

REQUEST FOR PROPOSAL NO.04C-001H - RFP FOR PREQUALIFICATION OF CPA FIRMS

DATE: March 17, 2006

PRESENTED TO BOARD: April 19, 2006

CONTRACT PERIOD: October 16, 2006 through October 15, 2007

DEPARTMENT: 9104 FUNCTION: 7115 OBJECT: 3101 FUND: 0100

FUNDING SOURCE: Operating Budget

REQUESTING DEPARTMENT: District Auditor

FINANCIAL IMPACT

The existing budget is sufficient to cover this contract extension.

To date, no purchase orders have been issued.

CONTRACT RENEWAL

Request for Proposal No.04C-001H was awarded by Board action on April 19, 2003, to Cherry, Bekaert & Holland, LLP, Harvey, Branker & Associates, McGladrey & Pullen, LLP, Rachlin Cohen & Holtz, LLP, S. Davis & Associates, P.A., for three year(s) from October 16, 2003 through October 15, 2006, with the option to renew for two additional one-year periods.

The first option to renew is being exercised for the period October 16, 2006 through October 15, 2007.

Cherry, Beakaert & Holland, LLP, Harvey, Branker & Associates, McGladrey & Pullen, LLP, S. Davis & Associates have agreed to honor terms, conditions and pricing of existing contract for the forthcoming contract period. Rachlin Cohen & Holtz, LLP, has chosen not to renew.

Services to be provided include internal audit assignments as determined by the Audit Committee with input provided by the District Auditor's Office.

RECOMMENDATION: Based on satisfactory performance during the past contract period, it is recommended that the RFP for Prequalification of CPA Firms be renewed with Cherry, Bekaert & Holland, LLP, Harvey, Branker & Associates, McGladrey & Pullen, LLP, S. Davis & Associates, P.A., for the period October 16, 2006 through October 15, 2007.

Note: Original RFP document is available upon request.

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REQUEST FOR PROPOSAL NO. - 04C-001H - PREQUALIFICATION OF CPA FIRMS

DATE:	September 8, 2003	DATE ADVERTISED:	July 24, 2003
DATE SOLICITED:	July 24, 2003	DATE OPENED:	August 26, 2003
PRESENTED TO BOARD:	October 15, 2003	DATE POSTED:	September 10, 2003

CONTRACT PERIOD: October 16, 2003 through October 15, 2006
 DEPARTMENT: 9104 FUNCTION: 7115 OBJECT: 3101 FUND: 0100
 FUNDING SOURCE: Operating Budget - Consultants
 REQUESTING DEPARTMENT: District Auditor
 31 RFPs Solicited, 10 Responses (10 RFPs, 0 No Proposal) 21 No Response
 9 M/WBEs Solicited, 6 M/WBE Responses (6 RFPs, 0 No RFPs) 3 M/WBE No Response

FINANCIAL IMPACT
The financial impact to the General Fund budget is estimated at \$300,000. The source of funds is the District Auditor's budget.
This is a new bid

Services to be provided include internal audit assignments as determined by the Audit Committee with input provided by the District Auditor's Office.

VENDOR	MINORITY STATUS	POINTS AWARDED
Bray, Beck & Koetter, CPA, P.A.	---	64
Carr, Riggs, & Ingram, LLP	---	57
Cherry, Bekaert & Holland, LLP	---	73
Evelyn F. Parkes, CPA, P.A.	6	52
Harvey, Branker & Associates	2	70
McGladrey & Pullen, LLP	6	80
Nowlen, Holt & Miner, P.A.	2	65
Rachlin Cohen & Holtz LLP	2	84
S. Davis & Associates, P.A.	2	71
Siegelaub, Lieberman & Associates, P.A.	---	53

LEGEND:

_____ = Award

() = Reject

MINORITY - (2-Black, 3-Hispanic, 4-Indian/Alaska, 5-Asian, 6-Women, 7-Disabled, 8-Other)

RECOMMENDATION: I recommend contract award be made to the five highest rated responsive , responsible proposers based on the evaluation criteria outlined in the RFP.

Note: Original RFP / Bid document is available upon request.

RFP PROTEST

Failure to file a protest within the time prescribed in §120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes and applicable Board rules, regulations and policies. Offers from the vendors listed herein are the only offers received timely as of the above opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late.

If a proposer wishes to protest a RFP, they must do so in strict accordance with the procedures outlined in FS 120.57(3). Any person who files an action protesting a decision or intended decision pertaining to this RFP pursuant to FS 120.57(3)(b), shall post with the Purchasing Department, at the time of filing the formal written protest, a bond secured by an acceptable surety company in Florida payable to the School District of Palm Beach County in an amount equal to 1 percent (1%) of the total estimated contract value, but not less than \$500 nor more than \$5,000. Bond shall be conditioned upon the payment of all costs that may be adjudged against the protester in the administrative hearing in which the action is brought and in any subsequent appellate court proceeding. In lieu of a bond, a cashier's check, certified bank check, bank certified company check or money order will be acceptable form of security. If, after completion of the administrative hearing process and any appellate court proceedings, the District prevails, it shall recover all costs and charges included in the final order of judgment, including charges by the Division of Administrative Hearings. Upon payment of such costs and charges by the protester, the protest security shall be returned. If the protest prevails, he or she shall recover from the District all costs and charges, which shall be included in the final order of judgment.

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SCORES

RFP 04C-001H REQUEST FOR PROPOSAL FOR PREQUALIFICATION OF CPA FIRMS					
Evaluation Criteria	Bray, Beck & Koetter, CPA P.A.	Carr, Riggs & Ingram, LLP	Cherry Bekaert & Holland, LLP	Evelyn F. Parkes CPA, P.A.	Harvey, Branke & Associates
1. Experience and Qualifications of the Firm (Points Available: 60)	40	40	50	20	30
2. Cost of Services (Points Available: 30)	24	17	23	22	30
3. Minority/Women Business Participation (Points Available: 10)	0	0	0	10	10
GRAND TOTAL	64	57	73	52	70

SCORES

RFP 04C-001H
REQUEST FOR PROPOSAL FOR PREQUALIFICATION OF CPA FIRMS

Evaluation Criteria	McGladrey & Pullen, LLP	Nowlen, Holt & Miner, P. A.	Rachlin Cohen & Holtz LLP	S. Davis & Associates, P.A.	Siegelaub, Lieberman & Associates, P.A.
1. Experience and Qualifications of the Firm (Points Available: 60)	50	30	55	51	30
2. Cost of Services (Points Available: 30)	20	25	19	10	23
3. Minority/Women Business Participation (Points Available: 10)	10	10	10	10	0
GRAND TOTAL	80	65	84	71	53