

# Memorandum



CITY OF DALLAS

DATE April 3, 2015

TO Members of the Budget, Finance & Audit Committee: Jerry R. Allen (Chair), Jennifer S. Gates (Vice Chair), Tennell Atkins, Sheffie Kadane, Philip T. Kingston

SUBJECT Upcoming Proposer Presentations: External Auditing Services

On January 20, 2015, the Budget, Finance and Audit Committee was briefed on the Request for Competitive Sealed Proposal (RFCSP) for External Auditing Services. In response to the RFCSP, five firms submitted proposals:

- BKD CPA's & Advisors
- Crowe Horwath
- Grant Thornton
- KPMG, LLP
- McConnell & Jones/Banks, Finley, White & Co. (a joint venture)

Each of the five firms will be allotted 10 minutes for oral presentations and 5 minutes for questions from the Committee on April 20, 2015. In anticipation of this meeting, committee members will be provided with the proposals submitted by the firms and a ranking form.

The ranking form includes three criteria from the RFCSP for consideration: prior governmental auditing experience, audit approach, and qualifications of the staff to be assigned to the audit. Sub-criteria have been added to provide more detailed context for the criteria. Business Inclusion and Development (BID) and Fees will be ranked by Business Development and Procurement Services (BDPS) independent of your review.

Upon completion of the presentations, please rank the firms according to each of the three criteria categories, with "1" being the highest ranking and "5" being the lowest. Sign and date the form and submit the completed ranking form to Mike Frosch, Director of BDPS, by April 24, 2015. BDPS will combine each of the firms' average rankings in these three categories with the BID and Fees scores to determine the recommended proposer.

The final results will be presented to the Committee on the May 18, 2015 agenda and scheduled for City Council approval on the June 10, 2015 agenda.

Please let me know if you need additional information.

  
Jeanne Chipperfield  
Chief Financial Officer

Attachment

c: Honorable Mayor and Members of City Council  
A.C. Gonzalez, City Manager  
Warren M.S. Ernst, City Attorney  
Craig D. Kinton, City Auditor  
Rosa A. Rios, City Secretary  
Daniel F. Solis, Administrative Judge  
Ryan S. Evans, First Assistant City Manager

Jill A. Jordan, P.E., Assistant City Manager  
Joey Zapata, Assistant City Manager  
Mark McDaniel, Assistant City Manager  
Eric D. Campbell, Assistant City Manager  
Sana Syed, Public Information Officer  
Elsa Cantu, Assistant to the City Manager

# Request for Competitive Sealed Proposals BKZ1517-Auditing Services Ranking Form

INSTRUCTIONS: Please rank each proposer in the boxes provided below in regard to the evaluation criteria. Ranking will consist of 1-5 with 1 being the highest and 5 being the lowest.

EVALUATION CATEGORY	BKD CPA's & Advisors	Crowe Horwath	Grant Thornton	KPMG	McConnell & Jones
<b>Prior Governmental Auditing Experience</b>					
-Current governmental clients -Experience in comparable audits and single audits					
<b>Audit Approach</b>					
-Extent of City staff utilization during engagement -Reasonableness of audit timetable -Reasonableness of audit hours -Adequacy of sampling techniques and analytical procedures					
<b>Qualifications of staff to be assigned to the audit</b>					
Quality assurance review-unqualified opinion Extent of continuing education received by staff -Size of local office -Extent of on-site staff experience -Electronic data processing audits -Participation in municipal leagues and associations					
Business Inclusion and Development (B.I.D.) and Fees	To be ranked by Business Development and Procurement Services.				

Council Member \_\_\_\_\_

Council Member Signature \_\_\_\_\_

Date \_\_\_\_\_