City of San Diego

Request for Proposal No. 8955-07-T
Professional Audit Consultant to Support the City's Audit Committee

Volume I – Technical Proposal

Copy

Submitted by:

JEFFERSON WELLS™
A Manpower Company

Jefferson Wells
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I. EXECUTIVE SUMMARY

Jefferson Wells is an international professional services firm that delivers professional services in the areas of internal audit, technology risk management, tax, and finance operations. We serve clients, including more than half the Fortune 500, through highly experienced, salaried professionals working from offices across North America and Europe. This engagement will be delivered by the firm's San Diego office that is presently located in Carlsbad, California.

Jefferson Wells has extensive experience providing auditing, financial management, information technology, and management consulting services to local, state and federal government agencies. Southern California governmental clients include Los Angeles Metropolitan Transportation Authority, Orange County Transportation Authority, County of Orange, Los Angeles Unified School District and the cities of Santa Barbara, Culver City, Imperial Beach, and Pasadena.

Jefferson Wells has reviewed the City's Request for Proposal ("RFP") and is confident in our ability to meet all of your requirements as specified in the RFP. We propose to have our services to the City lead by Robert Miranda, Director of Jefferson Wells and Market Leader of the firm's San Diego practice. Mr. Miranda has extensive experience conducting independent audits for cities, counties and other local governmental organizations in accordance with governmental accounting standards and generally accepted government auditing standards. Mr. Miranda also has extensive Sarbanes-Oxley compliance experience with major corporations and internal audit experience. He is a graduate of the University of Southern California and completed an executive certificate program at the Harvard Business School. He is a licensed California certified public accountant.

Jefferson Wells' back-up consultant for this engagement is Mr. James Santer. He has extensive local government internal auditing experience with the County of Orange and the County of Riverside. Mr. Santer is a Certified Internal Auditor, Certified Information Systems Auditor, and holds various certifications relative to Control Self Assessment.

Jefferson Wells is an internationally recognized expert on internal controls, Sarbanes-Oxley compliance, and risk management. Our firm has performed over 1,200 Sarbanes-Oxley compliance projects for major corporations. Our proposed engagement team for the City of San Diego brings extensive experience in government accounting and auditing coupled with extensive Sarbanes-Oxley and internal controls expertise. We consult frequently with audit committees and boards of directors and share best practices of leading corporate internal audit departments. This combination of internal controls expertise, internal audit governance and practice, and government auditing and accounting experience provides the City of San Diego with a strong value proposition.

We sincerely appreciate your consideration of our proposal and look forward to serving the City of San Diego, its Audit Committee, City Council, and other constituents.

II. SPECIFICATIONS

A. CORE REQUIREMENTS

1. Jefferson Wells' Background

Jefferson Wells is an international professional services firm that delivers professional services in the areas of internal audit, technology risk management, tax, and finance operations. We serve clients, including more than half the Fortune 500, through highly experienced, salaried professionals working from offices across North America and Europe.

Jefferson Wells was founded in 1995 as an independent alternative to public accounting firms for internal audit services. Over the years, we expanded our expertise to include accounting and finance services, tax services and technology risk management. Our unique business model emphasizes seasoned professionals with public accounting and industry experience. Jefferson Wells focuses on client needs and delivers independent, cost-effective results. Our depth and breadth of experience allow us to provide solutions across a wide range of finance related business functions.

Jefferson Wells approaches each engagement with a perspective gained from years of working in partnership with thousands of mid- to large-sized corporations. We have the tools, methodologies and hands-on experience to thoroughly assess problems and determine the best solutions for your organization with flexible delivery options. We can provide assistance including professional staff augmentation, complete project solutions, and thought leadership. Jefferson Wells believes that real solutions come from a deep understanding of our clients' business issues, and from the personalized collaborations we build with our clients.

In 2001, Jefferson Wells became an independent operating subsidiary of $16 billion Manpower, Inc. This relationship with Manpower provides Jefferson Wells the financial support necessary for our aggressive growth plan and the security of constant investment into our company. Jefferson Wells has grown from a single office start-up organization to an international professional services firm with almost 3,000 professionals and nearly 50 offices throughout North America and Europe.

