



Notice of Intent to Award

Solicitation Number	356257	Award Date	10/16/2023 4:15 PM CDT
Solicitation Title	Consulting and Auditing Services		
Buyer Name	Scott Ferguson	Buyer Email	scott.ferguson@nashville.gov
BAO Rep	JoeAnn Carr	BAO Email	joeann.carr@nashville.gov

Awarded Supplier(s)

In reference to the above solicitation and contingent upon successful contract negotiation, it is the intent of the Metropolitan Government of Nashville and Davidson County to award to the following supplier(s):

Company Name	KraftCPAs PLLC	Company Contact	Scott Nally	
Street Address	555 Great Circle Road			
City	Nashville	State	TN	Zipcode 37228
Company Name	Berry, Dunn, McNeil & Parker dba Berry Dunn	Company Contact	Bill Brown	
Street Address	100 Middle Street			
City	Portland	State	ME	Zipcode 04102
Company Name	Frazier & Deeter, LLC	Company Contact	Charlie Varon	
Street Address	222 2nd Ave S			
City	Nashville	State	TN	Zipcode 37201

Certificate of Insurance

The awarded supplier(s) must submit a certificate of insurance (COI) indicating all applicable coverage required by the referenced solicitation. The COI should be emailed to the referenced buyer no more than 15 days after the referenced award date.

Equal Business Opportunity Program

Where applicable, the awarded supplier(s) must submit a signed copy of the letter of intent to perform for any and all minority-owned (MBE) or woman-owned (WBE) subcontractors included in the solicitation response. The letter(s) should be emailed to the referenced business assistance office (BAO) rep no more than two business days after the referenced award date.

Yes, the EBO Program is applicable. No, the EBO Program is not applicable.

Monthly Reporting

Where applicable, the awarded supplier(s) will be required monthly to submit evidence of participation and payment to all small (SBE), minority-owned (MBE), women-owned (WBE), LGBT-owned (LGBTBE), and service disabled veteran owned (SDV) subcontractors. Sufficient evidence may include, but is not necessarily limited to copies of subcontracts, purchase orders, applications for payment, invoices, and cancelled checks.

Questions related to contract compliance may be directed to the referenced BAO rep.

Yes, monthly reporting is applicable. No, monthly reporting is not applicable.

Public Information and Records Retention

Solicitation and award documentation are available upon request. Please email the referenced buyer to arrange.

A copy of this notice will be placed in the solicitation file and sent to all offerors.

Right to Protest

Per MCL 4.36.010 – any actual or prospective bidder, offeror, or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the purchasing agent. The protest shall be submitted in writing within ten (10) days after such aggrieved person knows or should have known of the facts giving rise thereto.

Mdl Supervisor (Initial)

Michelle A. Hernandez Lane
Michelle A. Hernandez Lane
Purchasing Agent & Chief Procurement Officer



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Buyer Name	Scott Ferguson	Buyer Email	scott.ferguson@nashville.gov
BAO Rep	JoeAnn Carr	BAO Email	joeann.carr@nashville.gov

Awarded Supplier(s)

In reference to the above solicitation and contingent upon successful contract negotiation, it is the intent of the Metropolitan Government of Nashville and Davidson County to award to the following supplier(s):

Company Name	UHY Advisors Mid Atlantic, Inc	Company Contact	Shawn Kennedy	
Street Address	1889 General George Patton Dr, Suite #200			
City	Franklin	State	TN	Zipcode 37067
Company Name		Company Contact		
Street Address				
City		State		Zipcode
Company Name		Company Contact		
Street Address				
City		State		Zipcode

Certificate of Insurance

The awarded supplier(s) must submit a certificate of insurance (COI) indicating all applicable coverage required by the referenced solicitation. The COI should be emailed to the referenced buyer no more than 15 days after the referenced award date.

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Yes, the EBO Program is applicable. No, the EBO Program is not applicable.

Monthly Reporting

Where applicable, the awarded supplier(s) will be required monthly to submit evidence of participation and payment to all small (SBE), minority-owned (MBE), women-owned (WBE), LGBT-owned (LGBTBE), and service disabled veteran owned (SDV) subcontractors. Sufficient evidence may include, but is not necessarily limited to copies of subcontracts, purchase orders, applications for payment, invoices, and cancelled checks.

Questions related to contract compliance may be directed to the referenced BAO rep.

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A copy of this notice will be placed in the solicitation file and sent to all offerors.

