

**From:** [City of Ocala - Contracting Officer](#)  
**To:** [Eileen M. Marquez](#); [Peter Brill](#)  
**Subject:** Your policy exception has been approved.  
**Date:** Monday, December 30, 2024 11:24:40 AM

Your policy exception has been **approved**.

**Approval Comments: drobinson@ocalafl.org**

This exception request is approved under the following conditions. After discussing the benchmarking provided with the Chief Financial Officer, it was determined that the benchmarking is sufficient to sustain a one-year renewal of the existing contracts with PFM, Sawgrass, and Virtus; however, in order to ensure best value, these services will be competitively solicited. The department is encouraged to begin acquisition planning processes (scope of work development, budgeting, etc.) and issue its solicitation request early to allow sufficient time for the RFP process. **YOU MAY PROCEED WITH ISSUING A REQUEST TO CONTRACTING SO THAT RENEWAL AGREEMENTS CAN BE PREPARED. PLEASE INCLUDE A COPY OF THIS EXCEPTION APPROVAL WITH YOUR REQUEST AND ENSURE IT IS UPLOADED TO MUNIS. IF THE EXPENDITURES UNDER THESE AGREEMENTS FOR THE RENEWAL TERM WILL EXCEED THE COUNCIL THRESHOLD, PLEASE SCHEDULE FOR AN UPCOMING AGENDA.**



### Procurement/Contract/P-Card Exception

Select exception type:

Procurement

Reason for procurement exception:

Policy Exception for Best Value/Approach

Enter a brief description of your exception request:

We would like to continue with the three investment management companies we currently are working with as they are the best option for the city based upon the Benchmarking attached.

Attach all documents related to the exception that can assist the Contracting Officer's decision.

[Rate Comparison - City Investments.pdf](#)  
[EM to PB FIN - 3 INVESTMENT MANAGEMENT CONTRACTS.pdf](#)

Department

(FIN) FINANCE

Requestor Name

Karen Czechowicz

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<b>Who authorized requesting this exception?</b>	Peter Brill