

SECTION VI - COST PROPOSAL PAGE

Proposer Name: Kaufman, Rossin & Co.

Proposer agrees to supply the services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFQ.

Proposal – Cost Information

Construction Contract Audit Services	Firm, Fixed Project Cost
1) Las Olas Blvd Corridor Improvement Project- Garage	\$ 74,500
2) Las Olas Blvd Corridor Improvement Project – Open space	\$ 82,500
3) Aquatics Center Improvements Project	\$ 66,000

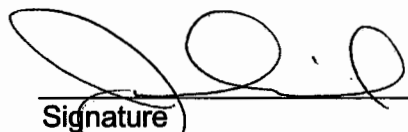
Total Project Cost \$ 223,000

NOTE: Pricing should be included in this RFQ, but it MUST be submitted in a separate SEALED PACKET/ENVELOPE. The Proposer shall label both packets/envelopes according to the requirements in Section IV of this RFQ. Sealed Pricing will be opened upon selection of short list of proposers. Should the pricing be included in the same packet as the proposal, and not be kept separate, the proposal may be deemed non-responsive. Do NOT include pricing on the Flash Drive Copies.

Submitted by:

Jason Chortins
Name (printed)

4/10/2017
Date


Signature

Principal
Title

**ORIGINAL
BID**

Construction Contract Audit Services

from Kaufman Rossin

PREPARED FOR
CITY OF
FORT LAUDERDALE



CITY OF FORT LAUDERDALE

03

Executive Summary

FIRM PROFILE

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Qualifications and Experience

WHY KAUFMAN ROSSIN?

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Your Team

THE TEAM OF EXPERTS WORKING ON YOUR ENGAGEMENT

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Approach to Scope of Work

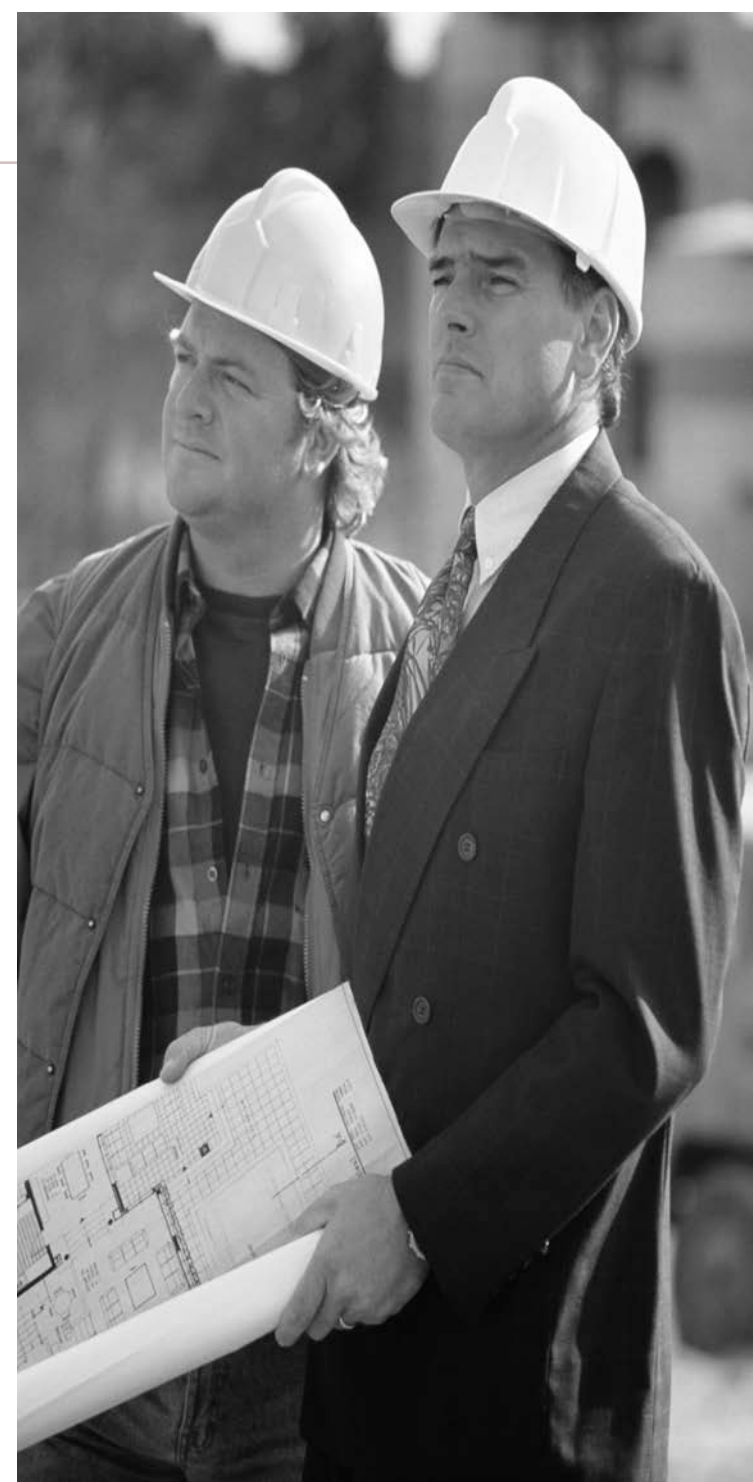
OUR SOLUTION TO YOUR NEEDS, GOALS, & OBJECTIVES