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Michelle Hernandez Lane
 Supervisor (Initial)
 Michelle A. Hernandez Lane
 Purchasing Agent & Chief Procurement Officer

RFQ# 356257- Consulting and Auditing Services							
Evaluation Criteria	Accenture LLP	Berry, Dunn, McNeil & Parker LLC dba BerryDunn	CliftonLarsonAllen LLP	Frazier & Deeter, LLC	KraftCPAs PLLC	MGT of America Consulting, LLC	UHY Advisors Mid-Atlantic, Inc
Round 1							
Solicitation Acceptance	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Contract Acceptance	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ISA Questionnaire Completed and Terms Accepted	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Firm Experience (35 Points)	25	33	31	32	34	25	31
Team Experience (35 Points)	24	33	32	33	35	27	33
Project Approach and Process (30 Points)	23	29	18	27	30	25	26
Round 1 Totals	72	95	81	92	99	77	90

Strength & Weaknesses

Accenture LLP

Firm Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately demonstrate their firm's knowledge in the provisions of services related to this project. Q#4 - Firm did not provide adequate response. Q#5 - Firm did not provide enough details in their response.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately describe the proposed team and the role to be played by each member. Q#2 - Firm did not adequately demonstrate relevant experience of proposed team members including resumes. Q#4 - Firm did not adequately provide all professional certifications their team members have. Q#5 - Firms projects were not of similar scope to this project.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately demonstrate how the requirements and provisions of the scope of this project will be implemented. Q#4 - Firm's description of their most recent external or self assessment of the system of quality control within their organization. Q#5 - Firm did not demonstrate efficient use of resources for completing the project efficiently within the constraints outlined in the scope. Q#6 - Firm's rate sheet.

Berry, Dunn, McNeil & Parker LLC dba BerryDunn

Firm Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#3 - Firm did not adequately describe in detail how their firm is structured to ensure timely delivery of these services.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm did not adequately demonstrate the relevant experience of proposed team members.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm's description of the quality control system for non audit services.

CliftonLarsonAllen LLP

Firm Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately demonstrate their firm's knowledge in the provisions of services related to this project. Q#4 - Firm did not provide adequate response. Q#6 - Firm's list of subject areas of expertise/centers of excellence.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately describe the proposed team and the role to be played by each member. Q#4 - Firm did not adequately provide all professional certifications their team members have. Q#5 - Firms projects were not of similar scope to this project.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately demonstrate how the requirements and provisions of the scope of this project will be implemented. Q#2 - Firm's description of the quality control system for audit services. Q#6 - Firm's rate sheet.

Frazier & Deeter, LLC**Firm Experience (35 Points)**

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm did not adequately demonstrate their firm's financial and personnel capacity to perform the work. Q#3 - Firm did not adequately describe how their firm is structured to ensure timely delivery of these services.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately describe the role to be played by the subcontractors.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm's response did not adequately demonstrate how the requirements and provisions of the scope of the project will be implemented. Q#2 - Firm's description of the quality control system for audit services. Q#5 - Firm's projects lacked dollar value details.

KraftCPAs PLLC**Firm Experience (35 Points)**

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#1 - Firm demonstrated their firm's knowledge in the provision of services related to the project.

Weaknesses Q#4 - Firm did not provide adequate response.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#2 - Firm demonstrated relevant experience of proposed team members.

Weaknesses No weaknesses were noted.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses No weaknesses were noted.

MGT of America Consulting, LLC**Firm Experience (35 Points)**

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm did not adequately demonstrate their firm's financial and personnel capacity to perform the work. Q#3 - Firm did not adequately describe in detail how their firm is structured to ensure timely delivery of these services. Q#4 - Firm did not adequately provide all professional certifications their team members have. Q#5 - Firm's projects were not of similar scope to this project.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately describe the proposed team and the role to be played by each member. Q#2 - Firm demonstrated relevant experience of proposed team members. Q#4 - Firm did not adequately provide all professional certifications their team members have.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm's description of the quality control system for audit services. Q#5 - Firm did not demonstrate efficient use of material resources, equipment and technology necessary for completing the project efficiently.

UHY Advisors Mid-Atlantic, Inc**Firm Experience (35 Points)**

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#2 - Firm's personnel capacity to perform the work.

Weaknesses Q#1 - Firm did not adequately demonstrate their firm's knowledge in the provisions of services related to this project.

Team Experience (35 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#1 - Firm did not adequately describe the proposed team and the role to be played by each member.

Project Approach and Process (30 Points)

Strengths Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses Q#2 - Firm's description of the quality control system for audit services. Q#3 - Firm's description of the quality control system for non-audit services.

Ferguson, Scott (Finance)

From: Carr, Joe Ann (Finance - Contract Compliance)
Sent: Thursday, October 12, 2023 2:27 PM
To: Ferguson, Scott (Finance)
Cc: Wood, Christopher (Finance - Procurement); Frye, Jeremy (Finance)
Subject: RFQ#356257 Consulting and Auditing Services; EBO Determination and SBE Assessment
Attachments: Frazier & Deeter, LLC MWBE Utilization.pdf; Kraft CPAs MWBE Utilization.pdf; UHY MWBE Utilization.pdf; Berry,Dumn MWBE Utilization.pdf; 356257 SBE Assessment.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

Scott,

Please see the attached MWBE Utilization forms and SBE/SDV Assessment for this solicitation. The proposers appear to be compliant with the Equal Business Opportunity Program goals and the SBE program requirements. This solicitation will require monitoring in the B2Gnow system.

