

AGENDA ITEM REPORT

DATE: November 18, 2025
DEPARTMENT: Procurement
REQUESTER: Mary Tucker
TITLE: Award Contract for Financial Auditor for Lee BoCC, Clerk of Courts, Port Authority

I. MOTION REQUESTED

- A. Award Request for Proposal No. RFP250054KLB – Financial Auditor – Lee County BOCC, Clerk, & Port Authority to CliftonLarsonAllen, LLP for the financial auditing services for the County and its associated Constitutional Offices of the Clerk of the Circuit Court and Port Authority, on an as needed basis, for an initial term of three years, in the amount of \$1,268,500.00.
- B. Authorize the Chair to execute the contract documents on behalf of the Board of County Commissioners.
- C. Grant the County Manager or designee the authority to renew the contract, for up to two additional one-year periods, and to execute all associated documents, as approved in the department's annual adopted budgets, if doing so is in the best interest of Lee County.

II. ITEM SUMMARY

Awards a contract for financial auditor services for the Lee Board of County Commissioners (BoCC), Clerk of Courts and Port Authority to CliftonLarsonAllen, LLP. The total contract amount of \$1,268,500.00 is broken down to:

- 1. \$415,000.00 for year one,
- 2. \$422,500.00 for year two, and
- 3. \$431,000.00 for year three.

The annual contract is for an initial term of three years and can be renewed for up to two additional one-year periods upon mutual written agreement of both parties. Expenditures in Audit Year 2024-2025 were \$521,207.50. The contract represents a negotiated cost savings of \$54,500.00 from the initial contract price.

III. BACKGROUND AND IMPLICATIONS OF ACTION

Procurement Management solicited for proposals for the project known as Request for Proposal No. RFP250054KLB – Financial Auditor – Lee County BOCC, Clerk, & Port Authority. On the proposal deadline of August 13, 2025, Procurement Management received six submittals.

Evaluation 1 meeting was held on September 9, 2025, where the evaluation committee discussed the proposals received, focusing on the qualification of each proposer's ability to complete the job requirements. After discussions, each committee member independently scored the proposers based on the given criteria. Once all members had completed scoring, the scores were tallied by Procurement Management, and the proposers were ranked based on overall score. The committee determined that a second evaluation meeting was not required and motioned to recommend the award of a contract to CliftonLarsonAllen, LLP. Staff recommends awarding the contract to CliftonLarsonAllen, LLP in the amount of \$1,268,500.00 for the initial three-year contract term.

IV. FINANCIAL INFORMATION

Current Year Dollar Amount:	\$1,268,500
Included in the Current Budget?:	Yes
Fund:	General
Comments:	

Is this a revenue or expense item? Expense
Is this Discretionary or Mandatory? Discretionary
Will this item impact future budgets? No
Program: Non-Department
Project: Financial Audit

Account Strings: GC5190300100

Fund Type? General

V. RECOMMENDATION

Approve

ATTACHMENTS:

Proposed Contract - RFP250054KLB, Price Comparison - RFP250054KLB

REVIEWERS:

Samantha Westen, County Manager

Mary Tucker, Procurement

Anne Henkel, Budget Services

Robert Holborn, County Attorney

Peter Winton, County Manager

Created/Initiated - 11/5/2025

Approved - 11/6/2025

Approved - 11/6/2025

Approved - 11/6/2025

Final Approval - 11/6/2025