Jefferson Wells has extensive experience providing auditing, financial management, information technology, and management consulting services to local, state and federal government agencies. Southern California governmental clients include Los Angeles Metropolitan Transportation Authority, Orange County Transportation Authority, County of Orange, Los Angeles Unified School District and the cities of Santa Barbara, Culver City, Imperial Beach, and Pasadena.

2. Jefferson Wells' Ability to Support the City's Core Requirements

Jefferson Wells has reviewed the City's Request for Proposal ("RFP") and is confident in our ability to meet all of your requirements as specified in the RFP. We propose to have our services to the City lead by Robert Miranda, Director of Jefferson Wells. Mr. Miranda has extensive experience

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conducting independent audits for cities, counties and other local governmental organizations in accordance with Governmental Auditing Standards. Mr. Miranda also has extensive Sarbanes-Oxley compliance experience and internal audit experience. A summary profile of our Mr. Miranda follows and a detailed resume is attached as Appendix A to this proposal:

Summary of Experience:

Robert Miranda, Director with Jefferson Wells, has over 30 years' experience in accounting, auditing, finance operations, and management consulting. His management experience spans a variety of industries including government, real estate, aerospace & defense, automotive, consumer products, distribution, engineering & construction, financial services, healthcare, manufacturing, and technology in both the private and public sectors for domestic and international organizations. He is the firm's Market Leader in San Diego, responsible for overall operations of the San Diego office.

Experience Relevant to the City of San Diego Specifications

City and Other Government Auditing Experience

Mr. Miranda has extensive experience in auditing and consulting with governmental organizations in accordance with government accounting standards and generally accepted government auditing standards. He has served as audit partner and director for audits and consulting engagements at various governmental organizations including cities, counties, colleges, universities, and other local government agencies.

Mr. Miranda has previously served as audit partner for annual financial audits at the City of Los Angeles, City of Santa Ana, and County of San Bernardino. He has led audit engagements at the counties of Orange and Los Angeles, Los Angeles Metropolitan Transportation Authority, Orange County Transportation Authority, University of California (Irvine and Riverside), and several California state agencies including CALTRANS, Department of Water Resources, and Department of Corrections. Mr. Miranda has extensive federal government auditing and consulting services with several agencies including the Agency for International Development (USAID), Resolution Trust Corporation, and the U.S. Departments of Commerce, Energy, Labor, State, Transportation, and Treasury.

Sarbanes-Oxley and Internal Controls Experience

Jefferson Wells is one of the leading consulting firms in the United States providing Sarbanes-Oxley compliance services and internal controls advisory services. Since the implementation of Sarbanes-Oxley section 404 during 2004, Jefferson Wells has assisted over 1,200 companies comply with the documentation, testing, and controls remediation process required by Sarbanes-Oxley section 404.

Robert Miranda is one of Jefferson Wells' national experts on Sarbanes-Oxley section 404 compliance services. Over a three year period Mr. Miranda was responsible for managing the firm's single largest Sarbanes-Oxley section 404 engagement for The Boeing Company. In his role as global operations director for Jefferson Wells' services to The Boeing Company, Mr. Miranda led a team of

over 300 Jefferson Wells' consultants that assisted Boeing with its Sarbanes-Oxley section 404 compliance programs. He provided technical leadership, training, and program management services to Boeing by managing a team of Jefferson Wells' professionals in multiple locations including southern California, Seattle, Chicago, and St. Louis. Mr. Miranda also conducted quality assurance reviews of some of Jefferson Wells' large client Sarbanes-Oxley section 404 engagements including engagements at GMAC and U.S. Bank.

Jefferson Wells' Responses to the City's Core Requirements

Jefferson Wells' specific responses to address the City's Core Requirements (as noted on Pages 18 through 19 of the RFP) are as follows:

1. Jefferson Wells is a recognized national consulting firm that specializes in internal controls, finance operations and technology risk management. We advise audit committees on a wide range of technical matters including internal controls, financial management, risk management, and internal audit functions and activities.

   Robert Miranda, Jefferson Wells' proposed engagement Director for the City of San Diego has over 30 years' experience in accounting, financial reporting, internal controls, and internal audit. His experience includes major corporations such as The Boeing Company, Honda Finance, Fluor Corporation and cities including the City of Los Angeles and Santa Ana.

