



EXECUTIVE SUMMARY

Meeting Date:	January 23, 2025
Agenda Item:	Financial Audit Firm Change
Item Type:	Consent Agenda
Administrator:	Brad Earl
Objective:	Approve financial auditor on the consent agenda

Background: Pauly, Rogers and Co., P.C., located in Tigard, Oregon, has been providing auditing services for the Medford School District for many years. The district conducted a Request for Proposal process in January of 2013 and selected Pauly, Rogers to continue to provide auditing services for the district. Kenny Allen, CPA, CFE has been the Partner In Charge for the services provided for the district dating back to at least 2010.

Kenny Allen and our existing audit team has split from Pauly, Rogers & Co to the newly formed Clear Trail CPAs, LLC. Kenny Allen is highly regarded as one of the leading experts in K12 financial reporting in Oregon. The audit team and compliance managers will remain unchanged, ensuring a seamless transition of our services to Clear Trail CPAs.

There are a number of designations required or recommended as part of the organizational plan. In election years, that meeting must occur no later than the last day of July. (ORS 332.040 and 255.335(5)). Pauly Rogers was designated by the board for use as its audit firm at the board meeting on June 20, 2024. Because it is a continuation of an existing professional relationship, our attorney has advised us that the Board may approve the switch to (or designate) Clear Trail CPAs as the District's financial auditor on its consent agenda without going through a new RFP process.

Kenny Allen, with over 26 years of dedicated governmental auditing experience, and Tara Kamp, with 19 years of expertise, will lead a dynamic team of 17 professionals, including five licensed municipal CPAs right here in Oregon.

Additional Materials: None

Recommendation: Approve the District's engagement of Clear Trails CPAs with the consent agenda.

Suggested Motion: A formal motion is not required if approved with the consent agenda.