



THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA

MATERIALS MANAGEMENT DEPARTMENT

101 OLD VENICE ROAD

OSPREY, FLORIDA 34229

TELEPHONE (941) 486-2183 • FAX (941) 486-2188

MEMORANDUM

TO: Mitsi Corcoran, Chief Financial Officer

FROM: Pat Black, CPPB, Director of Materials Management

TITLE: APPROVAL TO AWARD PROPOSAL #13-0217 FOR INDEPENDENT AUDITING SERVICES

Proposals to provide 'Independent Auditing Services' were received from nine vendors on January 8, 2013. The proposal of Cherry Bekaert, LLP, was the best proposal meeting the advertised specifications. These services include the external independent auditing of the district and the auditing of the schools' internal accounts. The Auditor General's Office will provide external auditing services every three years. It is projected that they will audit the district in the 2014-15 fiscal year. This proposal is for a three-year period with the option to renew for two years. The funds for these purchases are contained in the operating budget allocated to the Financial Services Department.

Requested by:
Mitsi Corcoran

"Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the protest bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes."

Posting Date 01-29-2013

Financial Impact: Not to exceed
\$705,900.00

Recommendation Motion: That the proposal of Cherry Bekaert, LLP, to provide 'Independent Auditing Services' in an amount not to exceed \$705,900 for a five year period, be approved as presented.

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RFP Tabulation for Independent Auditing Services – RFP #13-0217

Proposal Opening: January 8, 2013 at 2:00 p.m.

Proposer's Name	Address	Authorized Representative	Telephone #	Fax #	E-mail Address	Signed Addendums (1)
Carr, Riggs & Ingram, LLC	500 Grand Blvd, # 210 Miramar Beach, FL 32550	Bruce A. Nunnally	850-837-3141	850-654-4619	bnunnally@cricpa.com	1
Cherry Bekaert, LLP	401 E Jackson Street, Suite 3400 Tampa, FL 33602	John J. Gilberto	813-251-1010	813-251-9235	jgilberto@cbh.com	1
CliftonLarsonAllen LLP	6810 International Center Blvd Fort Myers, FL 33912	Martin A. Redovan, CPA, Partner	239-226-9900	239-226-9950	martin.redovan@cliftonlarsonallen.com	1
King & Walker, CPA's PL	709 W. Azeele Street Tampa, FL 33606	Robert Walker, CPA	813-892-4274	813-253-0951	bob@kingandwalker.com	0
Mauldin & Jenkins, LLC	1301 Sixth Avenue West Suite 600 Bradenton, FL 34205	Leanne T. Cross, CPA	941-747-4483	941-747-8396	lcross@mjcpa.com	1
Mayer Hoffman McCann P.C.	13577 Feather Sound Drive Suite 400 Clearwater, FL 33762	Laura Krueger Brock	877-887-1090	727-571-1933	lbrock@cbizkrmt.com	1
Moore Stephens Lovelace, P.A.	1201 S Orlando Avenue Suite 400 Winter Park, FL 32789	Daniel O'Keefe	800-683-5401	407-740-0012	dokeffe@mslcpa.com	1
Purvis, Gray and Company, LLP	5001 Lakewood Ranch Blvd N, Suite 101 Sarasota, FL 34240	Joseph J. Welch, CPA, Partner	941-907-0350	941-907-0309	jwelch@purvisgray.com	1
Shinn & Company LLC	1001 3rd Avenue West Suite 500 Bradenton, FL 34205	Neil Unruh, CPA, Shareholder	941-747-0500	941-746-0202	neil@shinnandcompany.com	1
Recorded by: Nikki Brock			Witnessed by: Carol A. Lichon			

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POINTS AWARDED FOR FEE BID		
DISTRICT AUDIT With the lowest fee for a qualifying bidder of:		With the lowest fee for a qualifying bidder for additional work:
Proposer		Points Awarded
Carr, Riggs & Ingram, LLC	\$485,000.00	17.54
Cherry Bekaert, LLP	\$469,000.00	18.22
CliftonLarsonAllen LLP	\$427,500.00	20.00
Mauldin & Jenkins, LLC	\$454,000.00	18.79
Mayer Hoffman McCann P.C.	\$475,000.00	18.00
Moore Stephens Lovelace, P.A.	\$550,000.00	15.55
Purvis, Gray and Company, LLP	\$582,800.00	14.67
Shinn & Company LLC	\$505,000.00	13.54
Shinn & Company LLC did not propose a fee for Fiscal Year ending June 30, 2015, the year we anticipate the Auditor General.		
King & Walker, CPAs PL submitted a proposal for 'Internal Accounts' audit only.		

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POINTS AWARDED FOR FEE BID		
INTERNAL ACCOUNTS AUDIT With the lowest fee for a qualifying bidder of:	\$157,750.00	With the lowest fee for a qualifying bidder for additional work:
Proposer	Proposed Fee	Points Awarded
Carr, Riggs & Ingram, LLC	\$260,000.00	12.13
Cherry Bekaert, LLP	\$236,900.00	13.32
CliftonLarsonAllen LLP	\$157,750.00	20.00
King & Walker, CPA's PL	\$210,000.00	15.02
Mauldin & Jenkins, LLC	\$179,000.00	17.63
Mayer Hoffman McCann P.C.	\$183,000.00	17.24
Moore Stephens Lovelace, P.A.	\$225,000.00	14.02
Purvis, Gray and Company, LLP	\$229,100.00	13.77
Shinn & Company LLC	\$225,000.00	14.02

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FINAL EVALUATION						
DISTRICT AUDIT						
Proposer	1	2	3	Average	Overall Fee	Total
Carr, Riggs & Ingram, LLC	35.00	50.00	53.00	46.00	17.54	63.54
Cherry Bekaert, LLP	80.00	78.00	78.00	78.67	18.22	96.89
CliftonLarsonAllen LLP	30.00	35.00	50.00	38.33	20.00	58.33
Mauldin & Jenkins, LLC	50.00	49.00	55.00	51.33	18.79	70.12
Mayer Hoffman McCann P.C.	60.00	65.00	60.00	61.67	18.00	79.67
Moore Stephens Lovelace, P.A.	65.00	76.00	73.00	71.33	15.55	86.88
Purvis, Gray and Company, LLP	50.00	50.00	67.00	55.67	14.67	70.34
Shinn & Company LLC	20.00	25.00	28.00	24.33	13.54	37.88

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FINAL EVALUATION							
INTERNAL ACCOUNTS AUDIT							
Proposer	1	2	3	4	Average	Overall Fee	Total
Carr, Riggs & Ingram, LLC	55.00	59.00	30.00	50.00	48.50	12.13	60.63
Cherry Bekaert, LLP	78.00	78.00	60.00	70.00	71.50	13.32	84.82
CliftonLarsonAllen LLP	30.00	35.00	25.00	35.00	31.25	20.00	51.25
King & Walker, CPA's PL	45.00	42.00	20.00	30.00	34.25	15.02	49.27
Mauldin & Jenkins, LLC	50.00	49.00	20.00	20.00	34.75	17.63	52.38
Mayer Hoffman McCann P.C.	60.00	70.00	55.00	55.00	60.00	17.24	77.24
Moore Stephens Lovelace, P.A.	55.00	67.00	20.00	35.00	44.25	14.02	58.27
Purvis, Gray and Company, LLP	40.00	45.00	35.00	55.00	43.75	13.77	57.52
Shinn & Company LLC	20.00	25.00	0.00	20.00	16.25	14.02	30.27