2. As noted in this proposal, Robert Miranda has prior experience serving as audit partner of outside audits of cities, counties, and other government organizations. He is very knowledgeable in audit vendor procurement processes and can advise the Audit Committee on technical accounting and auditing matters as well as review and evaluate the work of the outside auditors, when appropriate.

3. Jefferson Wells has read the SEC Cease-And-Desist Order dated November 14, 2006 and the requirements and scope of work of the Independent Consultant and Outside Disclosure Counsel. Jefferson Wells' professionals have extensive expertise in internal controls, financial reporting, governmental accounting and auditing standards, and SEC reporting. We may assist the Audit Committee to review and evaluate reports and recommendations of the Independent Consultant and Outside Disclosure Counsel and assist the Audit Committee to respond to any findings or recommendations that may be forthcoming from these monitors.

4. Jefferson Wells has experience advising Audit Committees and Boards of Directors on financial reporting disclosures and the related internal controls. Robert Miranda, Jefferson Wells' proposed Director, has extensive experience reporting to elected and appointed officials including City Councils, School Boards, and Commissions.

5. Jefferson Wells has experience advising clients on the formation and operation of audit committees, including developing charters for internal audit organizations and related corporate governance matters. We can assist the Audit Committee and City Council to develop appropriate language for a ballot initiative to institutionalize the Audit Committee.

6. Jefferson Wells may assist the Audit Committee and City Council on the recruitment and selection process of internal auditors. We can review candidates' credentials and qualifications, assist in the candidate interview process, assist in verifying candidates' references, and assist with the final selection process.

7. Jefferson Wells has experience advising Audit Committees and Boards of Directors on establishing internal audit departments and programs. We have assisted clients develop a fully-functioning internal audit department that can effectively audit administrative, financial and operational controls. We are knowledgeable in the best practices of leading companies relative to internal audit governance and advise clients on implementing internal audit best practices.

8. Jefferson Wells has experience conducting internal audit risk assessments and developing audit plans. We may advise the Audit Committee on the risk assessment and audit plan to ensure completeness, relevance and review the adequacy of audit coverage.

9. Jefferson Wells has experience reviewing preliminary audit findings and recommendations on behalf of management and Audit Committees. We can participate in periodic audit status reports, review initial audit results, and advise the Audit Committee and City Council on the audit findings and recommendations. We can also independently advise the Audit Committee and City Council on risk-ranking audit findings and prioritizing implementation of solutions.

10. Jefferson Wells internal audit experience will enable the firm to assist the Audit Committee and City Council to analyze and evaluate audit-related legislative actions on the applicable dockets and advise the Audit Committee and City Council on these matters.

11. Jefferson Wells' professionals who will be assigned to the City have extensive internal audit and external audit experience. As such, we are capable to advise the Audit Committee in reviewing and analyzing audit-related reports that may come from the Mayor's office or outside auditor.

12. Jefferson Wells' has experience developing internal audit charters and monitoring internal audit department activities relative to the charter. We can assist the Audit Committee, City Council, and Mayor's Charter Commission by providing research and developing supporting documentation as needed.

13. Jefferson Wells' has experience conducting evaluations of policies, procedures and practices relating to internal controls. We have experience conducting efficiency and effectiveness audits which we can apply to evaluating City procedures and practices.

14. Jefferson Wells' has experience assisting clients to remediate internal control deficiencies and testing the effectiveness of internal controls. The Kroll Remediation Plan calls for several reforms of the City's governance process that Jefferson Wells is well-suited to support and independently advise the Audit Committee and City Council.

15. Jefferson Wells' has experience conducting surveys and benchmarking reviews of best practices of private sector audit committees and internal audit organizations. Our public sector auditing experience coupled with our extensive private sector experience with audit committees uniquely qualifies Jefferson Wells to assist the Audit Committee assess best practices.

16. Jefferson Wells' is accustomed to making oral and written presentations to Audit Committees and Boards of Directors. As experts on internal controls and government accounting practices, we are well-suited to support the Audit Committee in all its needs for independent and objective advice.

B. QUALIFICATIONS AND EXPERIENCE

Jefferson Wells is pleased to address the specific questions on pages 19 through 20 of the RFP as follows:

1. Jefferson Wells proposes to manage this engagement from its office in Carlsbad, California. As stated in this proposal, the principal consultant who we propose to perform these services is Mr. Robert Miranda, Director of Jefferson Wells. Mr. Miranda is currently managing several client projects in San Diego and is available to attend meetings at City Hall on a regular basis. Jefferson Wells also proposes a back-up staff person, Mr. James Santer, who also has extensive government audit experience. His resume is included as Appendix A to this proposal.

