



Legislation Details (With Text)

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On agenda: 10/13/2020 **Final action:** 10/13/2020

Title: Authorize a five-year professional services contract for auditing and non-auditing services for the City Auditor's Office - Baker Tilly US, LLP in the estimated amount of \$875,000 and Weaver and Tidwell, L.L.P. in the estimated amount of \$875,000, most advantageous proposers of fifteen - Total estimated amount of \$1,750,000 - Financing: General Fund

Sponsors:

Indexes: 100

Code sections:

Attachments: 1. Resolution

Date	Ver.	Action By	Action	Result
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STRATEGIC PRIORITY: Government Performance and Financial Management

AGENDA DATE: October 13, 2020

COUNCIL DISTRICT(S): All

DEPARTMENT: Office of Procurement Services

EXECUTIVE: Elizabeth Reich

SUBJECT

Authorize a five-year professional services contract for auditing and non-auditing services for the City Auditor's Office - Baker Tilly US, LLP in the estimated amount of \$875,000 and Weaver and Tidwell, L.L.P. in the estimated amount of \$875,000, most advantageous proposers of fifteen - Total estimated amount of \$1,750,000 - Financing: General Fund

BACKGROUND

This action does not encumber funds; the purpose of a professional services contract is to establish firm pricing for services for a specific term, which are ordered on an as needed basis according to annual budgetary appropriations. The estimated amount is intended as guidance rather than a cap on spending under the agreement, so that actual need combined with the amount budgeted will determine the amount spent under this agreement.

This professional services contract will assist the City Auditor's Office in completing the Annual Audit Work Plan. This is to be accomplished by co-sourcing the performance of auditing or non-audit services engagements from initial planning through a final report or aiding the City Auditor's Office

staff with various tasks related to audit or non-audit services assignments. Also, contractors may be requested to serve in an advisory role to assist the City Auditor’s Office in conducting audits whereby special expertise is needed for a given audit subject.

A four-member committee from the following departments reviewed and evaluated the proposals:

- City Auditor’s Office (2)
- Employee Retirement Fund (1)
- Office of Economic Development Business Workforce and Inclusion Division (1)*

*The Office of Economic Development Business Workforce and Inclusion Division only evaluated the Business Inclusion and Development Policy.

The committee selected the successful respondent on the basis of demonstrated competence and qualifications under the following criteria:

- Capability and expertise 60 points
- Approach and methodology 25 points
- Business Inclusion and Development Policy 15 points

As part of the solicitation process and in an effort to increase competition, the Office of Procurement Services used its procurement system to send out email notifications to vendors registered under relevant commodity codes. To further increase competition, the Office of Procurement Services uses historical solicitation information, the Internet, and vendor contact information obtained from user departments to contact additional vendors. Additionally, in an effort to secure more competition, the Office of Economic Development Business Workforce and Inclusion Division sent notifications to chambers of commerce and advocacy groups to ensure maximum vendor outreach.

PRIOR ACTION/REVIEW (COUNCIL, BOARDS, COMMISSIONS)

This item has no prior action.

FISCAL INFORMATION

Fund	FY 2021	FY 2022	Future Years
General Fund	\$350,000.00	\$350,000.00	\$1,050,000.00

M/WBE INFORMATION

In accordance with the City’s Business Inclusion and Development Policy adopted on September 23, 2020, by Resolution No. 20-1430, as amended, the M/WBE participation on this contract is as follows:

Contract Amount	Category	M/WBE Goal	M/WBE %	M/WBE \$
\$1,750,000.00	Professional Services	36.30%	37.25%	\$651,875.00
• This contract exceeds the M/WBE goal.				
• Baker Tilly US, LLP - Local; Workforce - 9.74% Local				
• Weaver and Tidwell, L.L.P. - Local; Workforce - 40.58% Local				

PROCUREMENT INFORMATION

Method of Evaluation for Award Type:

Request for Qualifications	<ul style="list-style-type: none"> • Utilized for professional, personal, revenue, and planning services • Recommended offeror is the responsible offeror whose proposal most closely meets established criteria for the services advertised, based on demonstrated competence and qualifications at a fair and reasonable price • Always involves the evaluation by committee • Allows for negotiation on contract terms, including price
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The Office of Procurement Services received the following proposals from solicitation number BWZ20-00012942. We opened them on June 18, 2020. We recommend the City Council award this professional services contract in its entirety to the most advantageous proposers.

*Denotes successful proposers

<u>Proposers</u>	<u>Address</u>	<u>Score</u>
*Baker Tilly US, LLP	4849 Greenville Ave. Suite 1250 Dallas, TX 75206	96.33
*Weaver and Tidwell, L.L.P.	2300 North Field St. Suite 1000 Dallas, TX 75201	95.33
McConnell & Jones, LLP	4828 Loop Central Dr. Suite 1000 Houston, TX 77081	94.67
CliftonLarsonAllen, LLP	5001 Spring Valley Rd. Suite 600W Dallas, TX 75244	91.00
Crowe, LLP	750 North Saint Paul St. Suite 850 Dallas, TX 75201	89.33
BDO USA	4116 Edith Ct. Dallas, TX 75220	84.33
MGT of America Consulting, LLC	4320 West Kennedy Blvd. Tampa, FL 33609	81.67
BKD, LLP	14241 Dallas Pkwy. Suite 1100	79.00

	Dallas, TX 75254	
Eide Bailly	400 Pine St. Suite 600 Abilene, TX 79601	75.67
CBIZ Risk & Advisory Services, LLC	4851 Lyndon B Johnson Fwy. Suite 800 Dallas, TX 75244	64.00
Whitley Penn	8343 Douglas Ave. Suite 400 Dallas, TX 75225	60.67
Protiviti, Inc.	13727 Noel Rd. Suite 800 Dallas, TX 75240	58.67
The Bonadio Group	171 Sully's Trl. Pittsford, NY 14534	56.33
65th North Group	3100 West Ray Rd. Suite #201 Chandler, AZ 85226	37.33
Bracane Company	1201 West 15th St. Suite 330 Plano, TX 75075	34.67

OWNERS

Baker Tilly US, LLP

Alan Whitman, Chief Executive Officer
Charles Droege, Chief Operating Officer

Weaver and Tidwell, L.L.P.

John Mackel, Chief Executive Officer
David Rook, Chief Operating Officer