



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services

Nicole Westmoreland, MBA, Purchasing Agent

813/794-2221 Fax: 813/794-2111

727/774-2221 TDD: 813/794-2484

352/524-2221 email: nwestmor@pasco.k12.fl.us

May 6, 2014

MEMORANDUM

TO: Honorable School Board Members

FROM: Nicole Westmoreland, MBA, Purchasing Agent *NW*

RE: Fourth Year Renewal of a Five-Year Contract
RFP #12-019-DM, Independent Auditing Services
Moore Stephens Lovelace, P.A.

On August 16, 2011, official action (attached) was taken to award the above-referenced RFP to Moore Stephens Lovelace, P.A. This RFP is a five-year contract, renewable annually based upon mutual consent of all parties. The third year of the agreement will expire on June 30, 2014.

Considering services have been satisfactory, William Blend of Moore Stephens Lovelace, P.A. was contacted to verify his willingness to enter into the fourth year of this contract under the existing terms and conditions. William Blend has agreed in writing (attached) to do so.

At this time, it is my recommendation to enter into the fourth year of the contract, covering the period of July 1, 2014 through June 30, 2015.

Should you have any questions regarding this matter, or if I can be of further assistance, please feel free to contact me at your earliest convenience.

NW/plh

Attachments

Date/Time: April 30, 2014 09:19:00

(813) 794-2000 • (352) 524-2000 • (727) 774-2000 • www.pasco.k12.fl.us



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services

Nicole Westmoreland, MBA, Purchasing Agent

813/ 794-2221 Fax: 813/ 794-2111

727/ 774-2221 TDD: 813/ 794-2484

352/ 524-2221 e-mail: nwestmor@pasco.k12.fl.us

RFP RENEWAL REQUEST

RFP #12-019-DM

RFP TITLE: Independent Auditing Services

X Yes, I agree to renew RFP #12-019-DM under the same terms and conditions as the existing RFP. The fourth year period shall be from July 1, 2014 through June 30, 2015. If you choose to renew, please also include a current certificate of liability insurance naming the District School Board of Pasco County as a certificate holder.

_____ No, I do not agree to renew RFP #12-019-DM

COMPANY NAME: Moore Stephens Lovelace, P.A.

SIGNATURE: *William Blend*

TYPED NAME AND TITLE: William Blend, Shareholder

TELEPHONE (WITH AREA CODE): 407.740.5400

FAX NUMBER (WITH AREA CODE): 407.740.0012

E-MAIL: wblend@msslcpa.com

DATE: April 11, 2014

The prospective vendor certifies, by submission and signature of this RFP renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).

PLEASE EMAIL BACK TO: phall@pasco.k12.fl.us
DISTRICT SCHOOL BOARD OF PASCO COUNTY
ATTENTION: Patty Hall, Interim Buyer
PURCHASING DEPARTMENT
20430 GATOR LANE
LAND O' LAKES, FL 34638
(813) 794-2258 (PHONE)
(813) 794-2111 (FAX)

District School Board of Pasco County

Bid Recommendation

RFP Title	Independent Auditing Services		Number of Vendors Notified	389
RFP Number	12-019-DM		Number of Proposals Distributed	59
Date Solicited	May 18, 2011		Number of Vendors Proposing	8
Date Opened	June 14, 2011		Number of Formal "No Bid" Responses	0
Date Board Presentation	August 16, 2011		Funding Source	Financing & Debt Service Funds
Total Savings	N/A		Grand Total of Proposal	\$358,000

Recommendation: This RFP was solicited for the purpose of selecting the highest-scoring firm to serve as the District's Independent Auditor. The firm selected will provide independent auditing services to the District for a period of five (5) years, beginning with an audit of the District's financial statements for fiscal year ending June 30, 2011; ending after the completion and submission of the audit report for the fiscal year ending June 30, 2015. These include, but are not limited to: Financial Audit, Review of Internal Controls, Electronic Data Processing Operations, Management Letter, Financial Reports, Single Audits, Foundation, and Reports.

Recommend acceptance of RFP per the attached tabulation from Moore Stephens Lovelace, P.A. as the highest-scoring, responsive and responsible proposer.