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References

WE WELCOME CALLS TO OUR REFERENCES

REQUIRED FORMS AND PRICING PROVIDED SEPARATELY



Who we are



- One of the top CPA and advisory firms in the United States
- Based in South Florida, serving clients in all 50 states, and more than 40 countries
- Advising businesses and their owners for more than 50 years
- Top-tier technical skills, quality control practices and technologies
- Notable areas of specialty include: domestic and international taxes, manufacturing and distribution, real estate, alternative investments, and forensic/advisory services
- Members of the American Institute of Certified Public Accountants' Center for Audit Quality
- Registered with and subject to inspection by the Public Company Accounting Oversight Board



- Perennial winner of South Florida Business Journal Best Place to Work Surveys
- Best Accounting Firm to Work for in the United States for 6 years
- Low turnover rate
- Kaufman Rossin University offers more than 330 professional development courses per year



- The world's largest alliance of independent accounting firms in the world.
- More than 630 member offices across 103 countries.
- Access to the expertise of more than 3,290 partners worldwide.

About Kaufman Rossin

Kaufman Rossin has represented Florida businesses for more than 50 years and serves international clients in dozens of countries. The CPA and advisory firm is one of the largest in the U.S., providing traditional accounting, audit and tax services, as well as business, risk and forensic advisory services. The firm has won significant awards, including repeat honors as the Best Accounting Firm to Work For among large firms nationwide and locally. With more than 300 team members, the firm prides itself on offering the resources of a powerhouse, personally delivered.

KAUFMAN | ROSSIN

www.kaufmanrossin.com



We've been **trusted advisors** to businesses nationwide for over 50 years, building long-term relationships based on **trust and reputation**. Our clients appreciate that **we care about their business** and strive to identify opportunities to help them succeed. Our client base includes public companies as well as large privately-owned businesses, doing business within the United States and internationally.

Our focus on employee satisfaction enables us to retain employees. Our **low staff turnover** means we become team members whose value grows as we learn the nuances of your organization. This translates into **strong client relationships**, well-managed engagements, and powerful teamwork for our clients.

With **five south Florida locations** and more than 360 employees, Kaufman Rossin is one of Inside Public Accounting's Top Firms in the country, and **one of the largest independent CPA firms** in Southeastern United States.

Kaufman Rossin benefits from the great **diversity** of South Florida. More than 170 of our 375 employees are women (46%) and we originate from **over 30 countries** and speak more than **20 different languages**. Our diversity along with our experience is what makes us unique.



Kaufman Rossin Green Initiatives

We believe small actions can make big differences when it comes to preserving our environment. Over the past several years, Kaufman Rossin has developed a variety of green initiatives to strengthen our commitment to conservation.

Paper Recycling

Did you know that one ton of recycled paper saves over 31,000 liters of water, 4,100 kilowatts of electricity and at least 13 trees? That's why we encourage our employees to recycle used paper. Easy access to shredding machines makes it easier to destroy documents and to recycle them with the help of an environmentally friendly shredding company.

Energy Efficient

We use energy efficiency light bulbs that are motion-sensitive in our Boca office which leads to a 35% reduction in energy use than traditional incandescent bulbs.

Our air conditioner doesn't overwork because our tinted windows isolate the heat and preserves the room temperature.

Carbon Dioxide Emissions

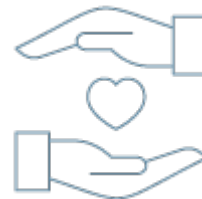
Over 140 employees use a shuttle provided by the company twice a day to take them from the parking lot to our company premises avoiding the individual use of private transportation, therefore reducing carbon dioxide emissions.

Paperless

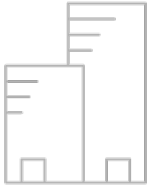
The firm adopted a paperless environment in 2002 and, as a result we only print what it strictly necessary.

Community involvement

With the help of many of our employees, we are actively in over a hundred non-profits organizations such as the United Way of Broward County, Junior Achievement of South Florida and the Museum of Discovery and Science, to name a few.



We know the construction industry



Wherever we go in Florida, the construction and real estate conversation is never far off. Everyone's got an opinion. No one can see the future – and it's always in flux.

Our clients don't come to us for predictions or forecasts. They come for our experience. We've advised clients through more than a half-century of boom, and bust, and boom again.

