

**RFP No. 1975 - Professional Auditing Services**

## Summary Evaluation Matrix

Proposal Evaluation	Belt Harris Pechacek, LLLP	BKD, LLP	Carr, Riggs & Ingram, LLC	RSM US, LLP	Weaver and Tidwell, LLP
<b>Minimum Qualifications</b>	<b>Fail</b>	<b>Pass</b>	<b>Pass</b>	<b>Fail</b>	<b>Pass</b>
Three Certified Public Accountants (CPA) employed by the firm to handle the audit; provide list of names with CPA license numbers	Pass	Pass	Pass	Fail	Pass
Affiliation with nationwide association of CPA firms; provide list and explanation	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 number of types of funds; provide list with contact names and phone numbers	Fail	Pass	Pass	Pass	Pass
One former client in the past five years which received GFOA Certificate of Achievement for Excellence in Financial Reporting Program with at least \$500 million in the certificate application; provide list with year, contact name and phone number	Pass	Pass	Pass	Fail	Pass
One current or former client with grant expenditures of at least \$20 million on the Schedule of Federal/State Expenditures; provide list with year, contact name and phone number	Pass	Pass	Pass	Fail	Pass
Required five years in business	Pass	Pass	Pass	Pass	Pass
No outstanding lawsuits during last 5 years or current litigation with the City during last 5 years	Pass	Pass	Pass	Pass	Pass
No outstanding regulatory issues last 5 years	Pass	Pass	Pass	Pass	Pass
References Provided for firm	Pass	Pass	Pass	Pass	Pass
<b>Technical Proposal</b>					
<i>Technical Proposal (50 points)</i>	<i>0</i>	<i>41</i>	<i>38</i>	<i>0</i>	<i>48</i>
Firms' Experience (18 points)					
Team Experience (18 points)					
Understanding of Project Scope (14 points)					
<b>Interview</b>					
<i>Interview (30 points)</i>	<i>0</i>	<i>24</i>	<i>22</i>	<i>0</i>	<i>29</i>
Firms' Experience (8 points)					
Team Identification (10 points)					
Understanding of Project Scope (12 points)					
<b>Price</b>					
<i>Price (20 points)</i>	<i>0</i>	<i>17</i>	<i>20</i>	<i>0</i>	<i>19</i>
<b>Total</b>	<b>0</b>	<b>82</b>	<b>80</b>	<b>0</b>	<b>96</b>