



COMMISSIONERS COURT COMMUNICATION

REFERENCE NUMBER _____

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DATE: 09/04/2024

**SUBJECT: RFP NO. F2024132 - SERVICE ORGANIZATION CONTROLS AUDIT
- TAX OFFICE - WHITLEY PENN LLP - PER CONTRACT TERMS**

COMMISSIONERS COURT ACTION REQUESTED

It is requested that the Commissioners Court award RFP No. F2024132, Service Organization Controls Audit, for the Tax Office, to Whitley Penn LLP at the per contract terms.

BACKGROUND

Notice of the County's intent to bid was advertised in local newspapers, as required by State statute, and posted on the Internet, the Arlington Black Chamber of Commerce, the Fort Worth Hispanic Chamber of Commerce, the Fort Worth Metropolitan Black Chamber of Commerce, and the Tarrant County Asian American Chamber of Commerce. One hundred ninety-nine (199) vendors were contacted and requested to participate in this proposal process. All documents pertaining to this RFP were posted on the Tarrant County website and were downloaded by interested parties. A pre-proposal conference held on June 6, 2024 was attended by ten (10) vendors as well as representatives from the Tax Office and Purchasing. Eleven (11) proposals were received.

Proposals were evaluated by the Tax Office and Purchasing representatives. Evaluations were based upon the criteria and processes set forth in the RFP.

The highest scoring vendor, Whitley Penn, LLP, was invited to provide a Best and Final Offer on July 18, 2024. This resulted in a \$2,000.00 price reduction to a final proposed price of \$38,000.00 from the originally proposed price of \$40,000.00.

The proposal received from Whitley Penn LLP meets all specifications and is acceptable to the Tax Office.

The purpose of this contract is to purchase a Service Organization Controls Audit for the Tax Collector/Assessor Office in compliance with requirements outlined in the Statement on Standards for Attestation Engagements (SSAE) No. 18 Audit, SOC 1 Type 2. The Tax Office conducts these audits once every four (4) years as part of their best practice procedures.

Therefore, it is the joint recommendation of the Tax Office and Purchasing that RFP No. F2024132, Service Organization Controls Audit, be awarded to Whitley Penn LLP at the per contract terms.

SUBMITTED BY:	Purchasing	PREPARED BY: APPROVED BY:	James Bocks, CPPB Chris Lax, CPSD, CPSM, CPCP
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FISCAL IMPACT

Funding in the amount of \$38,000.00 is requested to be available in account 10000-2025 General Fund/1310100000 Tax Administration/569011 Professional Services.