



AUDITOR RFQ: EVALUATION WORKSHEET

July 15, 2019

This worksheet is to be used to document the District's evaluation of the interested accounting firms' qualifications. Points within the ranges specified are to be assigned to the below-listed criteria as a means for quantifying the relative strengths and weaknesses of the various qualifications.

In the event that oral interviews are necessary to break a tie or for making final clarification in the evaluation process, additional points may be awarded. *It should be understood that while the total score is a significant factor, the requester of the services reserves the right to consider other factors in making a final selection.*

PROFESSIONAL QUALIFICATIONS

The evaluation of professional qualifications of the interested accounting firms will be based on the following criteria:

EB	PB&H
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I. Mandatory Criteria

Qualifications will not be considered for further evaluation unless there is compliance with all of the following criteria. The interested accounting firm/individual:

- A. Must be an independent auditor properly licensed for public practice.
- B. Must meet the independence standards of Government Auditing Standards, United States GAO.
- C. Must not have a record of substandard work.
- D. Must submit a proposal meeting all of the requirements of the Request for Qualifications.

OK	OK
OK	OK
OK	OK
OK	OK

II. Technical Criteria - Points to be awarded are in parentheses ()

Those that have met each of the criteria in Section I above will be evaluated on the following criteria:

A. Technical experience of the firm:

- 1. Auditing experience in Texas public schools (0-15 points).
- 2. Auditing experience in other government entities (0-5 points)

13	13
5	1

B. Characteristics of the staff, including consultants to be assigned to the audit:

- 1. Size and structure of the firm, including audit staff positions (0-5 points)
- 2. Qualifications of supervisory personnel, consultants, and the field audit team (0-20 points)
 - Education, including continuing education courses taken during the past two years (5 pts: CPE hours)
 - Years and types of experience (Assume 7.5 pts for Years of Experience, and 7.5 pts for District size)

5	3
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5	5
15	14

- 3. General direction and supervision to be exercised over the audit team by the firm's management personnel (0-15 points)

15	15
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C. Clear understanding of the work to be performed:

- 1. Comprehensiveness of the audit work plan (0-5 points)
- 2. Realistic time estimates of major segment of the work plan, with hours by staff level, including consultants (0-10)

5	4
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10	10
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Total Technical Points: Maximum of 75 points

73	65
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III. Oral Interviews (if necessary)

Interview (0-15 points)

0	0
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IV. Comments of prior audit clients (25 points)

23	20
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Total score

96	85
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