Having worked with some of the **largest developers, operators, and commercial landlords** in Florida, we understand the construction and real estate business and the complex accounting issues that impact the industry.

Kaufman Rossin's construction and real estate team includes **more than 100 professionals** who provide over **40,000 hours** of service each year to more than **1,500 clients** in every aspect of the construction and real estate industries.

We're also **recognized in the field of real estate**: our peers have voted us "The Best Accounting Firm for Real Estate Support in South Florida" by Daily Business Review's Reader Rankings for three years running.



Our portfolio includes:

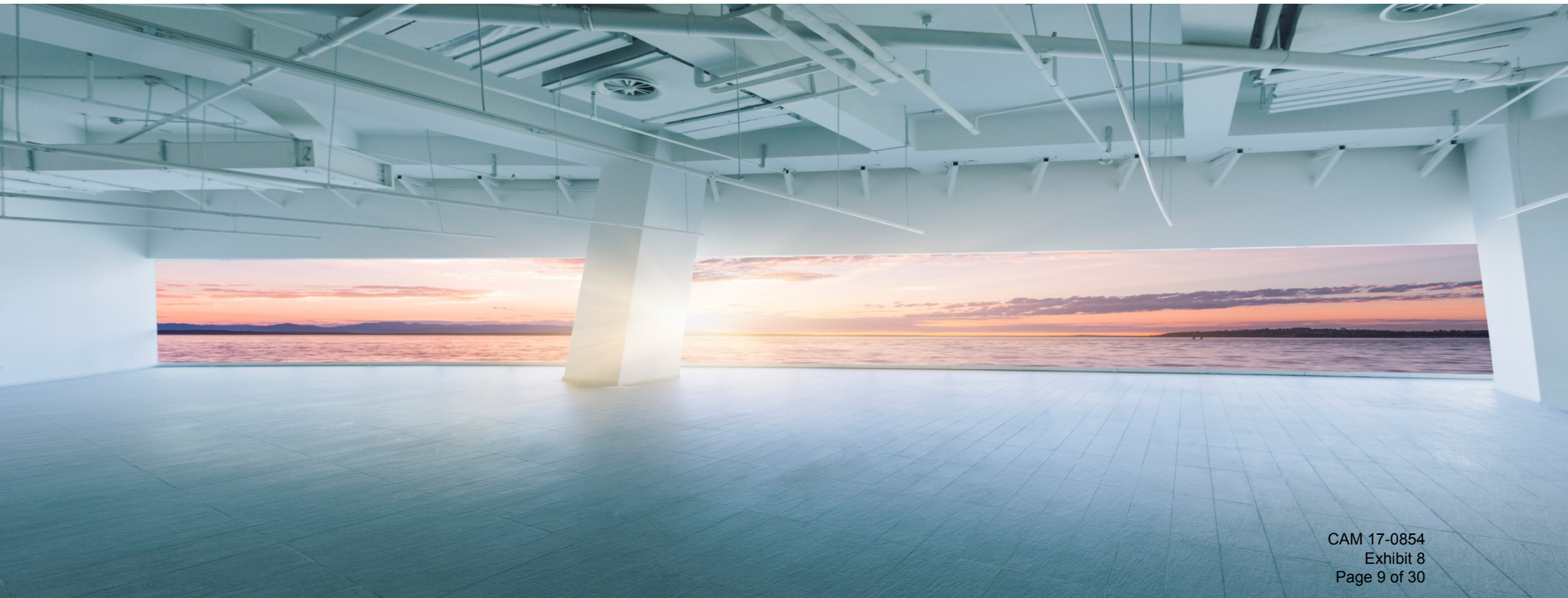
- Real estate developers and owner operators
- Residential – multi-family
- Residential – condominium
- Commercial (retail, office space, hospitality & mixed-use)
- Real estate investors (domestic/international/institutional)
- Real estate investment funds
- Real estate investment trusts (REITS)
- Residential – home builders

We know the construction industry

The accomplishments of every client's business is how we succeed. We have helped companies in the construction industry by performing audit services to all types of contracts and go beyond the numbers to ensure your project's success.

We have worked with clients that have built over 4,500,000 sq. ft. of residential and commercial infrastructure and executed projects worth over \$4billion. We currently serve as auditors to a developer that is completing two high-rise buildings totaling 300,000 sq.ft.

Our in-depth knowledge and technical expertise allows us to understand your construction projects, contracts and processes with minimum disruption.



Additional Top Services to Construction Clients

We have served over **1,500 clients** within the industry, some of the services that we have provided include, but are not limited to:

Tax Services

Preparation of federal and state tax returns and consulting regarding acquisitions and sale, 1031 exchanges and restructuring. International tax consulting and compliance.

Accounting Services

We help clients in the construction and real estate industry gather and organize current financial information, establish appropriate accounting books and records, and implement accounting processes that provide the internal controls.

