

Purchasing Department

Sam J. Aiello, C.P.M.
Purchasing Agent



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Honorable Mayor John Dickert and the
Members of the Common Council
730 Washington Avenue
Racine, WI 53403

September 13, 2011

Ladies and Gentlemen:

I am requesting permission to appear before the Finance and Personnel Committee to discuss the results of Official Notice #13, REQUEST FOR PROPOSAL, AUDIT SERVICES. This proposal was opened in the office of the Purchasing Agent at 10:00 A.M. on September 2, 2011.

We sent four (4) bid packages out and received three responses. The responses were from Schenk, SC, Baker Tilly Virchow Krause, LLP, and Clifton Gunderson, LLP.

The Request for Proposals technique is frequently used by the City when bidding for services as opposed to bidding for goods.

The evaluation criteria for this RFP and their respective weights were; Qualifications and Experience, 40%, Audit Approach, 10%, Completeness of Response, 15%, References, 15%, and Cost, 20%.

The evaluation committee for this RFP consisted of David Brown, Finance Director, Kathleen Fischer, Assistant Finance Director, and Joy Hansche, Accountant. The Purchasing Agent attended the evaluation meeting and acted as a moderator and facilitator. The Purchasing Agent was not a voting member of the evaluation committee. I have attached a copy of the evaluation matrix that was used to score the proposals.

Based on the scoring of this RFP the evaluation committee is recommending that a contract be entered into with Baker Tilly Virchow Krause for a five (5) year term beginning in 2012 with the option of two (2) one year extensions.

Funds for this expenditure are available in account 101.191.5600, Audit Fees.

Respectfully Submitted,

A handwritten signature in black ink, appearing to read "S. Aiello", written over a light blue horizontal line.

Sam J. Aiello
Purchasing Agent

cc: Mr. David Brown
Ms. Kathleen Fischer
Ms. Joy Hansche

City of Racine
 Audit Services RFP
 Evaluation Matrix

Total Points Available 20

Cost Calculation

	SCHENK, SC	BAKER TILLY	CLIFTON
First Year	56,750.00	77,900.00	72,525.00
Second Year	58,200.00	77,900.00	74,475.00
Third Year	59,800.00	77,900.00	77,325.00
Fourth Year	61,400.00	79,500.00	79,815.00
Fifth Year	63,000.00	81,000.00	82,305.00
Total	299,150.00	394,200.00	386,445.00
5 Year Average	59,830.00	78,840.00	77,289.00
Points Per Cost	20	15.18	15.48
% of low bid	100.00%	75.89%	77.41%

City of Racine
REQUEST FOR PROPOSAL, AUDIT SERVICES

Evaluation Matrix

September 12, 2011, 9:30 A.M.

	SCHENK, SC	BAKER TILLY VIRCHOW KRAUSE, LLP	CLIFTON GUNDERSON, LLP
<u>1. Qualifications and Experience</u>			
#1 K. Fischer	30	40	28
#2 D. Brown	25	40	30
#3 J. Hansche	35	40	32
<i>Total Points</i>	<u>90</u>	<u>120</u>	<u>90</u>
<i>Average</i>	30.00	40.00	30.00
<u>2. Audit Approach</u>			
#1 K. Fischer	8	10	5
#2 D. Brown	7	10	5
#3 J. Hansche	7	10	5
<i>Total Points</i>	<u>22</u>	<u>30</u>	<u>15</u>
<i>Average</i>	7.33	10.00	5.00
<u>3. Completeness of Response</u>			
#1 K. Fischer	15	14	13
#2 D. Brown	14	15	13
#3 J. Hansche	15	14	13
<i>Total Points</i>	<u>44</u>	<u>43</u>	<u>39</u>
<i>Average</i>	14.67	14.33	13.00
<u>4. References</u>			
#1 K. Fischer	10	15	7
#2 D. Brown	10	15	5
#3 J. Hansche	14	15	12
<i>Total Points</i>	<u>34</u>	<u>45</u>	<u>24</u>
<i>Average</i>	11.33	15.00	8.00
<u>4. Cost</u>			
<i>Total Points</i>	<u>20</u>	15.18	15.48
Total Points	83.33	94.51	71.48