Please contact me with questions.

Thanks,

JoeAnn Carr
Department of Finance
Office of Minority and Women Business Assistance (BAO)
Metropolitan Government of Nashville and Davidson County
730 2nd Avenue South, 2nd Floor; PO Box 196300
Nashville, TN 37219-6300
(p) [615-880-2338](tel:615-880-2338) (f) [615-862-6175](tel:615-862-6175)



Statement of M/WBE Utilization

Proposer's/Firm's Name: KraftCPAs, PLLC	Proposer's Phone #: 615-782-4252
Solicitation Title: Consulting and Auditing Services	Proposer's Email Address: snalley@kraftCPAs.com
Solicitation #: 356257	Amount Self-performed : up to 80%
Proposer's/Firm's Ownership: Non-M/WBE	Total Bid Amount: Unknown
Proposed EBO Goal (%) : 15 MBE% 5 WBE%	EBO Goal Met? (Y/N) YES

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

				Certificate							
MBE/WBE Firm Name		MBE/WBE Firm Address		Phone/E-Mail		Type (MBE or WBE)	* MBE/WBE Group Type *	Code # UNSPS/NAICS	Description of Work	MBE/WBE Dollars (\$)	Percent of Total Contract
1	Hoskins & Company, PC	1900 church St., Nashville, TN 37203		615-321-7333		MBE	1	8411/541219	Performance of Internal Audit Work	TBD	15%
2	Thomason Financial Resources, Inc.	1009 Harding Trace Ct., Nashville TN 37221		615-673-7307		WBE	5	8411/541219	Performance of Internal Audit Work	TBD	5%
3						Select	Select				
4						Select	Select				
5						Select	Select				
6						Select	Select				
7						Select	Select				

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature) Scott J. Nalley, Member,	Date 09/05/2023
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*Note: MWBE is defined as business enterprise maintaining a significant business presence in the Program Area & performing a commercial useful function that is owned by one or more of the following: (1) African Americans (2) Native Americans, (3) Hispanic Americans, (4) Asian Americans, and (5) Women.

Has Prime Complied with EBO Goal? YES <input type="checkbox"/>	For Internal Office Use ONLY If No, Good Faith Efforts Met? BAO Only
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BAO Representative: JoeAnn Carr **Metro Buyer:** Scott Ferguson **Project Manager:** Lauren Riley **Date:** 10/10/23

Total MBE Subcontracting	15 _____ %	§ INDEFINITE (IDIQ)
Total WBE Subcontracting	5 _____ %	§ INDEFINITE (IDIQ)
Total MBE/WBE Participation:	20 _____ %	§ INDEFINITE (IDIQ)

BAO Notes:



Statement of M/WBE Utilization

Proposer's/Firm's Name: Berry, Dunn, McNeil & Parker, LLC	Proposer's Phone #: 207-541-2200
Solicitation Title: Consulting and Auditing Services	Proposer's Email Address: pqcv@berrydunn.com
Solicitation #: 356257	Amount Self-performed: 0%
Proposer's/Firm's Ownership: Non-M/WBE	Total Bid Amount: \$0
Proposed EBO Goal (%) : <u>15</u> MBE% <u>0</u> WBE%	EBO Goal Met? (Y/N) YES <input type="checkbox"/>

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

MBE/WBE Firm Name		MBE/WBE Firm Address	Phone/E-Mail	Certificate Type (MBE or WBE)	* MBE/WBE Group Type *	Code # UNSPS/NAICS	Description of Work	MBE/WBE Dollars (\$)	Percent of Total Contract
1	KBMD	315 10th Ave. N, Suite 118, Nashville, TN 37203	615-346-4016	MBE	4	84111600	Peformance	\$0	15%
2				Select	Select				
3				Select	Select				
4				Select	Select				
5				Select	Select				
6				Select	Select				
7				Select	Select				

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature) William H. Brown/Principal	Date 09/06/2023
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*Note: MWBE is defined as business enterprise maintaining a significant business presence in the Program Area & performing a commercial useful function that is owned by one or more of the following: (1) African Americans (2) Native Americans, (3) Hispanic Americans, (4) Asian Americans, and (5) Women.

