



CITY OF NORMAN, OK STAFF REPORT

MEETING DATE: 06/27/2023

REQUESTER: Clint Mercer, City of Norman Chief Accountant

PRESENTER: Clint Mercer, City of Norman Chief Accountant

ITEM TITLE: CONSIDERATION OF APPROVAL, REJECTION, AMENDMENT, AND/OR POSTPONEMENT OF AUTHORIZATION FOR THE AWARD OF REQUEST FOR PROPOSAL RFP-2223-64 TO FORVIS, L.L.P., IN THE AMOUNT OF \$157,500 FOR PROFESSIONAL EXTERNAL AUDITING SERVICES FOR THE CITY OF NORMAN AND RELATED TRUSTS.

BACKGROUND:

On April 26, 2023, Request for Proposal RFP-2223-64 for independent auditing services was sent to eleven qualified accounting firms. The RFP's purpose was to recommend a firm to provide auditing services for the City of Norman and its beneficial trusts and authorities for a contemplated term of three years with two one-year renewal options. These renewal periods will be subject to the annual review and recommendation of the Council Finance/Audit Committee, the approval of the Norman City Council, the satisfactory negotiation of terms (including a price acceptable to both the City and the Auditor), and the annual availability of appropriated funds. The City has used FORVIS, LLP for the past ten years.

DISCUSSION:

The City requested proposals through direct mail from eleven qualified Certified Public Accounting (CPA) firms in Norman, Oklahoma City and Tulsa, of which three responded. Included in the RFP was a list of criteria that the City would use to evaluate and select the best qualified firm with cost a consideration, but not the determining factor in the selection process.

The proposals were reviewed separately by members of a Selection Committee consisting of Anthony Francisco, Director of Finance, and Clint Mercer, Chief Accountant. The Selection Committee reviewed the three proposals received, utilizing the pre-determined evaluation criteria:

1. Responsiveness of the firm's proposal by a clear statement demonstrating and understanding of the work to be performed for the City of Norman;

2. Technical experience of the firm or individuals making the proposal;
3. Professional qualifications to perform the work or tasks described in the proposal;
4. Prior experience performing the same or similar type of work with recent references from the firm's municipal clients; and
5. Cost to perform the work or tasks described in the RFP.

After a careful review of the proposals and giving appropriate weight to each of the above mentioned evaluation criteria, the Selection Committee concluded, in consultation with the City Manager, that the firm of FORVIS, LLP could provide the best overall auditing services consistent with the needs of the City of Norman. FORVIS, LLP has performed more than satisfactory auditing services for the City of Norman and also performs (or has performed in the recent past) auditing services for the City of Norman, University of Oklahoma, Oklahoma City-County Health Department, and Chickasaw Nation.

RECOMMENDATION:

The Selection Committee recommends that the firm of FORVIS, LLP be selected to provide auditing services to the City of Norman for the fiscal years ending June 30, 2023, 2024 and 2025, with two one-year options to renew, at a first-year cost of \$157,500. Such recommendation is based on FORVIS, LLC's professional qualifications, superior technical experience of the firm and staff in the area of governmental accounting and auditing, history of service to the City and its Authorities, and a reasonable cost for such services.