

RFP No. 5854 Professional Auditing Services

Summary Evaluation Matrix

Sr. Buyer - Cynthia Perez

Proposal Evaluation	Score	Abip	Carr Riggs Ingram	Crowe LLP	Macias Gini O Connell	RSM US LLP	Weaver	Whitley Penn
Minimum Qualifications								
Three Certified Public Accountants (CPA) employed by the firm to handle the audit	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Affiliation with nationwide association of CPA firm	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Three current municipal/local government audit clients; two of which are comparable to the City of Corpus Christi in size, complexity, and same number of types of funds	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
At least one former client in the past five years that has applied for and received the GFOA Certificate of Achievement for Excellence in Financial Reporting that has a General Fund budget of at least \$500 million and Enterprise Funds with revenues of at least \$150 million	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Fail
One current or former client with grant expenditures of at least \$20 million on the Schedule of Federal/State Expenditures during which they were Proposer's client	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Required five years in business	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
No outstanding lawsuits during the last five years or current litigation with the City during last five years	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
No outstanding regulatory issues in the last five years	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
References provided for firm	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Subtotal Minimum Qualifications	Pass/Fail	Pass	Pass	Pass	Pass	Pass	Pass	Fail
Local Preference								
Points	10	0.0	0.0	0.0	0.0	0.0	0.0	N/A
Subtotal Local Preference	10	0	2	0	0	0	0	N/A
Technical Proposals								
Firms' Experience	13	9.5	9.1	8.5	10.2	8.5	12.6	N/A
Teams' Experience	13	10.1	9.8	9.4	9.4	9.1	12.4	N/A
Understanding of Project Scope	14	11.2	10.2	10.5	10.9	10.9	13.3	N/A
Subtotal Technical Proposal	40	30.8	29.0	28.4	30.5	28.4	38.2	N/A
Competitive Range Subtotal	50	30.8	29.0	28.4	30.5	28.4	38.2	N/A
Interview								
Firms' Experience	10	6.5	0.0	0.0	9.0	0.0	9.5	N/A
Team Identification	10	5.5	0.0	0.0	8.5	0.0	9.5	N/A
Understanding of Project Scope	10	6.0	0.0	0.0	7.6	0.0	9.3	N/A
Subtotal Interview	30	18.0	0.0	0.0	25.1	0.0	28.3	
Pricing								
Points	20	20.0	19.8	19.8	17.0	16.6	19.2	N/A
Subtotal Pricing	20	20.0	19.8	19.8	17.0	16.6	19.2	
Total	100	68.8	48.8	48.2	72.6	45.0	85.7	N/A