Property Audits

Audits, reviews, and compilations for companies operating in the residential, commercial office, commercial retail, hospitality and industrial sectors.

Agreed Upon Procedures

Assistance to owners and investors in monitoring their investments through implementing procedures to evaluate performance and compliance by their property manager or joint ventures. Procedures can be tailored to focus on the high risk and key areas of concern or importance.

Acquisition Due Diligence

Comprehensive due diligence including evaluation of projects, testing and review of purchase price models.

Cost Segregation

Preparation of cost segregation studies, in order to maximize tax benefits of accelerated depreciation





RISK ADVISORY SERVICES

Ivan A. Garces, CPA, CFE, CFF, CAMS

Principal – Risk Advisory Services Practice Leader

2699 S Bayshore Drive | Miami, FL 33133

305.646.6054 | igarces@kaufmanrossin.com

EDUCATION

- Masters in Tax from Florida International University

INDUSTRIES

- Banking
- Broker-Dealers & Investment Advisors
- Construction
- Casinos
- Law Firms
- Manufacturing & Distribution
- Technology
- Transportation
- Precious Metals Dealers

Ivan Garces has over 20 years of public accounting experience and is the firm’s Risk Advisory Services Practice Leader. He focuses his practice on providing risk management, forensic accounting and regulatory compliance consulting services to private and publicly traded companies and financial institutions.

He has extensive experience evaluating risk management programs, internal controls, anti-fraud and anti-money laundering programs, USA PATRIOT Act, Bank Secrecy Act, and Office of Foreign Assets Control compliance programs. Ivan has assisted numerous companies and financial institutions respond to regulatory enforcement actions related to such matters. He has also conducted numerous internal corporate investigations into alleged asset misappropriation, financial reporting, money laundering and Foreign Corrupt Practices Act violations.

Ivan has advised a wide range of companies and financial institutions from small privately owned businesses to large multinational institutions in the United States, Mexico, Central America, South America and the Caribbean.

Ivan is the President of the South Florida Chapter of the Association of Certified Fraud Examiners and member of the American Institute of Certified Public Accountants, Florida Institute of Certified Public Accountants, Association of Certified Anti-Money Laundering Specialists and Cuban-American CPA Association.

He is a Certified Public Accountant in Florida, Certified Fraud Examiner, Certified in Financial Forensics and Certified Anti-Money Laundering Specialist.

Ivan earned a bachelor's degree in accounting and a master's degree in taxation from Florida International University. He is bilingual in English and Spanish.



RISK ADVISORY SERVICES

Glenn C. Davis, CPA

Director – Risk Advisory Services

2699 S Bayshore Drive | Miami, FL 33133

305.646.6087 | gdavis@kaufmanrossin.com

Glenn Davis is a director of the risk advisory services department at Kaufman Rossin.

He was formerly a partner with CohnReznick Advisory Group and the national director of its Governance, Risk and Compliance practice. He is considered an expert in the field.

Prior to joining CohnReznick, Glenn served as the CEO and chairman of a publicly traded company. He also served as a senior audit and consulting partner in the New York and national offices for a Big Four firm where he provided accounting, auditing, and consulting services to private, not-for-profit and publicly held clients of all sizes and industries. There, he co-founded that firm's IT Audit and Internal Control Specialist Group and co-authored the Handbook of EDP Auditing, a 1,100-page definitive reference book on the subject of IT auditing, risk management and internal control.

Glenn utilizes tested, state-of-the-art tools and methodologies to perform initial compliance readiness and gap analyses, reviews and tests of controls, and provides continuous monitoring and improvement to reduce audit committees' and board of directors' risk and exposure.

He has authored articles and has been quoted in several publications, including Directors' Monthly (National Association of Corporate Directors), ComplianceWeek, PAR, Corporate Board Member, Financial News, and Business Finance.

Glenn is a member of the American Institute of Certified Public Accountants and was on the advisory committee of the New Jersey Chapter of the National Association of Corporate Directors.

EDUCATION

- B.A., M.A.,
City University of
New York, Baruch
College.

INDUSTRIES

- Manufacturing &
Distribution
- Financial Services
- Professional Services
- Technology
- Construction
- Hospitality
- Retail
- Non-Profit
- Health Care



FAMILY OFFICE & BUSINESS SERVICES

A. Todd Kesterson

Director – Family Office & Business Services

2699 S Bayshore Drive | Miami, FL 33133

305.646.6157 | tkesterson@kaufmanrossin.com

Todd Kesterson leads Kaufman Rossin's family office services practice, using the latest technology to provide sophisticated accounting, tax, and business consulting services to high-net-worth individuals, family offices, and their closely held businesses.

