



Notice of Award

Solicitation Number	293250	Award Date	3/24/2023 10:11 AM CDT
Solicitation Title	Professional Independent Auditing Services		
Buyer Name	Christina Alexander	Buyer Email	christina.alexander@nashville.gov
BAO Rep	Sierra Washington	BAO Email	sierra.washington@nashville.gov

Awarded Supplier(s)

In reference to the above solicitation, this solicitation results in a contract with the final selection having been made by the Post Audit Board, as required by the Metro Charter.:

Company Name	Crosslin, PLLC	Company Contact	John Crosslin		
Street Address	3803 Bedford Ave., Ste. #103				
City	Nashville	State	TN	Zipcode	37215

Company Name		Company Contact			
Street Address					
City		State		Zipcode	

Company Name		Company Contact			
Street Address					
City		State		Zipcode	

Certificate of Insurance

The awarded supplier(s) must submit a certificate of insurance (COI) indicating all applicable coverage required by the referenced solicitation. The COI should be emailed to the referenced buyer no more than 15 days after the referenced award date.

Equal Business Opportunity Program

Where applicable, the awarded supplier(s) must submit a signed copy of the letter of intent to perform for any and all minority-owned (MBE) or woman-owned (WBE) subcontractors included in the solicitation response. The letter(s) should be emailed to the referenced business assistance office (BAO) rep no more than two business days after the referenced award date.

Yes, the EBO Program is applicable.

No, the EBO Program is not applicable.

Monthly Reporting

Where applicable, the awarded supplier(s) will be required monthly to submit evidence of participation and payment to all small (SBE), minority-owned (MBE), women-owned (WBE), LGBT-owned (LGBTBE), and service disabled veteran owned (SDV) subcontractors. Sufficient evidence may include, but is not necessarily limited to copies of subcontracts, purchase orders, applications for payment, invoices, and cancelled checks.

Questions related to contract compliance may be directed to the referenced BAO rep.

Yes, monthly reporting is applicable.

No, monthly reporting is not applicable.

Public Information and Records Retention

Solicitation and award documentation are available upon request. Please email the referenced buyer to arrange.

A copy of this notice will be placed in the solicitation file and sent to all offerors.

ML Supervisor (Initial)

Michelle A. Hernandez Lane
Michelle A. Hernandez Lane
Purchasing Agent & Chief Procurement Officer

RFQ 293250 Professional Independent Auditing Services Evaluation Committee Score Sheet

Offeror	UHY LLP	CliftonLarsonAllen LLP	Cherry Bekaert LLP	Eide Baily LLP	Crosslin PLLC
Contract Acceptance	Yes	Yes	Yes	Yes	Yes
Cost (20 points)	18.84	17.32	16.62	16.06	20.00
Team Qualification (15 points)	13.00	10.00	10.00	9.00	14.00
Firm Qualifications (25 points)	20.00	21.00	20.00	18.00	23.00
Project Understanding, Approach, Schedule and Risk Mitigation (25 points)	20.00	21.00	20.00	18.00	23.00
Reference Projects (15 points)	15.00	15.00	15.00	13.00	15.00
Total Evaluation Scores	86.84	84.32	81.62	74.06	95.00

Evaluation Comments

UHY LLP
Strengths
Proposal demonstrated firm's hospital experience. Proposal demonstrated firm's school experience. Proposal demonstrated firm's team diversity. Proposal demonstrated and provided other required information, with the exception of the below noted weaknesses.
Weaknesses
Proposal demonstrated limited local management coverage availability. Proposal failed to provide desk reviews. Proposal demonstrated limited local and Government experience. Firms proposed project approach was unclear, quality assurance plan lacked detail and audit approach lacked continuity. Proposal failed to identify a single point of contact for Metro contract. Proposal was unclear demonstrating firm's proposed schedule and resources allocations.

CliftonLarsonAllen LLP

Strengths

Proposal demonstrated team's Government experience. Proposal demonstrated firm's industry ranking as 8th largest in the Country. Proposal demonstrated firm's single audit experience. Proposal demonstrated firm's capacity to perform. Proposal provided a detailed project timeline, to include hours and staffing. Firm provided a detailed project approach. Reference projects were of similar size, scope, and complexity. Proposal demonstrated and provided other required information, with the exception of the below noted weaknesses.

