



OPEN DATE: August 21, 2024 2:00 PM CST

Evaluator

Proposer	Vidal Roman		Ezeiza Garcia		Andy Garcia		Average	Notes:
	Rating	Score	Rating	Score	Rating	Score		
Burton, McCumber & Longoria, LLP.	Acceptable		Acceptable		Acceptable			
Sec. 1. Responsiveness of Proposal: (40 points max)	Acceptable	39	Acceptable	33	Acceptable	23	31.67	Strengths: (VR) Experience;
Sec. 2. Experience and Performance History: (40 Points max)	Acceptable	40	Acceptable	40	Acceptable	32	37.33	
Sec. 3. Cost Proposal (20 Points max)	Acceptable	17	Acceptable	19	Acceptable	17	17.67	Weaknesses:
Total Score	96		92		72		86.67	Comments: (EG) See attached backup (AG) See Attached
CRI	Acceptable		Acceptable		Acceptable			
Sec. 1. Responsiveness of Proposal: (40 points max)	May be Acceptable	39	Acceptable	37	Acceptable	21	32.33	Strengths:
Sec. 2. Experience and Performance History: (40 Points max)	Acceptable	40	Acceptable	37	Acceptable	29	35.33	
Sec. 3. Cost Proposal (20 Points max)	Acceptable	13	Acceptable	19	Acceptable	14	15.33	Weaknesses:
Total Score	92		93		64		83.00	Comments: (EG) See attached backup (AG) See Attached



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Proposer	Vidal Roman		Ezeiza Garcia		Andy Garcia		Average	Notes:
	Rating	Score	Rating	Score	Rating	Score		
Luis C. Orozco								
Sec. A. Scope of Service: (30 points max)	Acceptable	38	Acceptable	34	Acceptable	19	30.33	<b>Strengths:</b>
Sec. B. Benefit Summary/Proposed Rate: (30 Points max)	Acceptable	35	Acceptable	38	Acceptable	14	29.00	
Sec. E. Underwriting Requirements/Plan Exceptions (10 Points max)	Acceptable	17	Acceptable	18	Acceptable	15	16.67	
<b>Total Score</b>		90		90		48	76.00	<b>Comments: (EG) See attached backup (AG) See Attached</b>

Firms		BML	
Evaluation Guide	Points	Score	Notes
Cover letter	4	4	Provided a transmittal letter & executive summary
Firm Qualifications	12	12	Pg 11
Three References	2	1	Pg 6-City of Pharr
Scope of Svcs	22	20	Pg 10- Work Plan
Total Responsives of Proposal	40	37	
Experience	25	22	Pg 6-Listed 1 City, Hidalgo County District, MRA & Counties with in the past 5 years but not limited.
Capacity to Perform	15	15	Pg 11-12 - Qualificiation and team
Total Experience Performance	40	37	
Cost of Base Audit Svcs	14	13	Pg 26-\$79,500
Cost of ACFR Preparation	2	2	Pg 26-\$15,000
Cost of Single Audit	2	2	Pg 26-\$5,500 major program
Additional Bookkeeping Hrs	2	2	Pg 26-\$95 additional work per hour
Cost Proposal	20	19	

100 93

**Total Cost of AUDIT**

**100,000.00**

5,500.00

5,500.00

\$

**111,000.00**

Firms		CRI	
Evaluation Guide	Points	Score	Notes
Cover letter	4	4	Pg 1 & 3 -Provided a cover sheet & transmittal letter
Firm Qualifications	12	12	Pg 5-10
Three References	2	2	Pg 13-City of Brownsville, City of Harlingen, City of Weslaco & City of SPI
Scope of Svcs	22	15	Pg 50- Engagement Letter
Total Responsives of Proposal	40	33	
Experience	25	25	Pg 13-Listed 4 Cities and a District plus the length of Services (some+20 years)
Capacity to Perform	15	15	Pg 5-11-Firm Profile & Team, 25 years of experience
Total Experience Performance	40	40	
Cost of Base Audit Svcs	14	13	Pg 19-\$85,500, \$88,500 2025, \$91,500 2026
Cost of ACFR Preparation	2	2	Pg 19-\$15,000, same 2025, same 2026
Cost of Single Audit	2	2	Pg 19-\$5,500 one major program
Additional Bookkeeping Hrs	2	2	Pg 19-\$125-\$155 additional work per hour
Cost Proposal	20	19	

100 92

**Total Cost of AUDIT**

**106,000.00**

5,500.00

5,500.00

\$

**117,000.00**

Firms		Luis C Orozco	
Evaluation Guide	Points	Score	Notes
Cover letter	4	4	Pg 2-Cover letter
Firm Qualifications	12	10	Pg 9 & 10
Three References	2	2	Pg 6-City of Edinburg, City of Palmview, City of Edcouch and City of Sullivan
Scope of Svcs	22	18	Pg 4-Provided a detail audit schedule
Total Responsives of Proposal	40	34	
Experience	25	25	Pg 6-Listed 4 Local Cities, 3 School Districts and housing
Capacity to Perform	15	13	Pg 9- Personnel
Total Experience Performance	40	38	
Cost of Base Audit Svcs	14	12	Pg 11
Cost of ACFR Preparation	2	2	Pg 11-\$65,450 Total
Cost of Single Audit	2	2	Pg 11-\$55,250 Total
Additional Bookkeeping Hrs	2	2	Pg 11- \$125 additional work per hour
Cost Proposal	20	18	