His expertise includes family business consulting, investment analysis, estate and business planning, internal controls, risk management, budgeting, and cash management. He has consulted on lifestyle management, residential and commercial construction projects, and managed personal financial affairs for a variety of clients such as business owners, private investors, fund managers, and entertainment professionals. Todd co-developed and uses Kaufman Rossin Connect's industry-leading, cloud-based technology ecosystem to provide his family office clients with real-time access to accounting and financial reporting.

Before joining the firm in 2014, Todd served as president and chief financial officer for the private wealth management office of a high-net-worth Dallas family for nearly 15 years. In that role, he was involved with all aspects of the family's business and personal affairs, including wealth transfer and tax planning, public and private investing, accounting and reporting, forecasting, asset protection, risk management, human resources, and private foundation operations and compliance.

Todd is a frequent speaker and author who has been featured in several media publication, including Forbes, The New York Times, Bloomberg, Financial Advisor IQ, and South Florida Business & Wealth.

He is a Certified Public Accountant in Florida and Texas and is a member of the American Institute of Certified Public Accountants and the Texas Society of Certified Public Accountants.

EDUCATION

- B.S. Accounting
University of North Texas
- M.S. Acct & Tax
University of North Texas

INDUSTRIES

- Investments
- Professional Services
- Construction
- Insurance



ENTREPRENEURIAL SERVICES

Terri Richards, CPA

Associate Principal – Entrepreneurial Services

1 Town Center Drive, Suite 400 | Boca Raton, FL 33486

561.620.1735 | trichards@kaufmanrossin.com

Terri joined Kaufman Rossin in 2004 and is a manager in the Entrepreneurial Services department. Terri provides a variety of services including financial statement reviews and compilations for closely-held businesses, and tax planning and compliance for corporations, partnerships and high-net worth individuals.

She has a focused expertise in financial reporting and taxation for construction clients. In addition, she provides technology consulting and training to clients including QuickBooks. As a Certified QuickBooks ProAdvisor, she trains business owners and their staff on maintaining clear financial reporting to analyze business performance and goals.

Terri is a Certified Public Accountant in Florida and Massachusetts, and a member of the American Institute of Certified Public Accountants and Florida Institute of Certified Public Accountants. In addition, she is a member of the National Association of Women in Construction (NAWIC) and CREW Fort Lauderdale/Boca Raton.

EDUCATION

- B.S. Accounting
University of
Massachusetts

INDUSTRIES

- Construction
- Manufacturing &
Distribution
- Hospitality
- Retail
- Real Estate
- Professional Services



RISK ADVISORY SERVICES

Justin Gwin, CIA, CISA, CPA, CRISC, CRMA

Manager –Risk Advisory Services

1 Town Center Drive, Suite 400 | Boca Raton, FL 33486

305.646.6088 | jgwin@kaufmanrossin.com

EDUCATION

- B.S. Information Systems,
- M.S. Accounting, University of Missouri

INDUSTRIES

- Manufacturing & Distribution
- Hospitality
- Technology
- Real Estate
- Professional Services
- Financial Services

Justin Gwin is a manager in our risk advisory practice. After beginning his career with Kaufman Rossin in the assurance services department, he spent four years at our Praxity affiliate firm, Mazars, in the United Kingdom. Working for Mazars in London, he gained extensive knowledge of the financial services industry conducting internal audits, compliance examinations and controls evaluations for global corporations.

Justin has over a decade of experience in financial, operational and IT related controls testing. He leads the governance, risk and internal controls services for the practice. Justin’s experience spans across numerous industries of all sizes. His specialties include business process control assessments, compliance reviews, information technology & security evaluations, risk management assurance, Service Organization Control (SOC) reporting, SOX compliance, internal audit and external quality assessment reviews.

He is a Certified Internal Auditor, Certified Information Systems Auditor, Certified Public Accountant in Florida, is Certified in Risk and Information Systems Control, and Certified in Risk Management Assurance.

Justin is the President of the Institute of Internal Auditors (IIA) Miami chapter. He is also a member of the Information Systems Audit and Control Association (ISACA), American Institute of Certified Public Accountants (AICPA), and Florida Institute of Certified Public Accountants (FICPA).

Justin earned a Master’s degree in Accounting from the University of Missouri-Columbia, including a graduate certificate in information systems.



Background and Needs:

The City Auditor for the City of Fort Lauderdale is seeking construction audit services for three capital projects. All three projects are part of the Fort Lauderdale Beach Community Master Plan and the Beach Community Redevelopment Agency (CRA) will provide overall construction project management oversight. The projects are:

- 1) The Olas Boulevard Corridor Improvement Project (Phase I)
- 2) The Olas Boulevard Corridor Improvement Project (Phase II)
- 3) Aquatics Center Improvements

Scope:

The concept for this engagement is to have an audit presence throughout the construction process to ensure that contract terms are fulfilled, that the City receives exactly what it is paying for, to mitigate against cost overruns, unidentified risks and potential fraud. Examining the quality of materials or design is outside the scope of this engagement. We expect to be on site regularly, attend all contractor and city construction meetings, inspections and all other construction events, review the “pencil copy” monthly pay estimates as well as the supporting source documents at contractors’ offices for all pay estimates.



