

TCHS - AUDIT/990 TAX SERVICES SCORING CRITERIA SHEET				Evaluator's Name: _____			Date: _____		
				Auditing Firm: _____					
Please insert your score in the "red" cell located under the "Total Points Awarded" column. You may add any comments needed in the rows found under the "Evaluation Selection Criteria". Please note you have a tab already included in this workbook for EACH firm - see name of tab and "Auditing Firm" name above. You may electronically sign.									
Category	Evaluation Selection Criteria			Total Points Available	Points awarded and Comments	Total Points Awarded	Weight	Weighted Total	
Scope of Engagement									3%
I.	Audit reports that comply with set standards. Preparation of the 990 income tax returns			0-3	Maximum points should be awarded if RFP confirmed scope of engagement	0	20%	0.00	
Deadlines									8%
II.	Applicant is able to meet TCHS deadlines:				2 points should be awarded per each confirmed deadline for a total maximum of 8 points.				
	1	All interim work will be completed in June.		0-2		0	20%	0.00	
	2	All final audit fieldwork would commence August 14 and be completed by August 31.		0-2		0	20%	0.00	
	3	The draft audit report shall be submitted to the TCHS Finance Committee no later than October 16.		0-2		0	20%	0.00	
	4	Final audit presented to Board of Directors on October 17.		0-2		0	20%	0.00	
Provision of Work Papers									6%
III.	1	Firm should provide an explanation of the process that the auditing firm will employ to ensure that work papers are available to TCHS		0-3	3 points should be awarded per each confirmed requirement for a total maximum of 6 points	0	20%	0.00	
	2	Work papers must be retained for seven (7) years from the date of the audit report		0-3		0	20%	0.00	
Minimum Requirements									6%
IV.	The auditing firm must affirm that the following mandatory criteria are met:				2 points should be awarded per each confirmed criteria for a total maximum of 6 points.				
	1	The auditors meet the independent and education requirements of the Government Auditing Standards issued by the Comptroller General of the United States.		0-2		0	20%	0.00	
	2	The auditors do not have a record of substandard audit work.		0-2		0	20%	0.00	
	3	The auditors meet all specific requirements imposed by the state or local laws, rules, and regulations		0-2		0	20%	0.00	
Prior Experience									31%
V.	1	Prior experience auditing programs funded by Central Florida Behavioral Health Network and the federal government		0-6	*describes and gives detail in years or number of clients = 6 points; *describes experience, but provides no detail in years or clients = 3 points; *no description = 0 points	0	40%	0.00	
	2	Prior experience auditing not-for-profits		0-6	*Assign points using same criteria as above	0	40%	0.00	
	3	List of existing clients for references		0-3	Maximum 3 points should be awarded if the RFP included list of clients	0	40%	0.00	

Professional Organizational Capabilities									28%
VI.	1.	Description of organization's size, location and range of activities	0-6	Included organizational chart=1 point; Included office location for audit, tax & consulting services applicable = 1 point; 3+ partners = 3 points; 2 partners = 1 point; 1 partner = 0 points; Total maximum of 6 points	0	30%	0.00		
	2.	Prior experience of the managing partner or audit team similar to the type of audit requested	0-6	*15+ years prior experience = 6 points *10 - 14 years = 3 points * <10 years = 0 points	0	30%	0.00		
	3.	A copy of the most recent peer review	0-6	Maximum points should be awarded if the RFP included a current peer review with no deficiencies	0	30%	0.00		
Personnel Changes									9%
VII.	1.	Changing engagement staffing (partner through "in charge" levels). TCHS is looking for continuity of the audit team. (does the firm retain their employees; i.e. low turnover)	0-3	*3 points if RFP had a statement affirming a policy of continuity. *0 points if RFP had no statement.	0	30%	0.00		
	2.	The ability of TCHS to request staffing changes	0-3	*3 points if RFP had a statement affirming request; *0 points if RFP had no statement	0	30%	0.00		
Proposed Estimate									2%
VIII.	1.	Submission of RFP to perform requested services, include any start-up costs.		Median costs of proposals are:	0	10%	0.00		
		Firms proposed total costs:							
				*Maximum 4 additional points will be awarded or subtracted based on the variance from the median.					
Executive Summary/Other									5%
IX.	1.	Additional benefits or highlights of information provided by firm that adds value to this proposal (value added services). Please provide justification for score below.	0-10	10 points maximum allowed for value added services.	0	10%	0.00		

100%

Maximum Points 76
Maximum Weighted Total 19.2

Total Points 0.0
Weighted Total 0.00

Evaluator's Signature

Date