



MEMORANDUM
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THE PLANNING COUNCIL AND METROPOLITAN PLANNING ORGANIZATION FOR PINELLAS COUNTY

TO: Forward Pinellas Board
Whit Blanton, FAICP, Executive Director
All Proposers

FROM: Sarah Caper, AICP, Principal Planner

DATE: July 6, 2020

SUBJECT: Procurement by Competitive Proposals, #20-03 Forward Pinellas Audit Services

In May 2020, the Forward Pinellas board approved Procurement #20-03 Forward Pinellas Audit Services. Proposals were due on June 15, 2020, by 1 p.m. via electronic or paper submittal. A total of seven proposals were received by the due date and time.

On June 30, 2020, a virtual selection committee meeting was held. Notice was provided to all proposers and was on the Forward Pinellas website. Members of the public were welcome to attend. The selection committee of Mayor Joanne “Cookie” Kennedy (Forward Pinellas Treasurer), Debbie Leous (PSTA), Julie Lupis (PSTA) and John Ondrovic (Pinellas County) met to discuss and evaluate the proposals and conduct a pricing analysis. Forward Pinellas financial staff members Joann Jacobs and Rebecca Stysly were available and participated as advisors to the selection committee.

The selection committee members discussed each proposal individually, scoring the proposal and then discussing and scoring the next proposal. The following is a brief review of each proposal.

- **Cherry Bekaert.** In depth audit work plan, concerns about personnel, did not mention Single Audit experience, well defined focus and step by step approach
- **CRI.** Good summary and detail on understanding scope of services, well outlined approach, missing information related to the timeline of services
- **CS+L.** Detailed approach, included post COVID-19 alternative, strong communications approach, questions on schedule
- **EFPR Group.** Questions on relevant experience, lacking approach detail and unclear if understand MPO/PPC
- **Mauldin & Jenkins.** Lack of clarity regarding scope of services, concerns regarding price
- **MSL.** Liked IT review and electronic options, strong audit process and single audit experience, lacking discussion of understanding requested services
- **RG&Co.** Certified MBE with good experience, questions regarding pricing and single audit

Once all proposals were discussed, the selection committee reviewed pricing information to decide if the general pricing provided was fair and reasonable, with the understanding that the rates are subject to change during the negotiation process. Generally, the selection committee felt the pricing was consistent and reflected market values though there were concerns that if single audits or major programs needed to be added to some of the prices there could be significant increases.

The scoring for the firms is provided below. This was confirmed following the meeting with the signed selection committee evaluation forms.

The selection committee recommends negotiating an agreement with the top ranked firm, followed by the next ranking firm, contingent upon checking with references to ensure positive references with no negative references. Following the selection committee meeting, staff followed up with references for the top two ranked firms and found only positive references with no negative comments, though not all reference requests were returned. Each firm had at least two references returned. Based on the costs listed in the proposals, it is anticipated that the combined cost for audit services for the MPO and PPC will not exceed \$37,000 a year.

| Firm | Score |
|-------------------|--------------|
| RG&Co | 335 |
| CS+L | 316 |
| CRI | 311 |
| MSL | 308 |
| Cherry Bekaert | 307 |
| Mauldin & Jenkins | 288 |
| EFPR Group | 285 |