

Financial Auditing Services Request for Proposals

RFP # 18-10162L.01

Reagan Walker, Director, Administrative Services
Governing Board – September 12, 2018



Background



- Current auditor no longer providing governmental services (MBAF - Morrison, Brown, Argiz & Farra)
- Advertised RFP for Financial Auditing Services on July 29, 2018
- District received five (5) responsive proposals
 - Caler, Donten, Levine
 - Grau & Associates
 - Mauldin & Jenkins
 - Nowlen, Holt & Miner, PA
 - Templeton & Company

RFP Evaluation



- Selection Committee
 - Jeffrey P. Phipps, Sr. (Board Supervisor)
 - Debbie Diaz (Principal, MBAF)
 - Karen Hoyt (Director of Finance)
- Ranking Criteria
 - General Government Audit Experience (0-10 pts)
 - Special District Audit Experience (0-25 pts)
 - Qualifications of Individuals Assigned to Audit (0-20 pts)
 - Demonstrated Understanding of Requirements (0-10 pts)
 - Audit Approach (0-15 pts)

Ranked Firms



1. Grau & Associates (232 pts)
2. Nowlen, Holt & Miner (224 pts)
3. Caler, Donten, Levine (209 pts)
3. Mauldin & Jenkins (209 pts)
4. Templeton & Company (194)

Recommendation



- Approval of ranking of qualified firms
- Authorization to enter into contract negotiations with the top-ranked firm – Grau & Associates
- Final contract to be presented for board approval at October 2018 Board meeting