2. Jefferson Wells' primary consultant for this engagement has extensive experience providing independent auditing services to local governments, including the City of Los Angeles and City of Santa Ana. He also has considerable experience providing advice to audit committees of major corporations, including The Boeing Company. While Mr. Miranda has prior experience undergoing peer reviews under government and AICPA auditing standards, Jefferson Wells is not subject to peer review requirements as it does not operate as a CPA firm.

3. Jefferson Wells' proposed primary and back-up consultants for this engagement have extensive experience with the elements of internal controls as identified by the COSO framework. Our recent experience with COSO has been while performing Sarbanes-Oxley section 404 compliance services to private sector public companies. Sarbanes-Oxley and the related SEC and PCOAB guidance require adherence to an integrated internal control framework and most U.S. companies that Jefferson Wells has served have followed the COSO framework.

4. Jefferson Wells' proposed primary and back-up consultants for this engagement have extensive experience with all aspects of the Sarbanes-Oxley Act of 2002 and have assisted major companies to comply with these requirements. Our extensive knowledge of Sarbanes-Oxley coupled with our government accounting and auditing expertise make us uniquely qualified to assist the City of San Diego's Audit Committee and City Council.

5. Jefferson Wells' primary consultant, Mr. Robert Miranda, holds a Bachelor of Science degree in accounting from the University of Southern California and has completed an executive

management certificate program at the Harvard Business School. Our back-up consultant, Mr. James Santer, holds a Bachelor of Science degree from Southern New Hampshire University.

6. Jefferson Wells' primary consultant, Mr. Robert Miranda, is a licensed California Certified Public Accountant. Our back-up consultant, Mr. James Santer, is a Certified Internal Auditor (CIA); Certified Information Systems Auditor (CISA); and Certified Control Self Assessment (CCSA)

7. Jefferson Wells' proposed primary and back-up consultants for this engagement have extensive experience with government accounting standards and generally accepted government auditing standards. They have knowledge of municipal finance principles, accounting systems, budgeting, procurement and investments, integrated computer based accounting systems and practices of internal and administrative controls. Our primary consultant, Robert Miranda, has extensive government audit and consulting experience that has been discussed earlier in this proposal. Our back-up consultant, Mr. James Santer, has extensive government auditing and consulting experience from his past employment with the internal audit departments of the County of Orange and the County of Riverside.

8. Jefferson Wells' proposed primary and back-up consultants have prior experience working with elected and appointed officials, local government audit professionals and outside audit firm. As an example, Mr. Miranda has previously testified before the United States Senate Finance Committee as an expert witness on proposed tax legislation. We routinely work with client Audit Committees, internal audit professionals and external auditing firms.

9. Jefferson Wells' proposed primary and back-up consultants have extensive prior experience in all aspects of the requirements specified by the City's RFP and are highly qualified to assist the Audit Committee members evaluate and understand audit-related issues and assist them to perform their oversight role over financial reporting and disclosure.

C. REFERENCES (PAST PERFORMANCE)

Jefferson Wells is pleased to provide three references of work performed during the past three years that is relevant to the requirements of the City's RFP:

1. County of Orange
   Internal Audit Department
   Mr. Eli Littner
   Deputy Director of Internal Audit
   400 Civic Center Drive West, Room 232
   Santa Ana, California 92701
   Telephone (714) 834-5899

   Description of Services: Jefferson Wells has performed several projects for the County of Orange, including a Quality Assurance Review (QAR) and a management review of the County's Human Resources Department.

2. Orange County Transportation Authority
   Internal Audit Department
   Mrs. Kathleen O'Conner
   Director of Internal Audit
   P.O. Box 14184
   Orange, California 92863-1584
   Telephone (714) 560-5669

   Description of Services: Jefferson Wells has performed several audits for OCTA's Internal Audit Department including construction audits and Information Technology (IT) audits.

