



THE CITY OF KEY WEST

References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Alberni Caballero + Co.  
Client Reference Name: Village of Miami Shores  
Client Contact: Holly Houghdahl  
Client Phone: 305.762.4855  
Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>-</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Nestor Caballero  
Date of Services: 3 years  
Dollar Amount for Services: 45 K  
Overall Comments: Partner does come out on the job



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Alberns, Caballero + Co.  
 Client Reference Name: City of Hialeah  
 Client Contact: Juan Rivera  
 Client Phone: 305.558.4114 x 213  
 Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Nestor  
 Date of Services: 7 years  
 Dollar Amount for Services: 50,000.-  
 Overall Comments: \_\_\_\_\_  
 \_\_\_\_\_



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Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Carr Riggs Ingram  
Client Reference Name: City of Largo  
Client Contact: Joe Ciurro - AFD  
Client Phone: 727. 587. 6747  
Date: 7/26/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>9</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>9</u>
4) Level of Satisfaction with customer service	<u>9</u>
5) Company's support for its employees and training offered	<u>9</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>9</u>
Total	<u>55/60</u>

Audit Firm Contact: Charles Whetstone  
Date of Services: FY12  
Dollar Amount for Services: \$65,000.-  
Overall Comments: \_\_\_\_\_  
\_\_\_\_\_



## THE CITY OF KEY WEST

### References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Carr Riggs Ingram  
Client Reference Name: Utility Board of Key West  
Client Contact: Kim Free  
Client Phone: 295-1000  
Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	_____
2) Supervisor and Manager professionalism and leadership	_____
3) Responsiveness to request	_____
4) Level of Satisfaction with customer service	_____
5) Company's support for its employees and training offered	_____
6) Overall satisfaction with performance and likelihood of rehiring	_____
Total	_____

Audit Firm Contact: \_\_\_\_\_

Date of Services: \_\_\_\_\_

Dollar Amount for Services: \_\_\_\_\_

Overall Comments: Have no record of ever using  
the firm.



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Carr Riggs + Ingram  
 Client Reference Name: City of New Port Richey  
 Client Contact: Doug Haces  
 Client Phone: 727.853.1053  
 Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>8.5</u>
2) Supervisor and Manager professionalism and leadership	<u>9.5</u>
3) Responsiveness to request	<u>8.5</u>
4) Level of Satisfaction with customer service	<u>8.5</u>
5) Company's support for its employees and training offered	<u>8.5</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>8.5</u>
Total	<u>435/50</u>

Audit Firm Contact: Chad Whetsstone  
 Date of Services: starting 3rd yr.  
 Dollar Amount for Services: n/a  
 Overall Comments: willing to go the extra mile



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References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Cherry Belsart  
Client Reference Name: City of Islamorada  
Client Contact: Marcia Aguilar  
Client Phone: 664.6445  
Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>9</u>
2) Supervisor and Manager professionalism and leadership	<u>9</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>48/50</u>

Audit Firm Contact: Lonnie Kehoe  
Date of Services: 5 years  
Dollar Amount for Services: 47 K  
Overall Comments: Hopes contract is renewed



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Cherry Belkaert  
 Client Reference Name: City of Pinellas Park  
 Client Contact: Sonny Kotala  
 Client Phone: 727.541.0700  
 Date: 7-26-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>60</u>

Audit Firm Contact: John Gilberto  
 Date of Services: many years 2003-2012  
 Dollar Amount for Services: 65,000.-  
 Overall Comments: Very happy, have renewed  
for many years



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References  
Past Performance Evaluation Questionnaire  
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Audit Firm Name: Cherry Bekkert  
Client Reference Name: Monroe Co. (Sheriff's Office)  
Client Contact: Lisa Knowles  
Client Phone: 809.3017  
Date: 7.26.13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>60</u>

Audit Firm Contact: -  
Date of Services: 10+ years  
Dollar Amount for Services: in County budget  
Overall Comments: Very pleased





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References
Past Performance Evaluation Questionnaire
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Clifton Larson Allen LLP
Client Reference Name: Hardee County FL
Client Contact: Jeremy Chorstain
Client Phone: 863 773-4174
Date: 7/26/10

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Table with 2 columns: Criteria and Score. Rows include Experience and qualifications (10), Supervisor and Manager professionalism and leadership (10), Responsiveness to request (10), Level of Satisfaction with customer service (10), Company's support for its employees and training offered (10), Overall satisfaction with performance and likelihood of rehiring (10), and Total (60/60).

Audit Firm Contact: Michael Carter
Date of Services: over the past year
Dollar Amount for Services: did not have total
Overall Comments: Happy with service



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Clisten Larson Allen LLP  
 Client Reference Name: KW HA  
 Client Contact: Manny Castillo  
 Client Phone: 296-5621  
 Date: 7/26/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>9</u>
2) Supervisor and Manager professionalism and leadership	<u>9</u>
3) Responsiveness to request	<u>9</u>
4) Level of Satisfaction with customer service	<u>9</u>
5) Company's support for its employees and training offered	<u>2/9</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>9</u>
Total	<u>45/50</u>

Audit Firm Contact: Lance Schimdt  
 Date of Services: currently  
 Dollar Amount for Services: \$80,000.-  
 Overall Comments: Manny says he doesn't give 10's, always room for improvement.



