



Award Recommendation

To: Marilyn Jackson
Contract Management

From: Susan Morgan
Chief Financial Officer, Finance

Date: May 4, 2023

Re: Financial Auditing Services provided by Whitley Penn, LLP

This award recommendation is for the City of Round Rock – Finance to establish a contract with Whitley Penn, LLP for financial auditing services needed to support City operations.

The RFP solicitation was advertised in the Round Rock Leader newspaper and posted to the City of Round Rock solicitation website. A total of 20 vendors were contacted and a total of 5 vendor responses were received. It has been determined that Whitley Penn, LLP offers the best value to the City, therefore Finance recommends the contract be awarded to Whitley Penn, LLP for financial auditing services required to support City operations.

An evaluation team with expertise in this area evaluated the offers and scored Whitley Penn, LLP as the best to provide these services based on the Respondent’s solution, company experience, and cost.

Respondents and point distribution are listed below based on a 100-point scale:

Whitley Penn, LLP:	91 pts
Weaver and Tidell, LLP:	87 pts
RSM US LLP:	83 pts
Pattillo, Brown & Hill, LLP:	81 pts
Belt Harris Pechacek, LLLP:	78 pts

Awarded Vendor: Whitley Penn, LLP
3737 Buffalo Speedway, Suite 1600
Houston, TX 77098

Contract Term: 5 years

Contract Amount: Total not to exceed amount of \$557,210

Approvals:


Susan Morgan (May 4, 2023 10:17 CDT)


Signed Name

05/04/2023

Date:

Printed Name: Susan Morgan
Chief Financial Officer, Finance

Purchasing Review


David Carter (May 4, 2023 10:31 CDT)

Signed Name

05/04/2023

Date:

Printed Name: David Carter
Purchasing Manager, Finance











6.1 Award Recommendation Memo- Whitley Penn

Final Audit Report

2023-05-04

Created:	2023-05-04 (Central Daylight Time)
By:	Adam Gagnon (agagnon@roundrocktexas.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAJKwtcMdZTEUe2RmgLpizdXUCRbyYePjG

"6.1 Award Recommendation Memo- Whitley Penn" History

-  Document created by Adam Gagnon (agagnon@roundrocktexas.gov)
2023-05-04 - 9:59:23 AM CDT
-  Document emailed to Cheryl Kaufman (ckaufman@roundrocktexas.gov) for approval
2023-05-04 - 10:00:29 AM CDT
-  Email viewed by Cheryl Kaufman (ckaufman@roundrocktexas.gov)
2023-05-04 - 10:00:53 AM CDT
-  Document approved by Cheryl Kaufman (ckaufman@roundrocktexas.gov)
Approval Date: 2023-05-04 - 10:09:31 AM CDT - Time Source: server
-  Document emailed to Susan Morgan (smorgan@roundrocktexas.gov) for signature
2023-05-04 - 10:09:32 AM CDT
-  Email viewed by Susan Morgan (smorgan@roundrocktexas.gov)
2023-05-04 - 10:17:27 AM CDT
-  Document e-signed by Susan Morgan (smorgan@roundrocktexas.gov)
Signature Date: 2023-05-04 - 10:17:52 AM CDT - Time Source: server
-  Document emailed to David Carter (dcarter@roundrocktexas.gov) for signature
2023-05-04 - 10:17:53 AM CDT
-  Email viewed by David Carter (dcarter@roundrocktexas.gov)
2023-05-04 - 10:30:58 AM CDT
-  Document e-signed by David Carter (dcarter@roundrocktexas.gov)
Signature Date: 2023-05-04 - 10:31:18 AM CDT - Time Source: server



✔ Agreement completed.

2023-05-04 - 10:31:18 AM CDT



Powered by
Adobe
Acrobat Sign