100 90

**Total Cost of AUDIT \$**

**65,450.00**



Base Audit Services	10	6	3-4	10	8-10	6	14-15	Provides audit objectives including their intent to confirm fair representation of financials and Single Audit Report, audit in accordance with appropriate standards, and issue management recommendation letters. However, CRI does not provide the methodologies and approaches to conduct internal control evaluations or other audit work. Additionally, not time frame for audit completion is provided.
ACFR Preparation	4	0	N/A	0	N/A	0	14-15	ACFR mentioned but only states that it is out of scope for base audit services. No scope provided on the preparation of the Annual Comprehensive Financial Report (ACFR)
Single Audit	4	1	3	1	6	1	14	Only stated that compliance with the Single Audit Act will be conducted by ensuring internal controls and meeting provisions of grant agreements/contracts at bottom of page 6. No methodology on completion provided.
Bookkeeping	2	0	N/A	0	N/A	0	N/A	No scope provided on the use of bookkeeping services.
<b>Total Technical Proposal with Scope of Services Requested Points</b>	<b>22</b>	<b>7</b>		<b>11</b>		<b>7</b>		
<b>Total Responsiveness of Proposal</b>	<b>40</b>	<b>19</b>		<b>23</b>		<b>21</b>		
<b>Experience and Performance History</b>								
<b>Experience with Local Governmental Entities</b>								
Years in Business	5	2	5	3	1, 11	2	6	States years in business is appx. 28 years (formed in 1997).
Years Providing Service for Local Governmental Entities	10	4	6	8	14	10	13	CRI has provided services for over 20+ years to municipal entities, including City of Brownsville, City of Harlingen, City of Weslaco, and City of South Padre as seen on page 13.
Number of Local Governmental Entities served with a population over 40,000	8	1	6	4	14	4	13	Excluding any special districts and as disclosed in the provided proposal, CRI for the Rio Grande Valley has completed services for 3 municipalities over 40,000 in population including the City of Brownsville, City of Harlingen, and City of Weslaco.
Experience with GFOA Certification?	2	0	N/A	2	2	2	13	Has experience working with GFOA as seen on relevant experience on page 13.
<b>Total Experience with Local Governmental Entities</b>	<b>25</b>	<b>7</b>		<b>17</b>		<b>16</b>		
<b>Capacity to Perform (Staffing Levels and Key Personnel)</b>								
# of Personnel on Engagement Team	5	3	9	5	12	5	8-10	Identified 7 key personnel including 3 unnamed staff auditors and excluding review and consultation partners not directly involved in the engagement as seen on page 10.

Experience and Knowledge of Overall Engagement Team	5	1	9	5	18-25	All identified key personnel on engagement team possess a CPA license displaying experience in the field of public accounting. All key personnel on engagement team less the Quality Assurance Partner are also Certified Fraud Examiners (CFEs). All key personnel also possess a minimum of 10 years working with municipal governments and are all affiliated with most standard setting bodies including The Texas Society of CPAs (TSCPA), American Institute of CPAs (AICPA), Association of Certified Fraud Examiners (ACFE), and Government Finance Officers Association (GFOA).	3	8-10	Three of the four key personnel on the engagement team possess a CPA. All key personnel have at least 10 years of service in public accounting. Although governmental accounting is mentioned in their experience, on the lead engagement partner formally states that she has 12 years of experience in public sector accounting. Key personnel affiliations include the American Institute of CPAs (AICPA) and Texas Society of Certified Public Accountants (TSCPA)
Experience and Knowledge of Lead Engagement Partner	5	3	9	5	16-17	Lead Engagement Partner (Mr. Longoria) is a licensed CPA and CFE with over 25 years of governmental experience. He has served with BML for over 28 years and has served in the audit profession since 1987 (approx. 38 years of experience). He also maintains affiliation with standard setting bodies including AICPA, TSCPA, and ACFE.	3	8	Lead engagement partner (Ms./ Yniguez) is a licensed CPA with 12 years of governmental experience and 11 years of experience in private sector accounting.
<b>Total Capacity to Perform</b>	<b>15</b>	<b>7</b>	<b>15</b>	<b>15</b>			<b>11</b>	<b>11</b>	
<b>Total Experience and Performance History</b>	<b>40</b>	<b>14</b>	<b>14</b>	<b>32</b>			<b>29</b>	<b>29</b>	
<b>Cost Proposal</b>									
Cost of Base Audit Svcs	14	14	11	11	26	\$79,500 (Yr 1-3)	9	19	\$85,500 (Yr 1), \$88,500 (Yr 2), \$91,500 (Yr 3), Avg = \$88,500.
Cost of ACFR Preparation	2	0	11	2	26	Above Price includes ACFR but cannot separate as requested in Solicitation Addendum. No points awarded.	2	19	\$15,000 (Yr 1-3)
Cost of Single Audit	2	0	11	2	26	\$55,250 (Yr 1-3)	2	19	\$5,500/major program (Yr 1-2), \$6,000/major program (Yr 3). Avg/Yr = \$5,667. 3 Major Programs samples per year = \$17,001.
Additional Bookkeeping Hrs	2	1	11	2	26	\$125/Hr	1	19	\$125-\$155 Hourly Rate. Avg = \$140/Hr
<b>Total Cost of Proposal</b>	<b>20</b>	<b>15</b>	<b>17</b>	<b>17</b>			<b>14</b>	<b>14</b>	
<b>TOTAL SCORE</b>	<b>100</b>	<b>48</b>	<b>72</b>	<b>72</b>			<b>64</b>	<b>64</b>	