3. The Boeing Company
   Mr. Harry S. McGee III
   Vice President and Corporate Controller
   100 Riverside Drive
   Chicago, Illinois
   Telephone (312) 544-2670

   Description of Services: Jefferson Wells has served as Boeing's Sarbanes-Oxley (SOX) 404 advisory services firm since 2003, the inception of Boeing's SOX compliance program. Jefferson Wells SOX 404 enterprise level services to Boeing include: (1) assistance with the initial development of Boeing's SOX compliance program, including its management assessment process, documentation and testing methodologies, quality assurance program, and program management oversight process; (2) training of Boeing and Jefferson Wells professionals on its SOX methodology and Quality Assurance program; (3) and service on Boeing's SOX Steering Committee.

D. PROPOSERS IMPLEMENTATION PLAN

Jefferson Wells' implementation plan for our proposed advisory services to the City of San Diego will be based on our proven engagement management methodology utilizing our Service Quality Process. Jefferson Wells Service Quality Process ("SQP") was implemented to exceed client expectations for quality assurance and service. The process begins at the first contact and continues throughout the engagement until it closes. Our methodology will focus on partnering with the City's Audit Committee to improve processes and enhance business performance. The following summary provides an overview of our Service Quality Process to ensure client satisfaction before, during, and following completion of our engagements.

Before an engagement begins we meet with the client team to ensure a common understanding of the engagement's scope, objectives, and timelines. During the engagement we hold regular (we suggest weekly) status meetings with the client team to ensure day-to-day operations, results, and any

issues are commonly understood and addressed. Communication protocols are designed with the client culture in mind. The objectives of tracking and formally reporting the engagement status are to:

- Provide a consistent technique for monitoring progress against plan.
- Identify any issues quickly to allow for timely corrective action.
- Provide an objective rather than subjective evaluation of status.
- Provide timely information on a regular basis.
- Provide a managerial evaluation rather than just raw facts.
- Assist with obtaining buy-in of any audit recommendations on a timely basis.

Jefferson Wells uses proactive measures to ensure communications, both written and oral, are ongoing, relevant and routine to our engagements. Our commitment to this practice ensures open lines of communication and often prevents and/or mitigates service delivery issues. Our professionals are trained in documenting observations, recommendations, business issues and new developments as part of their daily routine. At the completion of the engagement we send an electronic customer satisfaction survey to our client to solicit feedback, input, and suggestions.

The benefit of our Service Quality Process to the City is significant.

- Promotes consistency of our engagements.
- Avoids surprises.
- Significantly reduces risk for us and you, the client.
- Promotes client satisfaction.
- Helps to ensure accurate and complete deliverables throughout the engagement.
- Ensures clear understanding of objectives and deadlines.
- Promotes flexibility within each engagement.
- Monitors engagement's progress against client budget.
- Promotes thorough and constant communication with the client.

E. OPTIONAL CONSULTING SERVICES

Jefferson Wells would be pleased to perform as-needed optional consulting services that the City may request that are within the scope of services of the RFP. Our service offerings include finance operations, accounting, information technology risk management, internal audit outsourcing and co-sourcing, and other advisory services.

III. APPENDIX A - RESUMES

ROBERT J. MIRANDA, ENGAGEMENT DIRECTOR

Summary

Robert Miranda, Director and Market Leader of Jefferson Wells' San Diego office, has over 30 years of experience in accounting, auditing, finance operations, and management consulting. His management experience spans a variety of industries including government, real estate, aerospace & defense, automotive, consumer products, distribution, engineering & construction, financial services, healthcare, manufacturing, and technology in both the private and public sectors for domestic and international organizations.

Relevant Experience

Mr. Miranda has extensive experience in auditing and consulting with governmental organizations in accordance with government accounting standards and generally accepted government auditing standards. He has served as audit partner and director for audits and consulting engagements at various governmental organizations including cities, counties, colleges, universities, and other local government agencies.

Mr. Miranda has previously served as audit partner for annual financial audits at the City of Los Angeles, City of Santa Ana, and County of San Bernardino. He has led audit engagements at the counties of Orange and Los Angeles, Los Angeles Metropolitan Transportation Authority, Orange County Transportation Authority, University of California (Irvine and Riverside), and several California state agencies including CALTRANS, Department of Water Resources, and Department of Corrections. Mr. Miranda has extensive federal government auditing and consulting services with several agencies including the Agency for International Development (USAID), Resolution Trust Corporation, and the U.S. Departments of Commerce, Energy, Labor, State, Transportation, and Treasury.