Construction Contract Compliance

The key objective is to ensure that contract terms are executed as expected and agreed. Our role will be to provide oversight for each project as well as constant communication to the City Auditor's Office (CAO).

Our objectives:

- Evaluate the adequacy of internal controls over the construction project.
- Determine if contractors are obtained efficiently and at a favorable price.
- Determine the extent of compliance with the terms of the contract.
- Verify the propriety of the amounts paid for construction.
- Identify and quantify overcharges to the construction project.
- Validate that budgets are accurately reflected and updated against actual costs.
- Verify change orders and ensure proper approval within agreed policies.
- Determine that assets are properly classified and componentized.
- Observe and monitor work site progress against planned schedule.



Construction Contract Compliance

Our approach:

- Review and evaluate contract language
- Review policies and procedures for planning and approval process
- Inspect budgets, expense monitoring, daily activity reports, project scheduling, and other planning and monitoring documents
- Examine purchase orders, change orders, rental equipment records, billings, time sheets, payroll records, etc.
- Review disbursement process, including lien waivers and retention requirements per the terms of the contract
- Verify calculation of contractor's fees
- Recommend control improvements during the audit process
- Communicate any issues or concerns with the City on a timely basis

Phase I



Phase II



Phase III



Phase IV



Phase I

- Review of technical and financial project requirements
- Understand definitions of project scope of work, project requirements and decision making criteria for bidder selection

Phase II

- Conduct bid pricing evaluations
- Assessment of financial strength of bidders
- Contract price schedule evaluation
- Subcontractor and supplier relationship assessment

Phase III

Examine records and monitor job site for:

- Improper paying and billing
- Improper equipment billing
- Improper materials billing
- Safety and environmental problems
- Improper site security

Phase IV

- Review of Operations and maintenance requirements
- Independent assessment of bid evaluations
- Independent financial analysis of extras and change orders

Understanding the Potential for Fraud

Large-scale construction projects are particularly vulnerable to fraudulent behavior for several reasons, including:

- **Project size:** the multimillion dollar contracts associated with these projects provide the temptation for unethical and illegal behavior. The scale of the project makes it easier to hide illegal activity.
- **Project complexity:** these projects typically involve dozens of contractors and subcontractors, many providing a very specific set of services that are difficult for owners, construction management firms, and general contractors to monitor.
- **Concealed nature of work product:** much of the work performed in a construction project is concealed from public view. It takes a trained eye to identify and evaluate actual and potential problems.

As a result of these factors, unscrupulous contractors may perceive that the opportunity to gain via fraudulent behavior is significant while the likelihood of being caught is minimal. Fraud prevention begins with an understanding of the many ways fraud can occur on a construction project.

CONSTRUCTION FRAUD:

Fraud, waste, abuse of contracts and other criminal behaviors, sometimes referred to as "project leakage," have been shown to add as much as 20 to 25% to the total cost of construction projects.

But perhaps even more costly is the breach of the public and/or shareholder trust, a tarnished brand, and the impact on the organizations' ability to successfully manage future projects. These costs can be incalculable.

Due to the potential for fraudulent and criminal behavior in large construction projects involving dozens of contractors and the costs of such activities, construction owners are creating fiscal and integrity monitoring programs to reduce or eliminate their exposure to these risks.



Understanding the Potential for Fraud

From our experience performing construction fiscal and integrity monitoring work, we have we have developed the following list of opportunities for fraud to occur throughout the lifecycle of a construction project. An extract of the risks that we will be considering throughout the engagement is provided below:

Phase I



Phase II



Phase III



Phase IV



- Phase I**
- Bribes or illegal payments in return for permissions, authorizations, waivers, etc.
 - Improper definitions of project scope of work, project requirements, or decision-making criteria to illegally favor one bidder
 - Improper definition of project scope of work, project requirements, or decision-making criteria to produce no bids so that the public bid process can be overlooked and the project awarded to a preferred vendor

- Phase II**
- Qualified vendors improperly rejected at the pre-qualification stage as a result of illegal or improper activities
 - Information of vital importance to the owner is provided only to a preferred bidder in response for a bribe
 - Private bid-opening that enables a preferred vendor to revise its bid
 - Bidder collusion that enables artificially high contract awards as bidders illegally “share the market”
 - Supplier or subcontractor collusion to fix an artificially high price for materials or specialized subcontracting services

- Phase III**
- Excess resources assigned to a project that is charged to the project
 - Work slowdowns are initiated to incur overtime charges
 - Kickbacks and bribes are issued in return for inflated materials pricing; use of materials on other projects
 - Artificially high claims for project equipment by billing for equipment not on-site or not necessary for the project
 - Project is billed for higher equipment billing rates than allowed by contract
 - Equipment is double-billed and/or set at artificially high utilization rates

- Phase IV**
- Illegal payments to owner’s representatives in return for being awarded maintenance and support contracts
 - Approval of significant extras and change orders
 - Insufficient site security or poor enforcement of security regulations

Construction Contract Compliance

Deliverables:

Workpapers & Audit Report

- Detailed workpapers covering the full scope of the audit.

