

Evaluation Criteria and Ratings

RFP # 2024-03

Audit and Tax Services

Proposer: _____										
CRITERIA	Maximum Score	Actual Score								
<i>Assign Points from range</i>										
1. FIRM PHILOSOPHY IN PROVIDING SERVICES The qualifications and experience of the applicant relative to this service. Non-Profit engagements/planning/benefits.	25 points									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px 5px;">a. No relevant prior experience cited</td> <td style="text-align: center; padding: 2px 5px;">0 Points</td> </tr> <tr> <td style="padding: 2px 5px;">b. Similar experience cited (non-profit)</td> <td style="text-align: center; padding: 2px 5px;">1 – 7 Points</td> </tr> <tr> <td style="padding: 2px 5px;">c. Experience with Fed/State entities</td> <td style="text-align: center; padding: 2px 5px;">8 – 15 Points</td> </tr> <tr> <td style="padding: 2px 5px;">d. Previous experience with Early Learning Coalitions</td> <td style="text-align: center; padding: 2px 5px;">16 – 25 Points</td> </tr> </table>	a. No relevant prior experience cited	0 Points	b. Similar experience cited (non-profit)	1 – 7 Points	c. Experience with Fed/State entities	8 – 15 Points	d. Previous experience with Early Learning Coalitions	16 – 25 Points		
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2. AUDIT APPROACH The proposal demonstrates understanding of services needed to achieve excellent customer satisfaction and make optimum use of resources available. Time estimates of all requirements provided.	30 points									
3. SCHEDULING AND STAFFING OF ENGAGEMENT Qualifications of proposed engagement team to be assigned, including participation in seminars and courses within the last three years. The projected timeline to complete the services and provide final reports.	25 points									
4. FEES Proposal demonstrates cost <i>effectiveness</i> in performing the services expected. <ul style="list-style-type: none"> • Proposed cost – within range and competitive • Degree of cost reasonableness for the services planned • First year pricing and three additional (renewal) years provided. 	20 points									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px 5px;">a. Not reasonable</td> <td style="text-align: center; padding: 2px 5px;">0 Points</td> </tr> <tr> <td style="padding: 2px 5px;">b. Fairly reasonable</td> <td style="text-align: center; padding: 2px 5px;">1 – 7 Points</td> </tr> <tr> <td style="padding: 2px 5px;">c. Reasonable</td> <td style="text-align: center; padding: 2px 5px;">8 – 15 Points</td> </tr> <tr> <td style="padding: 2px 5px;">d. Reasonable and competitive</td> <td style="text-align: center; padding: 2px 5px;">16 – 25 Points</td> </tr> </table>	a. Not reasonable	0 Points	b. Fairly reasonable	1 – 7 Points	c. Reasonable	8 – 15 Points	d. Reasonable and competitive	16 – 25 Points		
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b. Fairly reasonable	1 – 7 Points									
c. Reasonable	8 – 15 Points									
d. Reasonable and competitive	16 – 25 Points									
5. 3 References Provided		Yes/No								
Maximum: 100 Points	Total Score: _____									

Comments: _____

Evaluator Name (Print) _____

Signature _____ **Date** _____