



**Santos Manuel
Student Union**

CAL STATE SAN BERNARDINO

**California State University, San Bernardino
Santos Manuel Student Union Board of Directors
Audit Committee**

March 24, 2026 – 4:00pm

Zoom: <https://csusb.zoom.us/j/88153481904>

AGENDA

1. Call to Order
2. Roll Call
3. Approval of Minutes
4. Open Forum
5. Adoption of Agenda
6. New Business
 - a. AC 05/26 Recommend Top Audit and Tax Services RFP Finalist (Action, Del Rossi)
7. Announcements
8. Adjournment

Audit RFP Quality Points Summary

Final score = Written Proposal (40 pts) + Presentation (40 pts) + Fees Proposal (20 pts)

Note: the uploaded files include written proposal results and fee proposal results. Presentation scores were not included, so the Presentation Scores sheet has been added as an input template. Enter presentation scores there and the final ranking on this page will update automatically.

Vendor	Written Avg	Written N	Present. Avg	Present. N	3-Year Fees	Fee Pts	Current Total	Final Total	Rank
LSL	27.3	12	25.5	12	\$590,690	13.1	40.4	65.9	3
RAMS	30.8	13	32.8	12	\$387,245	20.0	50.8	83.7	1
Baker Tilly	32.8	13	33.6	12	\$562,460	13.8	46.5	80.2	2
CLA	24.2	13	22.2	12	\$515,406	15.0	39.3	61.5	4

Outcome Snapshot

Current leader	RAMS
Current subtotal	50.8
Final leader	RAMS
Final total	83.7
Status	Complete
Retain Current Audit Firm Through Contract?	NO

1. Written proposal points use the average score submitted in the survey (0-40).
2. Presentation points are calculated from the average of entered presentation scores (0-40).
3. Fee points use: lowest 3-year fee total / vendor 3-year

Written Proposal Detail (Based on Collective Average)

Criterion	LSL	RAMS	Baker Tilly	CLA
A. Understanding & approach (0-10)	6.3	8.2	8.4	6.2
B. Team, continuity & capacity (0-9)	5.9	7.5	7.6	5.2
C. Schedule & execution confidence (0-7)	4.3	5.7	6.0	3.6

D. Tax coordination & compliance (0-6)	3.8	4.8	5.2	3.2
E. Communication & client experience (0-5)	3.4	4.3	4.3	2.5
F. Fee clarity & scope mgmt. (0-3)	1.9	2.4	2.2	1.5
Overall written proposal avg (0-40)	27.3	30.8	32.8	24.2

Fee Proposal Detail					
Vendor	FY 25-26	FY 26-27	FY 27-28	3-Year Total	Fee Points
LSL	\$187,370	\$196,860	\$206,460	\$590,690	13.1
RAMS	\$124,475	\$129,060	\$133,710	\$387,245	20.0
Baker Tilly	\$178,565	\$187,335	\$196,560	\$562,460	13.8
CLA	\$163,574	\$171,613	\$180,219	\$515,406	15.0

Written proposal averages ignore blanks; LSL has one fewer written response than the other firms.

Workbook prepared from the two uploaded source files.