



**MEMORANDUM**

**Date:** January 19, 2022

**To:** Dwayne Alexander, President & CEO

**Thru:** Herbert Becker, Chief Operating Officer  
 Dennis Lohr, Chief Financial Officer  
 Nella Castiov, Deputy Chief Financial Officer

**From:** Colene S. Orsini, Procurement Supervisor

**Re:** Recommended Award of RFP# PS-002-22 – Audit & Tax Services

**BACKGROUND:** The Jacksonville Housing Authority (JHA) is seeking the services of a professional company to provide Audit and Tax Services for our Agency. Our current contract has reached its five-year mark, and HUD Procurement Standards require us to conduct a new solicitation.

**DISCUSSION:** The JHA solicited following the JHA’s Procurement Policy by utilizing the Housing Agency Marketplace, where the solicitation was initially entered on October 26, 2021, with bids due December 14, 2021. Seven (7) bid responses were received from the solicitation; two of the proposals received were deemed non-responsible/non-responsive and therefore disqualified. All other bids were deemed responsible/responsive and sent to an Evaluation Team for review. The Evaluation Team consisted of Herbert Becker, Chief Operating Officer; Dennis Lohr, Chief Financial Officer; and Kort Parde, Director of Human Resources. They reviewed all bids submitted and scored each bid package based on the evaluation criteria established. The screenshot below shows the final scoring for each participant:

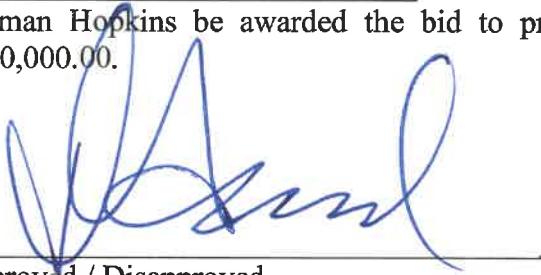


Official Proposal Evaluation Scoring Tabulation for  
 PS-002-22 Audit & Tax Services

Evaluation Criteria	Possible Points	Smith Martin & Co.			EFPR Group LLP			Rubio & Co			Berman Hopkins			Clifton Larsen Allen		
		HB	DL	KP	HB	DL	KP	HB	DL	KP	HB	DL	KP	HB	DL	KP
DATE AND TIME PROPOSALS RCVD	Percentage	71			87			72			92			80		
	Evaluators	HB	DL	KP	HB	DL	KP	HB	DL	KP	HB	DL	KP	HB	DL	KP
The PROPOSED COSTS submitted by the proposer.	30	20	20	20	30	30	30	10	10	10	25	25	25	15	15	15
The proposer's DEMONSTRATED TECHNICAL CAPABILITIES and APPROACH to performing the services outlined in Section 2.0. Scope of Work/Technical Specifications, including the availability of staff with professional qualifications and technical abilities based on the Agency review of the detailed professional resumes for persons identified within areas (5) and (6) of Attachment C, Profile of Firm Form, and any other staff that will be performing services as a result of award of this RFP.	20	20	15	15	20	10	16	20	20	15	20	20	17	20	20	14
The RESULTS of the proposers PEER REVIEW and EXTERNAL QUALITY REVIEWS that the proposer may submit (NOTE: The Agency will place particular emphasis on such submitted Reviews that are associated with HUD-related work).	10	9	10	7	9	10	5	10	10	8	10	10	9	10	10	9
The proposer's DEMONSTRATED QUALIFICATIONS, RELEVANT EXPERIENCE, and SUCCESSFUL PAST PERFORMANCE in performing the same or similar services, including (and very importantly) the proposer's experience with low-income housing tax credit developments.	30	25	20	18	30	25	20	29	30	23	30	30	27	29	30	28
The OVERALL QUALITY, ORGANIZATION, and PROFESSIONAL APPEARANCE of the PROPOSAL SUBMITTED, based upon the opinion of the evaluators.	10		7	7	9	8	8	8	5	9	9	10	9	9	9	8
Sub-total	100	74	72	67	98	83	79	77	75	65	94	95	87	83	84	74
Total		213			260			217			276			241		
Ranking		5			2			4			1			3		

**JUSTIFICATION:** As discussed, the need for a new contract for Audit & Tax Services is required per HUD Regulations. Based on the criteria scoring, it has been verified that Berman Hopkins is the best choice for our agency. They have been deemed a responsive and responsible bidder, not on the Federal Debarred List.

**AWARD RECOMMENDATION:** It is recommended that, in the best interest of the agency, Berman Hopkins be awarded the bid to provide Audit & Tax Services in the amount of \$130,000.00.



Approved / Disapproved  
cc: file

1/20/22  
Date



	<b>EFPR Group Bid Amount</b>	<b>Berman Hopkins Bid Amount</b>	<b>Rubino &amp; Company Bid Amount</b>	<b>Clifton Larson Bid Amount</b>	<b>Smith Marion Bid Amount</b>
Base Year – FYE 2021	\$ 95,500.00	\$ 130,000.00	\$ 145,000.00	\$ 140,000.00	\$ 142,050.00
Year 2 – FYE 2022	\$ 98,500.00	\$ 130,000.00	\$ 149,400.00	\$ 145,000.00	\$ 144,181.00
Year 3 – FYE 2023	\$ 101,500.00	\$ 135,000.00	\$ 153,900.00	\$ 150,000.00	\$ 146,343.00
Year 4 – FYE 2024	\$ 104,500.00	\$ 135,000.00	\$ 158,600.00	\$ 155,000.00	\$ 148,539.00
Year 5 – FYE 2025	\$ 107,500.00	\$ 139,000.00	\$ 163,400.00	\$ 160,000.00	\$ 150,767.00
	<b>\$ 507,500.00</b>	<b>\$ 669,000.00</b>	<b>\$ 770,300.00</b>	<b>\$ 750,000.00</b>	<b>\$ 731,880.00</b>
	30	25	10	15	20