



### ADDENDUM NO. 3

**TITLE: CITY OF BELLE GLADE FORENSIC  
AUDIT SERVICES**

**RFP NO: 03-2023**

**DATE: March 9<sup>th</sup>, 2023**

**RFP CLOSING DATE: 4/10/23 @ 3:00PM  
NUMBER OF PAGES: 5**

This Addendum to the specifications and contract documents is issued to provide additional information and clarification to the original Request for Proposals documents and is hereby declared a part of the original specifications and contract documents. In case of conflict, this Addendum shall govern.


Proposers shall acknowledge receipt of this Addendum in the appropriate place in the bid form.

**Description:**

1. ADDENDUM COVER PAGE
2. PRE-PROPOSAL MEETING MINUTES
3. SIGN IN SHEET

**THE BALANCE OF THIS PAGE IS INTENTIONALLY LEFT BLANK**

**CITY OF BELLE GLADE**

  
**Neil Appel, C.P.M.  
Purchasing Manager**

**PROPOSER**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Printed, Title**

\_\_\_\_\_  
**COMPANY**



## Pre-Proposal Conference Meeting Minutes

RFP # 03-2023

Name: City Of Belle Glade Forensic Audit Services

Date 3/8/23

Time: 10:00AM

## Attendees:

## Consultant Firms:

See attached attendance sheet		
John Heller	JH	Director, Marcum LLP

## City :

Diana Hughes	DH	Acting City Manager
Arrie Patrick	AP	Assistant Director of Finance
Neil Appel	NA	Purchasing Manager

The meeting commenced at 10:10AM.

	1.	<u>Introductions</u>	
NA, DH, AP,		1.1	City Staff and consultants introduced themselves.
		1.2	All attendees were cautioned that undocumented oral statements made during the meeting shall not be binding. Only those oral statements recorded in the meeting minutes shall be considered a part of the meeting and shall be binding in the context of their meaning.
NA	2	<u>RFP Announced Closing Date and Time:</u>	
		2.1	Date: 4/10/2023@ 3:00PM
		2.2	Time: 3:00p.m.
		Proposers were informed that they must submit one (1) original and fifteen (15) copies and one	
		2.3	thumb drive of their RFP.
	3.	<u>Scope of Work Review</u>	
NA,DH		3.1	Reviewed the General Scope of Work with all attendees
	3.	<u>Instructions to Proposers</u>	
NA		3.1	<u>Meeting</u>
NA		3.1.1	This is a non-mandatory pre-RFP conference. Non-attendees may also submit a proposal.
		3.3	<u>Communications</u>
NA		3.3.1	The point of contact is Neil Appel for the RFP process. All communications are to be written and emailed to the City, attention Neil Appel, Purchasing Manager. He will distribute to appropriate staff and upload all addendums to the City website.
NA		3.3.2	Addendums: All addenda shall be issued through the City website. Questions received by the City less than ten (10) calendar days prior to the RFP opening may not be answered. The City shall endeavor not to issue addenda within five (5) calendar days of the RFP opening
		3.4	<u>RFP/Contract Security-RESERVED</u>
		3.4.1	
		3.4.2	
		3.4.3	





		3.5	Safety-RESERVED
		3.5.1	
		3.5.2	
		3.5.3	
NA		3.6	RFP Rejection; The following shall result in automatic RFP rejection:
NA		3.6.1	Not signing your RFP.
NA		3.6.2	Not submitting audited or certified financials no more than two years old in a separate envelope. The financials will not be treated as a public record, but will be kept confidential. A compilation is not acceptable and will cause your response to be rejected as non-responsive.
NA		3.6.3	Audit engagement staff not being certified in Financial Forensics (CFF).
NA		3.6.4	Not submitting proof of three (3) successful projects of similar scope and size. Per the RFP documents.
NA			
		3.7	RESERVED
		3.7.1.	
NA		3.8	Execution of Contract
NA		3.8.1	A Notice of Intent to Award will be sent to the successful Proposer with the contracts to execute.
NA		3.8.2	The successful Proposer must execute and return the Notice of Intent to Award, to the Purchasing Department within 10 days of receipt from the City.
NA		3.8.3	The City reserves the right to reduce or eliminate line items prior to and after the award.
NA		3.9	Work Hours
		3.9.1	The work hours are 8:00AM to 5:00PM unless otherwise arranged.
4.			RFP Submittal Forms
NA		4.1	Forms
NA		4.1.1	It was noted that all Proposers were required to submit one (1) original and three (3) copies of the RFP submittal package.
NA		4.1.2	Submittal items were noted in the RFP Form and Qualifications Statement: Attachment A Non-Collusion affidavit Attachment B Public Entity Crime Statement Attachment C Drug Free Workplace Form Attachment D Truth-In-Negotiation Certificate and Affidavit Attachment E Conflict of Interest Form Attachment F Scrutinized Companies Certification Form Attachment G Proposer Certification and Signature Page (Mandatory rejection if not included and executed).



		4.1.3	All Proposers must submit using the City forms.
NA		4.2	Insurance
		4.2.1	Consultant staff must carry auto insurance.
NA		4.3.	Invoicing
NA,DH		4.3.1	Reviewed Invoicing procedure with emphasis on the following:
NA		4.3.2	Progress payments shall be made on a monthly basis.
NA		4.3.3	A Schedule of Values and updated project schedule must be included with every payment request detailing:
NA		4.3.4	A preliminary payment request shall be submitted to the City for review prior to the actual payment request being submitted. This will speed up the payment process.
		4.3.5	Contractor shall submit one (1) original plus (3) copies of their pay applications.

### QUESTIONS

1. What areas does the City want the audit to review?
  - a. Ans: Currently staff was not given a specific area to concentrate the audit.
2. What is the accounting software system in use?
  - a. The City uses Edmunds Logic. In the past (2015) the City used Phoenix. Optimum is used for the payroll system. The original mainframe McDonnell Douglas system was used in the past.
3. Does the City have a financial Control manual?
  - a. Yes, and it is updated yearly.
4. Does the City have any known fraud issues?
  - a. Yes, there is a current investigation that we cannot discuss at this time.

The meeting adjourned to Customer Service, Finance, Accounts Payable and Purchasing where a site inspection of records was then conducted.

The meeting adjourned at: 10:45 AM.

Respectfully submitted,

Neil Appel, C.P.M.  
Purchasing Manager

*If we do not receive correspondence regarding the accuracy of these minutes within 24 hours, we will assume they have been accepted as correct.*





# RFP PRE-PROPOSAL MEETING SIGN-IN SHEET

PROJECT #: 03-2023

PROJECT NAME: CITY OF BELLE GLADE FORENSIC AUDIT SERVICES

DATE: 3/8/2023

	Company/Representative	Address	Phone & Fax #	email
1	Paul Spad COIG	110 Dr MLK Blvd W 33430	561-996 0100	magdo.belegade@fl.com
2	John Heller	201 E Las Olas Blvd 25th Floor Ft Lauderdale	954-320-8154	john.heller@marcunilp.com
3	Diana Saffery	110 Dr MLK Blvd, W.B.G.	561-992-2207	dianaheso@belleglade-fl.com
4	Chris Patrick	110 Dr. MLK Blvd West	561-992-1624	cpatrick@belleglade.com
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				