

CAREERSOURCE SUNCOAST
Audit and Tax Services Proposals
RFP #2025-01 Review Committee
Virtual TEAMS Meeting
Wednesday, March 4, 2026
10:30 a.m.

Call to Order

Jim Bos, Treasurer/Committee Chair, called the meeting to order at 10:31 a.m.

Attendees: Jim Bos, Eric Troyer, and Lorri Kidder and CareerSource Suncoast staff Robin Dawson, Kathy Bouchard, and Christina Witt

Review of Rules & Process - Robin Dawson reviewed the rules and the process for the committee.

RFP #25-01 Audit & Tax Services Responsiveness Review – A total of three firms submitted proposals. All three proposals were found responsive based on CareerSource Suncoast staff review. A summary of each firm’s reference checks was shared for committee review, along with their proposals. It was noted that Non-Conflict of Interest Statements were signed and on file prior to the rating of the proposals.

The committee reviewed all three proposals. Proposals Reviewed (Alpha Listing):

- a. James Moore & Company
- b. MKA Certified Public Accountants
- c. Warren Averett

Completion/Review of Evaluation Forms

Committee members independently completed a rating sheet on each proposal. The results of the member ratings were compiled by CareerSource Suncoast staff, with rankings assigned. The summary of each firm’s ranking and points (alpha order):

<u>Firm</u>	<u>Ranking</u>	<u>Points</u>
James Moore & Co, CPAs	1	288
MKA Certified Public Accountants	2	285
Warren Averett, CPAs	3	225

Recommendation to Board for Audit & Tax Services

Based on the ranking results, James Moore & Company ranked the highest. Jim Bos requested a motion for the recommendation to be presented to the Executive Committee and Board of Directors on March 12, 2026, for CSS to engage in contract negotiations with James Moore & Company for audit and tax services for PY2025-2026 and up to four additional one-year periods beyond the completion of the PY2025-2026 audit.

Motion: Eric Troyer

Second: Lorri Kidder

Motion passed unanimously