

2017 Audit RFP
 Summary of Technical Proposals Received
 7/13/2017

Proposal Evaluation Criteria

1. Prior experience of the firm and staff in the auditing of governmental agencies.
2. Demonstrated competence and qualifications of staff directly related to the audit.
3. Organizational size/structure of the firm.
4. Firm's understanding of the work to be performed; overall supervision of the audit.
5. Experience with the CAFR.
6. Overall proposal.

Responding Firms

- BKD LLP
- Belt Harris Pechacek, LLLP
- Brockway Gersbach Franklin & Niemeier, PC
- Davis Kinard & Co, PC
- Park Fowler & Co
- Pattillo, Brown & Hill, LLP
- RPC CPAS + Consultants, LLP
- Whitley Penn

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Technical Proposal Criteria #	#2	#3	#4	#4	#4	#5	#4	#4	#4	#4	#4	#1	#1
Firm	Independent of the city	License to practice in Texas	Size of: firm staff ----- government audit staff	Location of office where working	Staff to be employed in this engagement	Quality of staff over term of agreement would be ensured	Copy of report of external quality control review	External review included a review of gov engagement (Y/N)	Results of any federal/ state reviews from past 3 years	Any disciplinary action taken or pending against firm in past 3 years	Experience with CAFR	Can work within our time parameters	
Davis Kinard & Co, PC	✓	✓	90 --- 18+	Abilene, TX	Engagement Shareholder + Engagement Manager + Technical Reviewer + 2 Audit Staff	✓	✓	Y	"No significant deficiencies noted"	None	✓	✓	
Brockway Gersbach Franklin & Niemeier, PC	✓	✓	30 --- Not listed	Temple, TX	Engagement Partner + Manager + Supervising Senior + Staff	✓	✓	Y	None	None	✓	✓	

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Technical Proposal Criteria Firm	#5 Identify those assigned to engagement	#5 CPA	#5 Gov auditing experience	#5 CPE for past 3 years	#5 Membership in relevant professional orgs
Davis Kinard & Co, PC	L. Diane Terrell - Audit Shareholder	✓	25 years of public accounting experience including gov auditing	✓	TSCPA (& local), AICPA, GFOA, GFOAT, TASBO, AICPA Gov Quality Control Center
L. Diane Terrell 400 Pine Street, Suite 600 Abilene, TX 79601	Kevin Randolph - Audit Manager Jennifer Eller - Technical Reviewer	✓ ✓	16 years of accounting experience including gov auditing 18 years account experience including gov auditing	✓ ✓	TSCPA (& local), AICPA, TASBO TSCPA (& local), AICPA
Brockway. Gersbach, Franklin & Niemeier, PC	Stephen Niemeier - Engagement Partner	✓	34 years of audit experience including local gov	✓	AICPA, TSCPA (& local), Assoc of Gov Accts, GFOA, AICPA Gov Quality Control Center
Stephen H. Niemeier 3520 SW H.K. Dodgen Loop Temple, TX 76504	Christine Wells - Engagement Manager Jessica Bozon - Engagement Supervising Senior Ashlyn Wilcox - Staff Auditor	✓ ✓	7 years of city auditing 2 years of gov auditing 2 years of gov auditing	✓ ✓ < 1 yr w/ firm	AICPA, TSCPA (& local), Heart of TX Chapter of CFMA AICPA, TSCPA (& local), Heart of TX Chapter of CFMA None Listed

Common Member Organizations:

- ACFE - Association of Certified Fraud Examiners
- AICPA - American Institute of Certified Public Accountants
- GFOA - Government Finance Officers Association
- GFOA SRC - Government Finance Officers Association Special Review Committee (CAFR Reviewer)
- GFOAT - Government Finance Officers Association of Texas
- GTOT - Government Treasurers of Texas
- TSCPA - Texas Society of Certified Public Accountants