

# TUCSON UNIFIED SCHOOL DISTRICT

## PURCHASING DEPARTMENT

### MEMORANDUM

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**DATE:** February 1, 2018

**TO:** Procurement File

**FROM:** Kevin Startt  
Director of Purchasing

**SUBJECT:** Executive Summary – Request For Proposal No. 18-53-22  
Financial and Compliance Audit Services

**Department:** Finance **Date Issued:** November 21, 2017  
**Proposal Due Date:** Initially December 12, 2017  
Amended to December 15, 2017

#### BACKGROUND

It is the intention of the Tucson Unified School District to enter into a contract with a qualified Certified Public Accountant(s) to conduct an annual audit of financial transactions and accounts kept by or for the District for the years ending June 30, 2018, 2019, 2020, 2021 and 2022, and to complete the Uniform System of Financial Records (USFR) Compliance Questionnaire. Evaluation criteria recommended by the Arizona Auditor General were incorporated into the specifications/scope of work.

#### EVALUATION

Request for Proposals 18-53-22 was posted to [www.azpurchasing.org](http://www.azpurchasing.org) TUSD's official bid service. Notice was sent to all 26 vendors in the category of Professional Services – Auditors. Legal Notice was posted two times in the Daily Territorial as required by the AZ Admin Code.

A committee was formed to evaluate the proposals based upon the selection criteria set forth in the original RFP. The committee was comprised of the members listed below. The required Committee Member Statements for confidentiality and conflict of interest were received from all. District procedures for evaluation of proposals by a committee were received and reviewed by all committee members.

Demetrius Lee, TUSD Internal Auditor, Chairperson  
Darin Guthrie, Audit Committee Member  
Chuck Kill, Audit Committee Member  
Jim Lovelace, Audit Committee Member  
Rachael Wall, Audit Committee Member  
Christina Cruz, TUSD Senior Accounting Manager  
Amanda Perkins, University of Arizona Internal Auditor

TUSD received one bid and six (6) "NO BIDS". Prior to releasing the proposal to the committee, I conducted an initial review of the proposal to ensure that all requested information had been submitted. At the initial committee meeting on December 18, 2017, each committee received their proposal and scoring sheet. Instructions were to individually review and score the proposal prior to the next committee meeting. The committee met again on January 11, 2018 for group review and scoring. Pending answers to clarifying questions from the committee,

award was recommended to the single vendor who submitted a proposal – Clifton Larson Allen. Upon receipt of answers to the clarifying questions, the Committee Chairperson submitted the recommendation letter.

**AWARD RECOMMENDATION:**

Contract award is recommended to the following firm for the indicated services:

**Clifton Larson Allen**

In accordance with Arizona Administrative Code R7-2-1032 (Only One Bid Received), I have determined that the single bidder is responsible. It has also been determined that the price submitted is fair and reasonable, and that other bidders had reasonable opportunity to respond. I attest that the evaluation process was conducted in accordance with Arizona Administrative Code R7-2-1041 (Competitive Sealed Proposals) and all applicable Tucson Unified School District rules and regulations.

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Kevin Startt, Director of Purchasing

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Date