

PROFESSIONAL SERVICES

SERVICE: *Financial Auditing Services*

SERVICE DESCRIPTION: Provide financial auditing services for all funds of the City's reporting entity, a Single Audit Report of the City's federal grant programs, an AB 2766 Audit relating to the City's Air Quality Fund, and an audit of the West Orange County Water Board (WOCWB), a fiduciary fund of the City of Huntington Beach.

VENDOR: Davis Farr LLP

OVERALL RANKING: 1

SUBJECT MATTER EXPERTS/RATERS: 1. *Finance Manager - Accounting* 2. *Public Works Project Manager* 3. *Fire Senior Administrative Analyst*

I. MINIMUM QUALIFICATIONS REVIEW

- Written Proposal Score: 1,295.5

Davis Farr, LLP – Minimum Qualifications Review		
<u>Criteria</u>	<u>Total Weighted Score</u>	<u>Maximum Score</u>
<i>Proposal Clarity</i>	55	75
<i>Firm Qualifications</i>	350	375
<i>Staffing/Experience</i>	325	375
<i>Understanding/Methodology</i>	260	300
<i>Cost</i>	175.5	225
<i>References</i>	130	150
<i>Local Vendor (bonus)</i>	0	15
Total	1,295.5	1,515

II. DUE DILIGENCE REVIEW

- Proposal Ranking: 1

Davis Farr LLP – Summary of Review	
<ul style="list-style-type: none">• <i>Leader in local government sector auditing throughout Southern California servicing approximately 60 local, state, and federal government entities.</i>• <i>Highly qualified: experience auditing governmental entities for over 30 years.</i>• <i>Serves on the Government Accounting and Audit Committee of the Cal CPA Society and are frequent speakers on technical topics at conferences and training events in California.</i>• <i>Provides an annual Governmental Accounting Standards Board (GASB) Technical Update for clients.</i>• <i>References from the cities of Mission Viejo, Carlsbad, Garden Grove, and Rancho Santa Margarita.</i>	

Davis Farr LLP – Pricing	
<ul style="list-style-type: none">• <i>Pricing of \$151,120 is competitive (third lowest of eight proposals submitted)</i>	

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VENDOR: Vendor #2

OVERALL RANKING: 2

SUBJECT MATTER EXPERTS/RATERS: 1. *Finance Manager - Accounting* 2. *Public Works Project Manager* 3. *Fire Senior Administrative Analyst*

I. MINIMUM QUALIFICATIONS REVIEW

- Written Proposal Score: 1,125.5

Vendor #2 – Minimum Qualifications Review		
<u>Criteria</u>	<u>Total Weighted Score</u>	<u>Maximum Score</u>
<i>Proposal Clarity</i>	55	75
<i>Firm Qualifications</i>	312.5	375
<i>Staffing/Experience</i>	312.5	375
<i>Understanding/Methodology</i>	220	300
<i>Cost</i>	100.5	225
<i>References</i>	125	150
<i>Local Vendor (bonus)</i>	0	15
Total	1,125.5	1,515

II. DUE DILIGENCE REVIEW

- Proposal Ranking: 2

Vendor #2 – Summary of Review
<ul style="list-style-type: none">• <i>Firm specializes in Governmental Audits and related services.</i>• <i>Strong experience in audits of local governments as well as experience with preparation of Comprehensive Annual Financial Reports and assistance with the implementation of new GASB Pronouncements.</i>• <i>Partners in the firm are members of the State Governmental Accounting and Auditing Committee and firm personnel engage in public speaking events for Southern California CSMFO chapter meetings.</i>• <i>References from the cities of Fountain Valley, Santa Ana, Tustin, and Westminster.</i>

Vendor #2 – Pricing
<ul style="list-style-type: none">• <i>Pricing of \$183,576 is the highest of the eight proposals submitted.</i>

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VENDOR: Vendor #3

OVERALL RANKING: 3

SUBJECT MATTER EXPERTS/RATERS: 1. *Finance Manager - Accounting* 2. *Public Works Project Manager* 3. *Fire Senior Administrative Analyst*

I. MINIMUM QUALIFICATIONS REVIEW

- Written Proposal Score: 1,025

Vendor #3 – Minimum Qualifications Review		
<u>Criteria</u>	<u>Total Weighted Score</u>	<u>Maximum Score</u>
<i>Proposal Clarity</i>	37.5	75
<i>Firm Qualifications</i>	262.5	375
<i>Staffing/Experience</i>	250	375
<i>Understanding/Methodology</i>	180	300
<i>Cost</i>	195	225
<i>References</i>	100	150
<i>Local Vendor (bonus)</i>	0	15
Total	1,025	1,515

II. DUE DILIGENCE REVIEW

- Proposal Ranking: 3

Vendor #3 – Summary of Review
<ul style="list-style-type: none">• <i>Some unnecessary information provided about their tax services in which we don't need at the City.</i>• <i>Proposal could have been better formatted.</i>• <i>Provided auditing services to a wide variety and large number of public agencies, although the firm seems more geared toward school districts.</i>• <i>They have 28 employees, and do business in 32 states and have been in business for 60 years.</i>• <i>References from the cities of Laguna Hills, Signal Hill, La Mirada, and Covina.</i>

Vendor #3 – Pricing
<ul style="list-style-type: none">• <i>Pricing of \$131,330 is the lowest of the eight proposals submitted.</i>