Workpapers will be made available upon request throughout the project to ensure transparency of audit work performed. Each item within scope will be included as well as the testing stage, results and identification of the individuals responsible for conducting the tests. This written documentation of our work will support the continuous and open verbal communication we have with the CAO.

- A comprehensive written report which contains three main sections.

The 'Overview' will indicate the overall objective and scope of the project. It will also reflect our approach to conducting the assessment. The 'Executive Summary' will include high level information about the project and engagement scope. This section will also have a brief summary of the significant findings. The 'Findings and Recommendations' section will provided a detailed explanation of each finding. We will also describe the risk exposure due to the finding and suggest an optimal solution.

Timing and Resource:

We expect to be onsite 1-2 times per week throughout the life of the project(s) beginning in late April / early May. Our resource commitment will be regularly reviewed and adjusted accordingly with the needs of the project. We will schedule regular meetings with the CAO to provide updates of the status of our work and communication any other concerns that arise as a result of our testing.





*We welcome calls
to our references below.*

Green Light Partners LLC
5230 Loreda Way
Wellington, FL 33414

Thys Hynecker
Owner's Representative
theyneker@roundhillcapital.com
541.408.6222

Scope of Project:
- Financial controls, project oversight, & administration of a Polo Farm. Estimated cost: \$30M. Estimated Completion: Q2 2018

Private Client
135 Gulfstream Rd
Palm Beach, FL 33480

Thys Hynecker
Owner's Representative
theyneker@roundhillcapital.com
541.408.6222

Scope of Project:
- Financial controls, project oversight, & administration of a private members club. Estimated cost: \$15M. Estimated Completion: Q4 2017

Carriage House Properties
242 Phipps Plaza
Palm Beach, FL 33480

Thys Hynecker
Owner's Representative
theyneker@roundhillcapital.com
541.408.6222

Scope of Project:
- Financial controls, project oversight, & administration of a private members club. Estimated cost: \$35M. Estimated Completion: 2019



CONTRACT PAYMENT METHOD BY P-CARD

THIS FORM MUST BY SUBMITTED WITH YOUR RESPONSE

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to payment by credit card via MasterCard or Visa. This allows you as a vendor of the City of Fort Lauderdale to receive your payment fast and safely. No more waiting for checks to be printed and mailed.

Payments will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, firms must presently have the ability to accept credit card payment or take whatever steps necessary to implement acceptance of a credit card before the commencement of a contract.

Please indicate which credit card payment you prefer:

_____ MasterCard

___X___ Visa Card

Company Name: _____ Kaufman, Rossin & Co. _____

Jason Chorlins
Name (printed)

[Signature]
Signature

4/10/2017
Date:

Principal
Title

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,


3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

<u>NAME</u>	<u>RELATIONSHIPS</u>
N/A	

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

No such relationships exist. 

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local BUSINESS preference classification as indicated herein, and further certifies and agrees that it will re-affirm it's local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

(1) _____ is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the City of Fort Lauderdale current year Business Tax Receipt **and** a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
Business Name

(2) _____ is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Business Tax Receipt **or** a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
Business Name

(3) _____ is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
Business Name

(4) _____ requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
Business Name

(5) _____ requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
Business Name

(6) Kaufman, Rossin & Co. is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. and does not qualify for Local Preference consideration.
Business Name

BIDDER'S COMPANY: _____ Kaufman, Rossin & Co. _____

AUTHORIZED COMPANY PERSON: Jason Chorlins [Signature] 4/10/2017
NAME SIGNATURE DATE

STATEMENT OF QUALIFICATION CERTIFICATION

Please Note: All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) _____ Kaufman, Rossin & Co. _____

Address: _____ 2699 S. Bayshore Drive _____

City: _____ Miami _____ State: _____ FL _____ Zip: _____ 33133 _____

Telephone No. _____ 305.646.6088 _____ FAX No. _____ 786.470.2588 _____ Email: _____ jgwin@kaufmanrossin.com _____

Does your firm qualify for MBE or WBE status: NO _____ MBE _____ WBE _____

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>
1 _____	3/27/2017	_____	_____
_____	_____	_____	_____

VARIANCES: State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. If this section does not apply to your bid, simply mark N/A. **If submitting your response electronically through BIDSYNC you must click the exception link if any variation or exception is taken to the specifications, terms and conditions.**

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, hereby agrees that in no event shall the City's liability for respondent's indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of five hundred dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Jasmin Chortkins
Name (printed)

4/10/2017
Date:

[Signature]
Signature

Principal
Title



ADDENDUM NO. 1

RFP No. 571-11919
TITLE: Construction Contract Audit Services

ISSUED: March 27, 2017

This addendum is being issued to make the following change(s):

1. Section 3.2 Scope of Services: 1st paragraph has been replaced and shall now read:

The CAO is the contract manager for this construction services audit engagement; as such, the CAO contract manager will review and approve all pay applications and/or other related contract issues for the duration of the contract for the selected firm. Additionally, the Scope of Services does not delineate every detail and minor work tasks required to be performed; any and all additions, substitutions and changes must be discussed with the CAO contract manager prior to implementation.