Weaknesses

Firm has contract exceptions. Proposal demonstrated limited local experience. Proposal demonstrated limited Government experience. Proposal failed to provide desk reviews. Firm's proposed risk mitigation plan lacked comprehensive detail.

Cherry Bekaert LLP

Strengths

Proposal demonstrated Metro experience with relationship partners (subcontractors). Proposal demonstrated firm's proposed team Government experience. Firm proposed A.I. software for scope of services. Reference projects were of similar size, scope, and complexity. Proposal demonstrated and provided other required information, with the exception of the below noted weaknesses.

Weaknesses

Firm has contract exceptions. Proposal demonstrated limited local experience. Proposal demonstrated limited Government experience. Proposal demonstrated that the large majority of proposed team are not licensed in State of TN. Proposal demonstrated limited TN engagements for firm qualifications. Proposed project time line was unclear.

Eide Baily LLP

Strengths

Proposal demonstrated subcontractor's working experience with Metro. Proposal demonstrated Government experience. Reference projects were of similar size, scope, and complexity. Proposal demonstrated and provided other required information, with the exception of the below noted weaknesses.

Weaknesses

Firm has contract exceptions. Proposal demonstrated Audit Manager will be only TN representation. Proposal demonstrated Audit Manager has no auditing experience. Proposal demonstrated limited local experience. Proposal demonstrated limited Government experience. Firm failed to include cover page on proposal. Proposal failed to demonstrate TN engagements, desk audits, hospital experience, and Water Services experience. Proposal failed to demonstrate firm's capacity to perform. Firm's audit schedule lacked detail. Proposal failed to demonstrate firm's clear understanding of scope of work.

Crosslin PLLC

Strengths

Proposal demonstrated team's Government experience. Proposal demonstrated firm's knowledge of and experience working with Metro's policies and procedures. Proposal demonstrated firm's experience providing auditing services, to include using BDO network. Proposal demonstrated firm's capacity to perform. Proposal provided a detailed project timeline. Firm provided a detailed project approach. Firm provided detailed quality assurance, delivery concerns, and mitigation plans. Reference projects were of similar size, scope, and complexity. Proposal demonstrated and provided other required information, with the exception of the below noted weaknesses.

Weaknesses

Proposal demonstrated firm's limited National exposure to auditing industry. Proposal demonstrated firm's limited ability for innovative audit processes. Firm's project approach narrative was unclear and lacked detail.

Enter Solicitation Title & Number Below		Lowest Bid	
Professional Independent Auditing Services; RFQ 293250		\$4,570,000.00	20
Offeror's Name	Bids		RFP Cost Points
Crosslin PLLC	\$4,570,000.00		20.00
UHY LLP	\$4,851,754.00		18.84
CliftonLarsonAllen LLP	\$5,276,978.00		17.32
Cherry Bekaert LLP	\$5,498,003.00		16.62
Eide Baily LLP	\$5,690,295.00		16.06
No WBE EBO Goals or SBE/SDV Participation applicable to this solicitation			

BAO Small Business Assessment Sheet

BAO Specialist: Sierra Washington
Contract Specialist: Christina Alexander
Date: 02/09/2023

Department Name: Human Resources
RFP/ITB Number: 293250

Project Name: Independent Auditing Services
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Primary Contractor*	Prime Bid Amount	Total Proposed SBE (\$)	SBE Subs approved?	SBE (%)	Comments
Crosslin, PLLC	\$870,000.00	\$130,500.00	YES	15%	The prime is not an approved SBE and proposed the utilization of Thomason Financial Resources 2.5% for Government Auditing, and KBMD Certified Public Accountants 12.5% for Government Auditing as well.