Term of Contract: This is a five (5)-year contract, renewable annually at the mutual agreement of the parties for fiscal year ending June 30, 2011 and ending after the completion and submission of the audit report for the fiscal year ending June 30, 2015.

Notations and Exceptions: The Evaluation Committee members noted below, independently scored the eight (8) proposals received. Four (4) firms were interviewed and independently scored by the Evaluation Committee members noted below. Carr, Riggs & Ingram, LLC. and Mauldin & Jenkins, LLC. was interviewed on July 18, 2011. Mayer Hoffman McCann P.C. and Moore Stephens Lovelace P.A. were interviewed on July 19, 2011. Scores from the RFP responses and the interviews were added to produce the final, highest-scoring proposer.

Offers from proposers listed herein are the only offers received per the specified opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late.

District School Board
of Pasco County

MAY 21 2013

Board Approved

District School Board
of Pasco County

MAY 15 2012

Board Approved

District School Board
of Pasco County

AUG 16 2011

Board Approved

Written Proposals (Phase I) Evaluated By:

John Simon, Director of Finance Services
Tammy Taylor, Finance Services Manager
Lila Robbins, Internal Audit Manager
Sam Draper, Capital Project Coordinator
Mary Tillman, Director-EBARM


Interviews (Phase II) Evaluated By:

John Simon, Director of Information Services
Judith Zollo, Acting Director of Finance Services
Lila Robbins, Internal Audit Manager
Sam Draper, Capital Project Coordinator
Mary Tillman, Director-EBARM

Proposal Prepared By:

Deborah Mateo, Buyer Assistant

Reviewed and Authorized By:

Kendra Goodman, CPPO, CPPB, Purchasing Agent 

District School Board
of Pasco County

MAY 21 2013

Board Approved

District School Board
of Pasco County

MAY 15 2012

Board Approved

District School Board
of Pasco County

AUG 16 2011

Board Approved

DISTRICT SCHOOL BOARD OF PASCO COUNTY

Tabulation

Date of Opening : June 14, 2011								
RFP Title: Independent Auditing Services	Carr, Riggs & Ingram, LLC	Cherry, Bekaert & Holland, LLP	King & Walker CPA, PL	KPMG, LLP	Mauldin & Jenkins LLC	Mayer Hoffman McCann P.C.	Moore Stephens Lovelace P.A.	Purvis, Grya & Company, LLP
RFP 12-019-DM	2111 Drew Street	800 N. Magnolia Avenue, Suite 1300	840 W. Lutz Lake Fern Road	100 North Tampa Street, Suite 1700	1301-6th Avenue West, Suite 600	13577 Feather Sound Drive, Suite 400	1201 S. Orlando Avenue, Suite 400	5001 Lakewood Ranch Blvd. N., Suite 101
** Board August 16, 2011**	Clearwater, FL 33765	Orlando, FL 32810	Lutz, FL 33548	Tampa, FL 33602	Bradenton, FL 34205	Clearwater, FL 33762	Winter Park, FL 32789	Sarasota, FL 34240
<u>Scores Phase I</u>								
Exhibit 1: Experience & Qualification of Firm (max. 40 pts.)	35.80	34.00	30.30	23.85	32.70	34.25	31.80	29.80
Exhibit 2: Experience & Qualification of Staff (max. 30 pts.)	27.40	21.10	17.20	19.80	20.10	19.60	28.00	23.00
Exhibit 3: References (max. 10 pts.)	9.73	9.33	10.00	9.87	10.00	9.40	10.00	9.60
Exhibit 4: Pricing (max. 20 pts.)	17.83	15.38	18.87	13.13	20.00	17.86	16.76	16.19
SUB-TOTAL (sub-total max. pts. 100)	90.76	79.81	76.37	66.65	82.80	81.11	86.56	78.59
<u>Scores Phase II</u>								
Interview Scores (max. 75 pts.)	44.00	n/a	n/a	n/a	53.80	42.20	56.00	n/a
GRAND TOTAL	134.76	79.81	76.37	66.65	136.60	123.31	142.56	78.59

Board Approved

MAY 15 2012

District School Board of Pasco County

Board Approved

AUG 16 2011

District School Board of Pasco County

District School Board of Pasco County

MAY 21 2013

Board Approved