The concept for this engagement is to have an audit presence throughout the construction process to ensure that contract terms are fulfilled, that the City receives exactly what it is paying for, to mitigate against cost overruns, unidentified risks and potential fraud, it is not to determine quality of materials or design, etc. The selected firm will be required, at a minimum, to be on site regularly, attend all contractor and city construction meetings, inspections and all other construction events, review the "pencil copy" monthly pay estimates as well as the supporting source documents at contractors' offices for all pay estimates.

All other terms, conditions, and specifications remain unchanged.

AnnDebra Diaz, CPPB
Senior Procurement Specialist

Company Name: Kaufman Rossin & Co.
(please print)

Bidder's Signature: [Signature]

Date: 4/10/2017



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
1/5/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Wilson, Washburn & Forster Insurance 16505 NW 13th Ave Miami FL 33169	CONTACT NAME: Certificate Dept PHONE (A/C, No, Ext): 305-666-6636 FAX (A/C, No): 305-662-7778 E-MAIL ADDRESS: acsr@wwfins.com
INSURED Kaufman, Rossin & Co., A Professional Association 2699 S. Bayshore Drive #300 Miami FL 33133	INSURER(S) AFFORDING COVERAGE NAIC # INSURER A : Hartford Fire Insurance Co. 19682 INSURER B : Zenith Insurance Company (FL) INSURER C : The Fidelity & Deposit Company INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER: 655268352** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	21SBABY9755	12/23/2016	12/23/2017	EACH OCCURRENCE \$1,000,000. DAMAGE TO RENTED PREMISES (Ea occurrence) \$300,000. MED EXP (Any one person) \$10,000. PERSONAL & ADV INJURY \$1,000,000. GENERAL AGGREGATE \$2,000,000. PRODUCTS - COMP/OP AGG \$2,000,000. \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			21SBABY9755	12/23/2016	12/23/2017	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$10,000.			21SBABY9755	12/23/2016	12/23/2017	EACH OCCURRENCE \$4,000,000. AGGREGATE \$4,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	M1107305	4/10/2016	4/10/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1000000. E.L. DISEASE - EA EMPLOYEE \$1000000. E.L. DISEASE - POLICY LIMIT \$1000000.
C	Crime Coverage			CCP002225120	12/23/2016	12/23/2017	5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER PARTIES OF INTEREST	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/25/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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PRODUCER Integro Insurance Brokers 111 West Campbell 4th Floor Arlington Heights, IL 60005 (847) 385-6800 (847) 385-6801	CONTACT NAME: Integro Insurance Brokers PHONE (A/C, No, Ext): (847) 385-6800 FAX (A/C, No): (847) 385-6801 E-MAIL ADDRESS: david.koenen@integrogroup.com																					
INSURED Kaufman, Rossin & Company, PA 2699 South Bayshore Drive, Suite #500 Miami, FL 33133-5408	<table border="1"> <thead> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A:</td> <td>Lexington Insurance Company</td> <td>19437</td> </tr> <tr> <td>INSURER B:</td> <td></td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Lexington Insurance Company	19437	INSURER B:			INSURER C:			INSURER D:			INSURER E:			INSURER F:		
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COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			01-615-61-94	08/01/2016	08/01/2017	\$10,000,000 each claim / aggregate incld. costs, charges and expenses.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER CANCELLATION

Parties at Interest	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

10:15:59 AM 4/7/2017

Licensee Details

Licensee Information

Name: **KAUFMAN, ROSSIN & CO., PA (Primary Name)**
 Main Address: **2699 S BAYSHORE DR STE 500
 MIAMI Florida 33133-5486**
 County: **DADE**
 License Mailing:
 LicenseLocation:

License Information

License Type: **FIRM**
 Rank: **CPA Firms**
 License Number: **AD0027078**
 Status: **Current**
 Licensure Date: **05/22/1978**
 Expires: **12/31/2017**

Special Qualifications **Qualification Effective**
Corporation

Alternate Names

[View Related License Information](#)

[View License Complaint](#)

2601 Blair Stone Road, Tallahassee FL 32399 :: Email: **Customer Contact Center** :: Customer Contact Center: 850.487.1395

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