Statement of M/WBE Utilization

Proposer's/Firm's Name: Crosslin, PLLC	Proposer's Phone #: 615-320-5500
Solicitation Title: Independent Auditing Services	Proposer's Email Address: john.crosslin@crosslinpc.com
Solicitation #: 293250	Amount Self-performed : \$578,550
Proposer's/Firm's Ownership: Non-M/WBE	Total Bid Amount: \$870,000
Proposed EBO Goal (%) : 31 <u> </u> MBE% 2.5 <u> </u> WBE%	EBO Goal Met? (Y/N) YES

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

				Certificate													
MBE/WBE Firm Name		MBE/WBE Firm Address		Type (MBE or WBE)		Code # UNSPS/NAICS		Percent of Total Contract									
		Phone/E-Mail		* MBE/WBE Group Type *		Description of Work		MBE/WBE Dollars (\$)									
1	SPD, Certified Public Accountants	4121 Clarksville Pike, Nashville TN 37218		615-891-3012		MBE		1		93151607		Government Auditing Services		\$82,650		9.5%	
2	Thomason Financial Resources	1009 Harding Trace CT, Nashville, TN 37221		615-479-4770		WBE		5		93151607		Government Auditing Services		\$21,750		2.5%	
3	Hoskins Company	1900 Church St., Nashville, TN 37203		615-321-7333		MBE		1		93151607		Government Auditing Services		\$78,300		9.0%	
4	KBMD Certified Public Accountants	315 10th Ave. N. Suite 118, Nashville, TN 37203		615-346-4016		MBE		1		93151607		Government Auditing Services		\$108,750		12.5%	
5						Select		Select									
6						Select		Select									
7						Select		Select									

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature) John Crosslin, Co-Managing Principals	Date 01/13/2023
<i>John Crosslin</i>	

*Note: MWBE is defined as business enterprise maintaining a significant business presence in the Program Area & performing a commercial useful function that is owned by one or more of the following: (1) African Americans (2) Native Americans, (3) Hispanic Americans, (4) Asian Americans, and (5) Women.

Has Prime Complied with EBO Goal? YES <input type="checkbox"/>	For Internal Office Use ONLY	If No, Good Faith Efforts Met? BAO Only
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BAO Representative: Sierra Washington **Metro Buyer:** Christina Alexander **Project Manager:** Jenneen Kaufman **Date:** 02/09/23

Total MBE Subcontracting	31	%	\$269,700
Total WBE Subcontracting	2.5	%	\$21750
Total MBE/WBE Participation:	33.5	%	\$291450

BAO Notes:


Certificate Of Completion

Envelope Id: 4E388306B32E4DAD822C7F6E6AD58E8F	Status: Completed
Subject: Award - RFQ # 293250 for Professional Independent Auditing Services	
Source Envelope:	
Document Pages: 7	Signatures: 1
Certificate Pages: 2	Initials: 1
AutoNav: Enabled	Envelope Originator:
Envelope Stamping: Enabled	Christina Alexander
Time Zone: (UTC-06:00) Central Time (US & Canada)	730 2nd Ave. South 1st Floor
	Nashville, TN 37219
	christina.alexander@nashville.gov
	IP Address: 170.190.198.185


Record Tracking

Status: Original 3/24/2023 9:11:48 AM	Holder: Christina Alexander christina.alexander@nashville.gov	Location: DocuSign
Security Appliance Status: Connected	Pool: StateLocal	
Storage Appliance Status: Connected	Pool: Metropolitan Government of Nashville and Davidson County	Location: DocuSign

Signer Events

Signer Events	Signature	Timestamp
Michelle A. Hernandez Lane michelle.lane@nashville.gov Chief Procurement Officer/Purchasing Agent Metro Security Level: Email, Account Authentication (None)	 Signature Adoption: Pre-selected Style Using IP Address: 172.58.149.138 Signed using mobile	Sent: 3/24/2023 9:14:20 AM Viewed: 3/24/2023 10:10:10 AM Signed: 3/24/2023 10:11:29 AM

Electronic Record and Signature Disclosure:
Not Offered via DocuSign

Michelle A. Hernandez Lane michelle.lane@nashville.gov Chief Procurement Officer/Purchasing Agent Metro Security Level: Email, Account Authentication (None)	 Signature Adoption: Pre-selected Style Using IP Address: 172.58.149.138 Signed using mobile	Sent: 3/24/2023 10:11:30 AM Viewed: 3/24/2023 10:11:41 AM Signed: 3/24/2023 10:11:54 AM
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Electronic Record and Signature Disclosure:
Not Offered via DocuSign

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps

Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	3/24/2023 9:14:20 AM
Certified Delivered	Security Checked	3/24/2023 10:11:41 AM
Signing Complete	Security Checked	3/24/2023 10:11:54 AM
Completed	Security Checked	3/24/2023 10:11:54 AM

Payment Events	Status	Timestamps
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