



Date: December 7, 2018

To: All Respondents

From: Courtney Everett, Deputy Auditor
Indiana Auditor of State

Re: Selection Recommendation for Request for Services 19-048, County Abstract and Semi-Annual Settlement Review Services

Two Year Contract: \$475,000.00

Based on the evaluation of responses to Request for Service (“RFS”) 19-018, it is the evaluation team’s recommendation that Crowe LLP be selected to begin contract negotiations to deliver County Abstract and Semi-Annual Settlement Review Services for the Indiana Auditor of State.

Terms of this recommendation are included in this letter.

The evaluation team received proposals from three (3) vendors:

- Crowe LLP
- GS1 Consulting LLC
- Reedy Financial Group P.C.

According to the following criterions, which were published in Section 3, Proposal Evaluation, of the RFS, proposals were evaluated by the Indiana Auditor of State (“AOS”) and scored by the evaluation team:

- Adherence to Requirements (Pass/Fail)
- Quality of Overall Proposal (10 points)
- Knowledge of Indiana Property Tax Systems (20 points)
- Quality of Corporate Experience and Stability (15 points)
- Quality of Team Member Experience and References (20 points)
- Cost (20 points)
- Quality of Short-List Presentations (15 points)

The proposals were evaluated according to the published process outlined in Section 3.2, “Evaluation Criteria, of the RFS. Scoring was completed as follows:

A. Adherence to Requirements

The proposals were reviewed for adherence to mandatory requirements. The Respondents met these requirements and were then evaluated based on the Selection Criteria and cost proposal.



B. Initial Round Scores

The team considered each Respondent’s ability to serve the State regarding the criteria outlined above. The evaluation team’s scores were based on a review of the Respondent’s proposed approach to the Selection Criteria and responses to any clarifications.

Cost scores were normalized based on the lowest cost proposal evaluated. The lowest cost proposal, relative to their total cost, received a total of 20 points. Other proposals received scores based on the following normalization formula where the total cost of the proposal remains the respondent’s total cost:

Respondent’s Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 20 points

The results of the initial Selection Criteria and Cost Scores for this step of the evaluation process as defined in the RFS, out of a maximum 85 points, are tabulated in Table 1 below.

Table 1: Initial Selection Criteria + Cost Score

Respondent	MAQ Score (65 Max)	Cost Score (20 max)	Total Score (85 max)
Crowe LLP	62.20	16.31	78.51
GS1 Consulting LLC	12.00	9.50	21.50
Reedy Financial Group P.C.	58.20	20.00	78.20

There was a clear and natural break among the respondents. As such, GS1 Consulting LLC was eliminated.

The remaining two respondents were deemed viable for contract award and advanced to the On-Site Presentation round.

C. On-Site Presentation

The Respondents were instructed to address specific topics, display their proposed solution and answer questions based on a uniform agenda. In doing so, the Respondents were requested to send knowledgeable representatives to discuss their proposals as outlined in their responses. Respondents were encouraged to send representatives who would participate on the project team.

The evaluation team’s scores were based on a review of the Respondent’s proposed approach to the Selection Criteria, On-Site presentation and answers to any subsequent clarifications. A Best and Final Offer (“BAFO”) was requested and the updated scoring is reflected in Table 2 below.

Table 2: Oral Presentation MAQ + Cost Score

Respondent	MAQ Score (80 Max)	Cost Score (20 max)	Total Score (100 max)
Crowe LLP	78.60	20.00	98.60
Reedy Financial Group P.C.	74.60	20.00	94.60



Award Summary

During the course of evaluation, the state scrutinized the proposals to determine the viability of the proposed business solutions to meet the goals of the program and to meet the needs of the State. The team evaluated the proposals based on the stipulated criteria outlined in the RFS.

The term of the contract shall be for a period of two (2) years from the date of contract execution. There may be additional extensions at the State's option.