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Clifton Larson Allen, LLP  
 Client Reference Name: City of Cape Coral  
 Client Contact: Margaret Koyum  
 Client Phone: 239. 242-3382  
 Date: 7/26/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again; and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	10
2) Supervisor and Manager professionalism and leadership	10
3) Responsiveness to request	10
4) Level of Satisfaction with customer service	10
5) Company's support for its employees and training offered	10
6) Overall satisfaction with performance and likelihood of rehiring	10
Total	60

- Audit Firm Contact: Marty Redovan, Partner, CPA, CVA
- Date of Services: 3 year contract covering the FY 2011, 2012, and 2013
- Dollar Amount for Services: For each year as follows: \$121,700; \$109,110 and \$94,629
- Overall Comments: We are intending to utilize an option provision to extend our contract with Clifton Larson Allen for an additional 2 years.



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## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: GLSC  
 Client Reference Name: City of Pembroke Pines  
 Client Contact: Lisa Chung  
 Client Phone: 954.435.6728  
 Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Pablo Llerena  
 Date of Services: 4 years  
 Dollar Amount for Services: \$ 95 K  
 Overall Comments: They are a small firm.



# THE CITY OF KEY WEST

## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name:                     OLSC                      
 Client Reference Name:                     City of Wilton Manors                      
 Client Contact:                     Bob Mays                      
 Client Phone:                     954. 390. 2143                      
 Date:                     7-29-13                    

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact:                     Wilbert Santos                      
 Date of Services:                     3 years                      
 Dollar Amount for Services:                     34 K.                      
 Overall Comments:                     Best firm he has used.                      
 \_\_\_\_\_



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Past Performance Evaluation Questionnaire  
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Audit Firm Name: Keefe, McCullough + Co  
Client Reference Name: City of Weston  
Client Contact: Dave Keller  
Client Phone: 954.385.2000  
Date: 7.29.13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Cindy Calvert  
Date of Services: 5+ years  
Dollar Amount for Services: 95.1K  
Overall Comments: Very happy, just renewed contract



# THE CITY OF KEY WEST

## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Keefe McCullough  
 Client Reference Name: City of Coconut Creek  
 Client Contact: Peta Gay-Lake  
 Client Phone: 954.973.6730  
 Date: 7/29/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Cindy Calvert  
 Date of Services: 7 years  
 Dollar Amount for Services: \$55<sup>1k</sup> audit 75<sup>1k</sup> CAFR  
 Overall Comments: \_\_\_\_\_  
 \_\_\_\_\_



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References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Keefe, McCullough & Co.  
Client Reference Name: City of Plantation  
Client Contact: Mary Deasley  
Client Phone: 954.797.2202  
Date: 7-26-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>60</u>

Audit Firm Contact: Cindy Calvert  
Date of Services: 30+ years  
Dollar Amount for Services: \$ 100 k  
Overall Comments: \_\_\_\_\_  
\_\_\_\_\_





THE CITY OF KEY WEST

References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Marcom  
Client Reference Name: FKAA  
Client Contact: Tim Esquinaldo  
Client Phone: 295-2206  
Date: 7/29/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Michael Futterman

Date of Services: 2 yrs.

Dollar Amount for Services: FY12 72.5 K FY13 74.7 K

Overall Comments: Very happy - able to tailor  
the audit including your concerns



# THE CITY OF KEY WEST

## References Past Performance Evaluation Questionnaire Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Marcum  
 Client Reference Name: City of West Palm Beach  
 Client Contact: Lynne Green  
 Client Phone: 561. 822. 1310  
 Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	<u>10</u>
2) Supervisor and Manager professionalism and leadership	<u>10</u>
3) Responsiveness to request	<u>10</u>
4) Level of Satisfaction with customer service	<u>10</u>
5) Company's support for its employees and training offered	<u>10</u>
6) Overall satisfaction with performance and likelihood of rehiring	<u>10</u>
Total	<u>50/50</u>

Audit Firm Contact: Michael Futterman + Enrique  
 Date of Services: 2 years  
 Dollar Amount for Services: 166K  
 Overall Comments: \_\_\_\_\_  
 \_\_\_\_\_



THE CITY OF KEY WEST

References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Nowlen Holt + Miner  
Client Reference Name: Town of Palm Beach  
Client Contact: Jane Struder  
Client Phone: 561.838.5444  
Date: 7-29-13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	9.5
2) Supervisor and Manager professionalism and leadership	9.5
3) Responsiveness to request	9
4) Level of Satisfaction with customer service	9
5) Company's support for its employees and training offered	9
6) Overall satisfaction with performance and likelihood of rehiring	9
Total	46/50

Audit Firm Contact: Ron Bennett  
Date of Services: 3 years  
Dollar Amount for Services: \_\_\_\_\_  
Overall Comments: \_\_\_\_\_



THE CITY OF KEY WEST

References  
Past Performance Evaluation Questionnaire  
Request for Proposal (RFP) 007-13 for External Audit Services

Audit Firm Name: Noulen Holt + Miner  
Client Reference Name: City of Boynton Beach  
Client Contact: Tim Howard  
Client Phone: 561.742.6312  
Date: 7/29/13

As a Client Reference, please evaluate the firm's performance using "1" through "10" (with a score of "10" meaning very satisfied and likely to hire again: and, with a score of "1" meaning very dissatisfied and unlikely to rehire)

Criteria	Score
1) Experience and qualifications	9
2) Supervisor and Manager professionalism and leadership	10
3) Responsiveness to request	9
4) Level of Satisfaction with customer service	9
5) Company's support for its employees and training offered	9
6) Overall satisfaction with performance and likelihood of rehiring	9
Total	55/60

Audit Firm Contact: Ron Bennett  
Date of Services: 5 years  
Dollar Amount for Services: \$ 105 K  
Overall Comments: \_\_\_\_\_  
\_\_\_\_\_