenced Project:	Credit4Work! Loan Program	
Contract Number:	N/A	
Date Range of Services Provide:	Start Date: **August 2018**	End Date: **Ongoing**
Project Amount:	N/A	
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor
Would you use this Vendor again?	☑ Yes	☐ No
If you answered no to the question above, please specify below: (attach additional sheet if needed)		
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)		
Access to several different loan types via payroll deduction to support employees with debt management		

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☐	☑
Regulatory Agency(ies):	☐	☐	☐	☑

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

*****THE SECTION BELOW IS FOR COUNTY USE ONLY*****

Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/22/2022

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program			
Reference For (hereinafter, "Vendor"):	**CreditWorks LLC**		
Reference Date:	**08/08/2022**		
Organization/Firm Providing Reference:	**Ochsner LSU Health System**		
Contact Name:	**Jennifer Taffaro**		
Contract Title:	**Director, Benefits**		
Contact Email:	**jennifer.taffaro@ochsner.org**		
Contact Phone:	**504-703-0741**		
Name of Referenced Project:	**Credit4Work! Loan Program**		
Contract Number:	**N/A**		
Date Range of Services Provide:	Start Date: **June 2019**	End Date: **Ongoing**	
Project Amount:	**N/A**		
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor	
Would you use this Vendor again?	☑ Yes	☐ No	
If you answered no to the question above, please specify below: (attach additional sheet if needed)			
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)			
Access to several different loan types via payroll deduction to support employees with debt management			

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☐	☑
Regulatory Agency(ies):	☐	☐	☐	☑

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Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/12/2022

Broward County Board of County Commissioners

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program		
Reference For (hereinafter, "Vendor"):	CreditWorks LLC	
Reference Date:	08/10/2022	
Organization/Firm Providing Reference:	Lake Charles Memorial Health	
Contact Name:	Mary Matte	
Contract Title:	Human Resources Manager	
Contact Email:	mmatte@lcmh.com	
Contact Phone:	337-494-3257	
Name of Referenced Project:	Voluntary Emergency Loan Program	
Contract Number:	GEN2124409P1	
Date Range of Services Provide:	Start Date: March 2020	End Date: Ongoing
Project Amount:	n/a	
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor
Would you use this Vendor again?	☑ Yes	☐ No

If you answered no to the question above, please specify below: (attach additional sheet if needed)

Description of services provided by Vendor, please specify below: (attach additional sheet if needed)

Credit4Work! financial wellness program including personal loans without a credit check repaid through payroll deduction.

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☑	☐	☐
Accuracy:	☐	☑	☐	☐
Deliverables:	☐	☑	☐	☐
Vendor's Organization:				
Staff Expertise:	☐	☑	☐	☐
Professionalism:	☐	☑	☐	☐
Turnover:	☐	☑	☐	☐
Timeliness of:				
Project:	☐	☑	☐	☐
Deliverables:	☐	☑	☐	☐
Project completed within budget:	☐	☑	☐	☐
Cooperation with:				
Your Firm:	☐	☑	☐	☐
Subcontractor(s)/Subconsultant(s):	☐	☑	☐	☐
Regulatory Agency(ies):	☐	☑	☐	☐

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Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/12/2022

BROWARD COUNTY FLORIDA

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program			
Reference For (hereinafter, "Vendor"):	**Employee Loan Solutions LLC dba TrueConnect**		
Reference Date:	**8-6-2022**		
Organization/Firm Providing Reference:	**City of Albuquerque, NM**		
Contact Name:	**Tim Rivera**		
Contract Title:	**Senior Benefits and Insurance Director**		
Contact Email:	**timrivera@cabq.gov**		
Contact Phone:	**5057683733**		
Name of Referenced Project:	**TrueConnect**		
Contract Number:			
Date Range of Services Provide:	Start Date: **7/2017**		End Date: **Current**
Project Amount:			
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor	
Would you use this Vendor again?	☑ Yes	☐ No	
If you answered no to the question above, please specify below: (attach additional sheet if needed)			
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)			
Provides short term loans for City employees.			

Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☑	☐
Deliverables:	☐	☐	☑	☐
Project completed within budget:	☐	☐	☑	☐
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☑	☐
Regulatory Agency(ies):	☐	☐	☑	☐

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Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division: Date:	Human Resources 9/29/2022

BROWARD COUNTY FLORIDA

VENDOR REFERENCE VERIFICATION FORM

RFP No. GEN2124409P1 Voluntary Emergency Loan Program				
Reference For (hereinafter, "Vendor"):	**Employee Loan Solutions LLC dba TrueConnect**			
Reference Date:	**8-6-2022**			
Organization/Firm Providing Reference:	**City of Phoenix, AZ**			
Contact Name:	**Tristin Sullivan-Leppa**			
Contract Title:	**Deputy Human Resources Director**			
Contact Email:	**tristin.sullivan-leppa@phoenix.gov**			
Contact Phone:	**(602) 706-4777**			
Name of Referenced Project:	**TrueConnect**			
Contract Number:	**Cooperative Purchasing Agreement between the City of Phoenix an**			
Date Range of Services Provide:	Start Date: **1/2019**		End Date: **Current**	
Project Amount:	**N/A**			
Vendor's Role in Project:	☑ Prime	☐ Subconsultant/Subcontractor		
Would you use this Vendor again?	☑ Yes	☐ No		
If you answered no to the question above, please specify below: (attach additional sheet if needed)				
Description of services provided by Vendor, please specify below: (attach additional sheet if needed)				
Employee Loan Program via payroll deduction. If employee leaves the City, the employee becomes responsib				
for any loan balance. The City is not responsible for recouping unpaid loan balance at time of separation.				
Please rate your experience with the referenced Vendor via checkbox:	Needs Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service:				
Responsive:	☐	☐	☑	☐
Accuracy:	☐	☐	☑	☐
Deliverables:	☐	☐	☐	☑
Vendor's Organization:				
Staff Expertise:	☐	☐	☑	☐
Professionalism:	☐	☐	☑	☐
Turnover:	☐	☐	☑	☐
Timeliness of:				
Project:	☐	☐	☐	☑
Deliverables:	☐	☐	☐	☑
Project completed within budget:	☐	☐	☐	☑
Cooperation with:				
Your Firm:	☐	☐	☑	☐
Subcontractor(s)/Subconsultant(s):	☐	☐	☐	☑
Regulatory Agency(ies):	☐	☐	☐	☑

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Verified via:	☒ Email ☐ Verbal	Verified by:	Tracey A. Gordon	Division:	Human Resources
				Date:	9/22/2022

Contracts Central
Broward County Purchasing Division

- Contracts Central
  - Administration
    - PO Admin
  - Fixed/Open Contracts
  - Work Auth
  - Projects
  - PURCHASING
    - Procurement
    - FileRoom DashBoard
    - FileRoom Insert
    - Debarment Dashboard
  - Favorites
    - Prime Vendor
    - Sub Vendor
    - Purchase Order
    - Evaluation
  - Log Off

Prime Vendor Dashboard - **BMG MONEY, INC.**

Finish

Proj/Contract/Agreement/WA Legend: Proj Nbr: = Project Number FC Nbr: = Fixed Contract Number OE Nbr: = Open End Contract Number WA Nbr: = Work Authorization Number

Export To Excel

Final/Complete/Renewal Vendor Performance Evaluations - Past 5 Years

Proj/Contract/Agreement/WA	Using Div	Evaluation Type	Locked Dt	Future	Score		
OE Nbr: N2111734P1	Human Resources	Renewal Service Evaluation 06/30/2020 - 06/29/2021	12/6/2021	YES	4.73	View	Docs (0)

Contracts Central

Broward County Purchasing Division

- Contracts Central
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  - Favorites
    - Prime Vendor
    - Sub Vendor
    - Purchase Order
    - Evaluation
  - Log Off

Prime Vendor Dashboard

Enter Vendor Name (or a portion of) Then Click Search: - Wilcards Are Permitted (ie. wa*, *wa*,wa*inc)

CreditWorks

Search Reset Finish

No Vendors Found For Your Search. Try Again

BROWARD COUNTY FLORIDA

Contracts Central

Broward County Purchasing Division

- Contracts Central
  - Administration
    - PO Admin
  - Fixed/Open Contracts
  - Work Auth
  - Projects
  - PURCHASING
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    - Sub Vendor
    - Purchase Order
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Prime Vendor Dashboard

Enter Vendor Name (or a portion of) Then Click Search: -
Wilcards Are Permitted (ie. wa*, *wa*,wa*inc)

Employee Loan Solutions, LLC

Search Reset Finish

No Vendors Found For Your Search. Try Again