



AUDITOR SELECTION COMMITTEE EVALUATION MEETING AGENDA

September 20, 2023 at 4:00 PM

Council Chambers – 340 Ocean Drive and YouTube

NOTICE: *Persons with disabilities requiring accommodations in order to participate in the meeting should contact Caitlin E. Copeland-Rodriguez, Town Clerk, at least 48 hours in advance to request such accommodations.*

Join Zoom Meeting

<https://us06web.zoom.us/j/86834321305?pwd=aTJJRk5VR3phRG1mV0IraGNGWEFmZz09>

Meeting ID: 868 3432 1305

Passcode: 959158

CALL TO ORDER

DISCUSSION ITEMS

- 1.** Discussion on Submittals for Audit Services, Finals Ranking, and Recommendation to the Town Council

ADJOURNMENT



AGENDA ITEM

Meeting Name: Audit Selection Committee Evaluation Meeting
Meeting Date: September 20, 2023
Prepared By: C. Copeland-Rodriguez, Town Clerk
Item Title: Discussion on Submittals for Audit Services, Finals Ranking, and Recommendation to the Town Council

DISCUSSION:

The Committee will be discussing the submitted proposals for Audit Services, conduct a final ranking, and provide a recommendation to the Town Council.

This item is scheduled to appear before the Town Council on Wednesday, September 27, 2023.



Town of Juno Beach
AUDITOR SELECTION COMMITTEE EVALUATION TABULATION
September 20, 2023

Request for Proposal: Audit Services

| Firm <i>(in alphabetical order)</i> | Scoring Criteria Tabulation | | | | |
|--|-----------------------------|----|----|----|-------|
| | #1 | #2 | #3 | #4 | Total |
| Grau & Associates | | | | | |
| Mauldin & Jenkins | | | | | |
| Templeton & Company | | | | | |

| | Max. Points | Category |
|----|-------------|--|
| #1 | 60 | <p><i>Qualifications and Experience/Ability of Professional Personnel</i></p> <ul style="list-style-type: none"> • Quality of the professional personnel to be assigned to the engagement and the quality of the firm’s management and support personnel; • Availability of qualified personnel; • Audit firm meets applicable independence criteria; • Key personnel receive adequate continuing professional education; • Evidence of licensing, completion of quality control review; • Demonstrated experience in performing quality municipal audits; • The firm’s past experience and performance with auditing and preparing an ACFR; • Technological capabilities; and • References. |
| #2 | 20 | <p><i>Audit Approach</i></p> <ul style="list-style-type: none"> • Adequacy of the overall audit plan for the engagement; • Approach to documentation and review of the comprehensive framework of internal and administrative controls; • Adequacy of proposed staffing plan (hours, level, and percentage of time) for the various segments of the engagement; • Adequacy of sampling techniques; • Adequacy of analytical procedures; and • Ability to meet time frames and delivery dates. |
| #3 | 15 | <p><i>Other</i></p> <ul style="list-style-type: none"> • Overall completeness, clarity, and quality of proposal; • Evidence of insurance coverage; • Volume of work in progress; and • Location of firm. |
| #4 | 5 | <p><i>Fee</i></p> <ul style="list-style-type: none"> • Completed Fee Schedule Worksheet; • Pricing Structure; and • Additional fees. |