



MARTHA'S VINEYARD REGIONAL HIGH SCHOOL

Audit Sub-Committee Meeting

Friday, July 10, 2026

8AM

Zoom

[AGENDA Items Link](#)

Present: Amy Houghton, Rizwan Malik, Elliott Bennett, Marsha Shufrin, Kathryn Shertzer
Staff: Principal - Bryan Lombardi, Finance Director - Suzanne Cioffi
Supt's Office: Superintendent - Jamie Curley
Recorder: Rebecca Claussen

Please note: All business will consist of a discussion and possible vote to take action.

(Recorder's Note: Discussions are summarized and grouped for clarity and brevity)

I. Call to Order

Amy Houghton called this meeting to order at 8:02 am.

II. Review Audit Proposal from CBIZ Advisors, LLC – Discussion and Possible Vote

Amy presented the proposal from CBIZ Advisors, LLC with regards to the audit of the Transportation Department. This has not been presented publicly or shared with the committee just yet as they have not been vetted, nor officially selected. This is, however, the only proposal received and needs review. Amy will share with everyone officially if it is voted on to move forward. See folder for full proposal with highlights from CBIZ, LLC. As a national company, with a lot of work done in New England, CBIZ has extensive experience with government audits, is licensed in Massachusetts and has worked with Massachusetts School Districts. Additionally, CBIZ had not done any work that would be in conflict with Martha's Vineyard. The projected timeline is about 8 weeks with a cost of \$85,000, and confidentiality and clear communication and updates with Jamie Curley, Bryan Lombardi and the School Committee expected, in addition to the new Assistant Superintendent, Ashley Lopes, who will have the work of the transportation department as her number one priority when she begins on August 1, 2026. The cost is higher than originally anticipated, so Suzanne will look to see where those funds can be moved from. Kathryn did express concern with regards to potential discovery of any illegal acts, CBIZ will work with legal counsel for the appropriate reporting. *Rizwan Malik made a motion to develop a letter of engagement with CBIZ, LLC within the parameters discussed, seconded by Elliott Bennett. Roll Call: Bennett - Aye, Malik - Aye, Shertzer - Aye, Shufrin - Aye, Houghton - Aye. Motion Passes: 5-0-0*

III. Review of Contract

Discussed as part of the above item, II.

Vote Required

IV. Adjournment

Kathryn Shertzer made a motion to adjourn, seconded by Rizwan Malik. Roll Call: Bennett - Aye, Malik - Aye, Shertzer - Aye, Shufrin - Aye, Houghton - Aye.

Motion Passes: 5-0-0

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Appendix A: Documents on File

- 1. Scope of services Purchase Description_MVRHS.2026**
- 2. MVRHS Audit Subcommittee Agenda 071026**
- 3. Letter to Request Independent Auditing Services_MVRHS.2026**
- 4. 7.10 MVRHS Audit Sub-Committee Meeting**

Appendix B: Zoom AI Next Steps

- 1. Amy: Talk to Jonathan about having the billing for Sean Sweeney's firm separated out as their own.**
- 2. Amy: Send the CBiz proposal document to all committee members for review.**
- 3. Amy: Work with Jonathan and Sean Sweeney to identify and encumber legal fees associated with the audit process.**
- 4. Jamie: Speak with the transportation director from Barnstable (contacted through Meg Mayo-Brown) for feedback on CBiz and any other recommendations.**
- 5. Suzanne: Provide a document or information on the structure of the transportation department (CDL drivers, 7D drivers, monitors, off-island drivers).**
- 6. Suzanne: Provide copies of the transportation handbook to the committee.**
- 7. Suzanne: Prepare a budget transfer request for the next school committee meeting to cover the audit and legal fees.**
- 8. Jamie and Bryan: Determine who will be the primary point of contact for the audit.**
- 9. Jamie, Bryan, and Suzanne: Identify and compile a list of all employees involved in payroll processing, scheduling, and transportation, including their roles and approval processes.**
- 10. Jamie and Bryan: Reach out to references or contacts at districts where CBiz has worked (e.g., Acton-Boxborough, Plymouth) to do due diligence.**
- 11. Amy and Jamie: Work with Jonathan to draft a letter of engagement for CBiz, to be reviewed by the full committee.**
- 12. Committee Members: Review the CBiz proposal document over the weekend and send any concerns or questions to Jamie and Amy.**