



MEMORANDUM

Date: September 12, 2024

To: Honorable Mayor and Commissioners

Via: Todd Stoughton
Interim City Manager

From: Christina Bervaldi
Director of Finance

Subject: **Assignment of Independent Auditing Services Contract Awarded via RFP #23-003**

Introduction

Staff respectfully requests the City Commission approve the assignment of the contract for Independent Auditing Services from Keefe McCullough & Co., LLP to Citrin Cooperman & Company, LLP with the same terms and conditions and the City Manager to execute the necessary documents upon consent of the City Attorney.

Background

The City entered in a Professional Services Agreement dated January 24, 2024 with Keefe McCullough & Co., LLP, a licensed independent CPA firm. The contract was awarded in response to RFP #23-003 for Independent Auditing Services by Resolution 23-349, which followed Florida Statute 218.391 and included the new auditor selection process that was amended in 2019. The term of the contract was to perform audits for Fiscal Years (FY) ending:

- September 30, 2023
- September 30, 2024
- September 30, 2025
- September 30, 2026
- September 30, 2027

The agreement provides the City with the option to renew the contract for one (1) additional two (2) year period ending with the audit of FY 2029, which will take place in 2030.

Section 8.2 of the contract allows for the assignment for the interest and services associated with the contract upon written consent of the contractor.

Keefe McCullough & Co., LLP, a licensed independent CPA firm, was acquired by Citrin Cooperman, a licensed independent CPA firm, on February 1, 2024, through an Attest Asset Purchase Agreement and Keefe McCullough & Co., LLP has requested to assign their existing contract to Citrin Cooperman.

Per the guidelines in F.S. 218.391, assigning of the contract to a new firm is allowable and does not require the implementation of the selection process under the Statute and a new selection evaluation committee or a new solicitation process.

Procurement

The assignment of the contract has no financial implications.

Recommendation

Staff respectfully requests the City Commission to approve the assignment of the contract for Independent Auditing Services from Keefe McCullough & Co., LLP to Citrin Cooperman & Company, LLP with the same terms and conditions and the City Manager to execute the necessary documents upon consent of the City Attorney.

Exhibits:

Exhibit A – Resolution 23-349

Exhibit B – Keefe McCullough & Co., LLP Contract for Independent Auditing Services

Exhibit C – Request for Assignment

Exhibit D – Attest Asset Purchase Agreement