



**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: Members of the School Board  
Dr. Gary Norris, Superintendent  
Mr. Scott Lempe, Associate Superintendent**

**FROM: Pat Black, CPPB, Director of Materials Management**

**TITLE: APPROVAL TO AWARD PROPOSAL #7150 FOR INDEPENDENT  
AUDITING SERVICES**

Proposals to provide 'Independent Auditing Services' were received from six vendors on April 19, 2007. The proposal of Cherry, Bekaert and Holland, 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 they will audit the district in the 2008-09 fiscal year. This proposal is for a three period with the option to renew for two years. The actual cost for the 2008-09 fiscal year will be lower since the auditing firm will be serving in an advisory capacity to the state. The funds for this purchase are contained in the operating budget allocated to the Financial Services Department.

**Requested by:**  
Carrie Hannabass

**Evaluated by:**  
Carrie Hannabass  
Laura Peaslee  
Nancy Wilson

"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: 5-29-07

**Fiscal Impact:**

Not to exceed  
\$712,000.00

**Funding:**

Operating

**Recommended Motion:** That the proposal of Cherry, Bekaert and Holland, LLP, to provide 'Independent Auditing Services' in an amount not to exceed \$712,000.00 for a five year period, be approved for award and purchase.

(over)

THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA

RFP Tabulation for Independent Auditing Services - RFP #7150

Proposal Opening: April 19, 2007 - 2:00 p.m.

Proposer's Name	Address	Authorized Representative	Telephone #	Fax #	E-mail Address	Signed Addendums (2)
<b>Cherry, Bekaert &amp; Holland, L.L.P.</b>	<b>800 North Magnolia Avenue Suite #1300 Orlando, FL 32803</b>	<b>C. A. Morris</b>	<b>407-423-7911</b>	<b>407-841-4887</b>	<b><a href="mailto:tmorris@cbh.com">tmorris@cbh.com</a></b>	<b>2</b>
CPA Associates	1301 Sixth Avenue West Suite #600 Bradenton, FL 34205-7440	Tommye E. Barie	941-747-4483	941-747-8396	<a href="mailto:tbarie@cpa-associates.com">tbarie@cpa-associates.com</a>	2
Cuthill & Eddy LLC	1031 West Morse Blvd. Suite #200 Winter Park, FL 32789	Jennifer L. Christensen	407-644-7455	407-628-5277	<a href="mailto:jchristensen@cuthilleddy.com">jchristensen@cuthilleddy.com</a>	2
King & Walker, CPA's, PL	P.O. Box 1377 Lutz, FL 33548	Robert Walker, CPA	813-610-0659	813-832-5240	<a href="mailto:bobwalkercpa@aol.com">bobwalkercpa@aol.com</a>	2
Purvis, Gray & Company LLP	2201 Cantu Court, #100 Sarasota, FL 34232	Joseph J. Welch	941-379-2800	941-379-2899	<a href="mailto:jwelch@purvisgray.com">jwelch@purvisgray.com</a>	2
Rachlin Cohen & Holtz LLP	450 East Las Olas Blvd. Suite #950 Ft. Lauderdale, FL 33301	Susan L. Friend	954-525-1040	954-525-2004	<a href="mailto:sfriend@rachlin.com">sfriend@rachlin.com</a>	2
Recorded by: Michelle F. Miller			Witnessed by: Carol A. Lichon			

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<b>AWARD-EXTERNAL</b>						
	Points Awarded					
Proposer	1	2	3	Average	Overall Fee	Total
<b>Cherry, Bekaert &amp; Holland, L.L.P.</b>	<b>67.00</b>	<b>69.00</b>	<b>55.00</b>	<b>63.67</b>	<b>18.53</b>	<b>82.20</b>
CPA Associates	55.00	61.00	56.00	57.33	17.50	74.83
Purvis, Gray & Company LLP	48.00	56.00	40.00	48.00	20.00	68.00
Rachlin Cohen & Holtz LLP	40.00	40.00	25.00	35.00	8.72	43.72
<b>AWARD-INTERNAL</b>						
	Points Awarded					
Proposer	1	2	3	Average	Overall Fee	Total
<b>Cherry, Bekaert &amp; Holland, L.L.P.</b>	<b>67.00</b>	<b>69.00</b>	<b>50.00</b>	<b>62.00</b>	<b>14.57</b>	<b>76.57</b>
Cuthill & Eddy LLC	64.00	60.00	35.00	53.00	18.30	71.30
King & Walker, CPA's, PL	60.00	55.00	25.00	46.67	20.00	66.67
Purvis, Gray & Company LLP	48.00	56.00	70.00	58.00	13.56	71.56

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RFP Tabulation for Independent Auditing Services - RFP #7150

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<b>POINTS AWARDED FOR FEE BID</b>		
EXTERNAL ACCOUNTS With the lowest fee for a qualifying bidder of:	\$455,000.00	With the lowest fee for a qualifying bidder for additional work:
Proposer	Proposed Fee	Points Awarded
<b>Cherry, Bekaert &amp; Holland, L.L.P.</b>	<b>\$491,000.00</b>	<b>18.53</b>
CPA Associates	\$520,000.00	17.50
Purvis, Gray & Company LLP	\$455,000.00	20.00
Rachlin Cohen & Holtz LLP	\$1,043,900.00	8.72

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RFP Tabulation for Independent Auditing Services - RFP #7150

Proposal Opening: April 19, 2007 - 2:00 p.m.

<b>POINTS AWARDED FOR FEE BID</b>		
INTERNAL ACCOUNTS With the lowest fee for a qualifying bidder of:	\$161,000.00	With the lowest fee for a qualifying bidder for additional work:
Proposer	Proposed Fee	Points Awarded
<b>Cherry, Bekaert &amp; Holland, L.L.P.</b>	<b>\$221,000.00</b>	<b>14.57</b>
Cuthill & Eddy LLC	\$176,000.00	18.30
King & Walker, CPA's, PL	\$161,000.00	20.00
Purvis, Gray & Company LLP	\$237,500.00	13.56