



**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 26, 2023

**TO:** Dazarene Lescott, Purchasing Agent  
Purchasing Division

**THRU:** Sandy-Michael McDonald, Director  
Office of Economic and Small Business Development  
**SANDY-MICHAEL MCDONALD**  
Digitally signed by SANDY-MICHAEL MCDONALD  
Date: 2023.10.10 14:26:52  
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**FROM:** Donna-Ann Knapp, Small Business Development Manager  
Office of Economic and Small Business Development  
**DONNA-ANN KNAPP**  
Digitally signed by DONNA-ANN KNAPP  
Date: 2023.10.06 12:04:01 -04'00'

**SUBJECT: RFP No. GEN212672Q1**  
**Library of Bond Underwriters**  
**Volume of Work & Affiliated Entities Review**  
**Active and Completed Projects - August 2018 to August 2023**

***This memorandum supersedes the previous memorandum dated September 18, 2023.***

The Purchasing Division is requesting small business subcontractors' payment data on active and completed projects from August 2018 to September 2023 by each of the respondents of RFP No. GEN212672Q1. A CBE goal was not established to this solicitation; however, as part of the evaluation criteria, the Purchasing Division 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

The Office of Economic and Small Business Development (OESBD) did not find any active or completed projects with CBE requirements within the last 5 years for the following firms:

- Bancroft Capital, LLC
- Barclays Bank US
- Blaylock Van, LLC
- KeyBanc Capital Markets LLC
- San Blas Securities, LLC
- Truist Securities
- UBS Financial Services Inc.
- Bank of America Securities, Inc.

- Estrada Hinojosa & Company, Inc.
- Citigroup Global Markets, Inc.
- Hilltop Securities, Inc.
- JP Morgan Securities LLC
- Jefferies LLC
- Loop Capital Markets, LLC
- Morgan Stanley
- Ramirez & Co. LLC
- Raymond James & Associates, Inc.
- RBC Capital Markets, LLC
- Siebert Brandford Shank & Co., LLC
- Wells Fargo Bank, N.A.

Therefore, no volume of previous payments to certified County Business Enterprises (CBEs) can be reported on these vendors.

**Performance of Affiliated Entities:**

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

- Bancroft Capital, LLC
- Barclays Bank US
- Blaylock Van, LLC
- KeyBanc Capital Markets LLC
- San Blas Securities, LLC
- Truist Securities
- UBS Financial Services Inc.
- Bank of America Securities, Inc.
- Estrada Hinojosa & Company, Inc.
- Citigroup Global Markets, Inc.
- Hilltop Securities, Inc.
- JP Morgan Securities LLC
- Jefferies LLC
- Loop Capital Markets LLC
- Morgan Stanley
- Ramirez & Co. LLC
- Raymond James & Associates, Inc.
- RBC Capital Markets, LLC
- Siebert Brandford Shank & Co., LLC
- Wells Fargo Bank, N.A.

Therefore, no volume of previous payments to certified County Business Enterprises (CBEs) can be reported on affiliated entities of principals of these firms.

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

cc: Maribel Feliciano, Assistant Director, OESBD  
Geoffrey Simmons, Small Business Development Specialist (Trainee), OESBD