Has Prime Complied with EBO Goal? YES <input type="checkbox"/>	For Internal Office Use ONLY	If No, Good Faith Efforts Met? BAO Only
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BAO Representative: JoeAnn Carr **Metro Buyer:** Scott Ferguson **Project Manager:** Lauren Riley **Date:** 10/10/23

Total MBE Subcontracting	<u>15</u> %	§ INDEFINITE (IDIQ)
Total WBE Subcontracting	<u>0</u> %	§ <u>0</u>
Total MBE/WBE Participation:	<u>15</u> %	§ INDEFINITE (IDIQ)

BAO Notes:



Statement of M/WBE Utilization

Proposer's/Firm's Name: Frazier & Deeter, LLC	Proposer's Phone #: 615-416-6800
Solicitation Title: Consulting and Auditing Services	Proposer's Email Address: brandon.sherman@frazierdeeter.com
Solicitation #: 356257	Amount Self-performed : 80
Proposer's/Firm's Ownership: Non-M/WBE	Total Bid Amount: \$255,000
Proposed EBO Goal (%) : 15 MBE% 0 WBE%	EBO Goal Met? (Y/N) YES

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

	MBE/WBE Firm Name	MBE/WBE Firm Address	Phone/E-Mail	Certificate		Code # UNSPS/NAICS	Description of Work	MBE/WBE Dollars (\$)	Percent of Total Contract
				Type (MBE or WBE)	* MBE/WBE Group Type *				
1	KBMD Certified Public Accountants	315 10th Ave. N, Suite 118, Nashville, TN 37203	(615) 346-4016	MBE SBE	1	84111603 internal audit	Internal Audit	25,500	10%
2	Dimeta Smith CPA LLC	3354 Perimeter Hill Dr #112, Nashville, TN 37211	(615) 953-1167	WBE	5	84111603 internal audit	Internal Audit	0	0
3	Acuvity Consulting	5412 Mollie Cir, Livermore, CA 95441	(267) 979 7000	MBE	4	84111603 internal audit	Internal Audit	12,750	5%
4	Dimeta Smith CPA LLC	3354 Perimeter Hill Dr #112, Nashville, TN 37211	(615) 953-1167	MBE	1	84111603 internal audit	Internal Audit	12,750	5%
5				Select	Select		Total SBE	12,750	5%
6				Select	Select		Total MBE	38,250	15%
7				Select	Select				

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature) Brandon Sherman, Partner	Date 09/06/2023
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*Note: MWBE is defined as business enterprise maintaining a significant business presence in the Program Area & performing a commercial useful function that is owned by one or more of the following: (1) African Americans (2) Native Americans, (3) Hispanic Americans, (4) Asian Americans, and (5) Women.

Has Prime Complied with EBO Goal? YES <input type="checkbox"/>	For Internal Office Use ONLY If No, Good Faith Efforts Met? BAO Only
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BAO Representative: JoeAnn Carr **Metro Buyer:** Scott Ferguson **Project Manager:** Lauren Riley **Date:** 10/10/23

Total MBE Subcontracting	20 _____ %	§ INDEFINITE (IDIQ)
Total WBE Subcontracting	0 _____ %	§ 0
Total MBE/WBE Participation:	20 _____ %	§ INDEFINITE (IDIQ)

BAO Notes:



Statement of M/WBE Utilization

Proposer's/Firm's Name: UHY ADVISORS MID-ATLANTIC, INC.	Proposer's Phone #: 410-423-4832
Solicitation Title: Consulting and Auditing Services	Proposer's Email Address: jreagan@uhy-us.com
Solicitation #: 356257	Amount Self-performed : 80%
Proposer's/Firm's Ownership: Non-M/WBE	Total Bid Amount: Award Dependent
Proposed EBO Goal (%) : 15 MBE% _____ WBE%	EBO Goal Met? (Y/N) YES

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

MBE/WBE Firm Name		MBE/WBE Firm Address		Phone/E-Mail		Certificate	Code #	Description of Work	MBE/WBE Dollars (\$)	Percent of Total Contract	
						Type (MBE or WBE)					* MBE/WBE Group Type *
1	Ruffin P.C.	110 Glancy Street, Ste. 107 Goodlettsville, TN 37072		615-528-1110		MBE	1	84110000/541200	Consulting & Accounting	TBD	20
2						Select	Select				
3						Select	Select				
4						Select	Select				
5						Select	Select				
6						Select	Select				
7						Select	Select				

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature) Jack Reagan, Managing Director	Jack Reagan	Digitally signed by Jack Reagan Date: 2023.09.18 12:04:19 -04'00'	Date	08/06/2023
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Has Prime Complied with EBO Goal? YES	For Internal Office Use ONLY	If No, Good Faith Efforts Met? BAO Only
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BAO Representative: JoeAnn Carr **Metro Buyer:** Scott Ferguson **Project Manager:** Lauren Riley **Date:** 10/10/23

Total MBE Subcontracting	20 _____ %	§ INDEFINITE (IDIQ)
Total WBE Subcontracting	0 _____ %	§ 0
Total MBE/WBE Participation:	20 _____ %	§ INDEFINITE (IDIQ)

BAO Notes: