

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

Belt Harris Pechacek, LLLP
Brockway, Gersbach, Franklin & Niemeier, PC
Carr, Riggs & Ingram, LLC
Martinez, Rosario & Company, LLP
Pattillo, Brown & Hill, LLP
Whitley Penn, LLP

Summary of Technical Proposals Received

Technical Proposal Criteria #	#2	#3	#4	#4	#4	#4	#4	#4	#4	#5
				External review		Any disciplinary	Size of:			Quality of staff
			Copy of report	included a	Results of any	action taken	firm staff	Location of	Staff to be employed in	over term of
Firm	Independent	License to	of external	review of gov	federal/ state	against firm in	government	office where	this engagement	agreement
	of the city	practice in	quality control	engagement	reviews from	past 3 years	audit staff	working		would be
		Texas	review	(Y/N)	past 3 years					ensured
Pattillo, Brown & Hill, LLP Todd Pruitt, CPA 401 West Highway 6 Waco, TX 76710	✓	✓	✓	Yes	No	No	120+ ----- 41+	Waco, TX	5 + including: 1 partner 1 concurring partner 1 manager 1 senior 1 IT specialist various staff auditors	Not addressed
Brockway, Gersbach, Franklin & Niemeier, PC Stephen H. Niemeier, CPA, CFP, President 3520 SW H.K. Dodgen Loop Temple, TX 76504	✓	✓	✓	Yes	No	No	30 ----- 10	Temple, TX	4 including: 1 partner 1 manager 1 supervising senior 1 staff	Partner and manager will remain on team

Technical Proposal Criteria #	#5	#5	#5	#5	#5
Firm	Identify those assigned to engagement	CPA	Governmental auditing experience	CPE for past 3 years	Membership in relevant professional organizations
Pattillo, Brown & Hill, LLP Todd Pruitt, CPA 401 West Highway 6 Waco, TX 76710	Todd Pruitt - Engagement Partner	✓	24+ years of governmental auditing experience	✓	AICPA, TSCPA, GFOA SRC (former), TARC, GFOA, GFOAT
	John Manning - Concurring Partner	✓	24 years of governmental auditing experience	✓	AICPA, TSCPA, GFOA SRC, Gulf Coast GFOA
	Kent Willis - Manager	✓	7 years of governmental auditing experience	✓	TSCPA, AICPA
	Steven Smith - Senior	✓	4 years of governmental auditing experience	✓	AICPA, TSCPA
	Don Abel - IT Specialist		16 years in the information systems field	N/A	N/A
	Staff auditors with experience working on local govt audits				
Brockway, Gersbach, Franklin & Niemeier, PC Stephen H. Niemeier, CPA, CFP, President 3520 SW H.K. Dodgen Loop Temple, TX 76504	Stephen Niemeier - Engagement Partner	✓	35 years of audit experience including local governments	✓	AICPA, TSCPA (& local), Assoc of Gov Accountants, GFOA, AICPA Gov Quality Control Center, Heart of TX Chapter of CFMA (President)
	Christine Wells - Engagement Manager	✓	10 years of audit experience, 8 years include local governments	✓	AICPA, TSCPA (& local), Heart of TX Chapter of CFMA (Vice President)
	Jessica Bozon - Engagement Supervising Senior	✓	6 years of audit experience, 3 years include local governments	✓	AICPA, TSCPA (& local), Heart of TX Chapter of CFMA
	Ashlyn Wilcox - Staff Auditor		3 years of governmental auditing experience	✓	None Listed

Common Member Organizations:
AICPA - American Institute of Certified Public Accountants
TSCPA - Texas Society 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