



TOWN OF BELLEAIR SHORES
Audit Committee Meeting – Following Budget Workshop Meeting
Tuesday, July 21, 2026
City of Belleair Bluffs Mayors Conference Room
2747 Sunset Blvd, Belleair Bluffs, FL 33770
Agenda

Discussion – Audit Committee Process

Posted at belleairshore.com, City of Belleair Bluffs
E-mailed: Mayor, Commissioners, Town Attorney & Press

NOTE: All e-mail to and from the Town of Belleair Shore is subject to Florida's Public Records Laws.

Town Clerk
Mary Palmer, MMC

“Any person who decides to appeal any decision of the Town Council with respect to any matter considered at any such meeting will need a record of the proceedings, and for such purpose, may need to ensure that a verbatim record of the proceedings is made, which record includes that testimony and evidence upon which the appeal is to be based.

**TOWN OF BELLEAIR SHORE, FLORIDA
REQUEST FOR PROPOSALS**

**Municipal Auditing Services for Fiscal Year Ending September 30, 2026
With Two Optional Annual Renewals
Pinellas County, Florida**

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Proposals must be received no later than **August 10, 2026, at 12:00 p.m.**, by sending an electronic copy via e-mail to clerk@belleairshore.com. All proposals timely received will be published with the agenda and presented to the Town of Belleair Shore Auditor Selection Committee on August 18, 2026 at 5:30 p.m.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the Town, including the latest Peer Review report.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the Town has reason to believe that collusion may exist among the Proposers, that the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or that the Proposer has failed to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit one (1) electronic copy of the Proposal Documents, and other requested attachments as indicated herein, with the title "Auditing Services – Town of Belleair Shore, Florida" on the subject line of the email.

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (the "Proposal Documents").

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The Town reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the Town.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the Town, the Proposer shall enter into and execute a Contract (engagement letter) with the Town.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of the Town's limited liability contained in section 768.28, Florida Statutes, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

A. List position or title of all personnel to perform work on the Town audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.

B. Describe proposed staffing levels, including resumes with applicable certifications.

C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.

D. Provide the lump sum cost of the provision of the services under the proposal.

SECTION 13. PROTESTS. Any protest regarding the Proposal Documents must be filed in writing, with the Town Clerk, within seventy-two (72) hours after the receipt of the proposed project plans and specifications or other contract documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid plans, specifications or contract documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

AUDITOR SELECTION EVALUATION CRITERIA

1. Ability of Personnel. (20 Points)

(E.g., geographic locations of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. (20 Points)

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other municipalities in other contracts; character, integrity, reputation, of respondent, etc.)

3. Understanding of Scope of Work. (20 Points)

Extent to which the proposal demonstrates an understanding of the Town's needs for the services requested.

4. Ability to Furnish the Required Services. (20 Points)

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required (E.g. the existence of any natural disaster plan for business operations).

5. Price. (15 Points)

A full fifteen (15) points will be awarded to the Proposer submitting the lowest bid. AN AVERAGE OF ALL THREE YEARS' PRICING IS TO BE CONSIDERED WHEN AWARDING POINTS FOR PRICING - THE INITIAL TERM AND THE FIRST AND SECOND ANNUAL RENEWALS. All other proposers will receive a percentage of this amount based upon a formula which divides the low bid by the proposer's bid and is then multiplied by the number of points possible in this part of the Price evaluation.

Example:

Proposer "A" turns in a bid of \$8,000 and is deemed to be low bid and will receive the full 15 points. Proposer "B" turns in a bid of \$10,000. Bid "A" is divided by Bid "B" then multiplied by the number of points possible (15). $(8,000/10,000) \times 15 = 12$, therefore, Proposer "B" will receive 12 of 15 possible points. Proposer "C" turns in a bid of \$12,000. Bid "A" is divided by Bid "C" then multiplied by the number of points possible (15). $(8,000/12,000) \times 15 = 10$, therefore, Proposer "C" will receive 10 of 15 possible points.

6. Price Reasonableness. (5 Points)

Total (100 Points)