

SUMMARY TABULATION RFP

2008-09-RFP-AUDIT_TAX RFP Issue Date: 4/9/2009
 Summary Tabulation Date 5/22/2009

Audit/Tax RFP Response Analysis	Possible Points	Total Points Awarded				
		Vendor #1	Vendor #2	Vendor #3	Vendor #4	Vendor #5
		Cherry Bekaert Holland	Carr Riggs Ingram	James Moore & Company	Harvey Covington Thomas	Averett Warmus Durkee
Technical Responses	85					
Responsiveness, Organization, Clarity of Proposal		13.67	13.00	13.00	12.33	12.67
Not-for-profit and grant experience of the firm and proposing office		14.00	13.67	15.00	11.33	13.33
Agreement to meet WFI's general terms and conditions		19.33	18.33	17.33	19.33	18.33
Qualifications and experience of the proposed key engagement team members		18.00	18.00	19.00	17.00	16.67
Technical aspects of the audit approach		9.33	9.00	9.00	9.33	9.33
Geographic location of the proposer		3.67	5.00	5.00	3.67	3.33
Price Reply	15	9.43	12.79	15.00	12.89	12.80
Total Points	100	87.43	89.79	93.33	85.89	86.47
		3rd	2nd	1st	5th	4th

Recommended
see notes 2

Quoted Price for selected contractor	\$ 96,000	see note 3
Staff Budget Recommendation	110,337	see note 4
Variance under/(over) estimate	<u>\$ 14,337</u>	see note 5

Notes:

- 1) Points for price are shown on the Price Replies worksheet tab; points objectively determined based on a pro-rata basis automatic calculation in relation to the lowest price submitted.
- 2) WFI staff recommends selecting **James Moore & Company** based on the following items that demonstrate they will provide the best value to WFI and to the State:
 - a) James Moore & Company's price quote represents a complete estimate with hours for onsite testing, administrative tasks, travel, and other expenses.
 - b) James Moore & Company received the highest scores on the technical response.
 - c) James Moore & Company submitted the lowest price proposal, proposing to bill less hours than the competitors for the engagements for all three years, due to their experience in auditing similar non-profits and their desire to gain WFI as a client.
 - d) The discount given by James Moore & Company shows the largest savings to WFI.
 - e) The quoted price by the selected contractor is under the budget recommendation and within the projected price range of the initial price analysis prepared prior to receipt of proposals.
- 3) Quoted price is the full price; net of all discounts given by the selected contractor.
- 4) This is the median of the recommended price range based on the initial price analysis which was prepared prior to receipt of proposals.
- 5) James Moore & Company has three regional workforce boards as current audit clients and has also conducted twenty-one (21) audits of eight (8) regional workforce boards from 2004 - 2008, which factors into the variance under the budget recommendation.

Additional Info:

Six references were submitted by James Moore & Company - three former clients and three current clients. Two references have been contacted thus far, both regional workforce boards who gave positive recommendations. The other four references will be contacted prior to negotiating the agreement for services with James Moore & Company.

James Moore & Company has committed to planning and performing the engagements to insure the Planned Project Schedule and all other aspects of the RFP are met.