Robert Miranda is one of Jefferson Wells' national experts on Sarbanes-Oxley section 404 compliance services. Over a three year period Mr. Miranda was responsible for managing the firm's single largest Sarbanes-Oxley section 404 engagement for The Boeing Company. In his role as global operations director for Jefferson Wells' services to The Boeing Company, Mr. Miranda led a team of over 300 Jefferson Wells' consultants that assisted Boeing with its Sarbanes-Oxley section 404 compliance programs. He provided technical leadership, training, and program management services to Boeing by managing a team of Jefferson Wells' professionals in multiple locations including southern California, Seattle, Chicago, and St. Louis. Mr. Miranda also conducted quality assurance reviews of some of Jefferson Wells' large client Sarbanes-Oxley section 404 engagements including engagements at GMAC and U.S. Bank.

Professional Experience:

- Jefferson Wells, Director (4 years)
- Stonefield Josephson, Shareholder/Officer (2 years)
- Deloitte & Touche/Deloitte Consulting, Director (5 years)
- RJ Miranda & Company, Founder & President (15 years)
- KPMG, Audit Professional (6 years)

Education and Certifications:

- Harvard Business School, Owner/President Management Certificate
- University of Southern California (USC), Bachelor of Science, Business Administration and Accounting
- Certified Public Accountant, licensed in California

Selected Presentations:

- *SOX Benchmarking: What Are Other Companies Doing?* The Boeing Company SOX Process Council Summit, Seattle, Washington, August 11, 2005
- *PCAOB: Overview of the Proposed Auditing Standard,* Institute of Internal Auditors, Orange County Chapter, October 18, 2003
- *Examining Key Legal and Financial Issues for Structuring Deals in Latin America,* Private Investment in Latin America Conference, Institute for International Research, Mexico City, Mexico, September 10 and 11, 1998
- Definition of Employee and Modification to Self-employment Tax Treatment of Certain S Corporation Shareholders and Partners, Hearing on Health Security Act of 1994, U.S. Senate Finance Committee, Washington, DC, May 3, 1994.

JAMES SANTER, ENGAGEMENT MANAGER (BACK-UP CONSULTANT)

Summary:

James Santer, an Engagement Manager with Jefferson Wells, has over twenty five years of diversified experience in internal audit management, consulting and information systems auditing. His professional industry experience includes government, healthcare, insurance, and not-for-profit. James' background includes internal controls, facilitation, and training. He is skilled in issue identification and resolution, team facilitation / group dynamics and mediation.

Relevant Experience:

Contracted with two California Counties Health and Human Services Departments to help maximize Federal and State revenue recovery from MediCal, Medicare and Third Party Health Insurance. Claims prepared, submitted and revenues exceeding $2 million achieved.

Coordinated the audit defense for a State of California Unclaimed Property Audit of a major Los Angeles Medical Center. Outcome was a reduction of the audit findings by over six million dollars.

Facilitated 55 Control Self-Assessment (CSA) workshops for County Agencies using the COSO model, concentrating on the Control Environment.

Utilized computer generated statistical reports to target specific medical provider entities for audit purposes in a State Medicaid Program. Assigned audits to field staff, monitored progress and reported findings to management.

Facilitated presentations on the County of Orange, CA experience auditing soft controls using COSO standards and CSA workshops at the 1999 National Association of Local Government Auditors (NALGA) conference, Coast Community College and at the 2000 Professional Education Conference of the Association of Government Accountants.

Professional Experience:

- Jefferson Wells
- County of Riverside: Senior Internal Auditor
- County of Orange: Senior Internal Auditor
- Jewish Federation Council: Systems/Project Manager
- United Way, Inc.: Director of Internal Audit
- New York State, Department of Social Services: Associate Management Specialist

Education and Professional Certifications:

- Bachelor's of Science, Southern New Hampshire University
- Certified Internal Auditor (CIA)
- Certified Information Systems Auditor (CISA)
- Certification in Control Self-Assessment (CCSA)
- Certified Mediator
- Control Self-Assessment (CSA) Facilitator

City of San Diego

Request for Proposal No. 8955-07-T
Professional Audit Consultant to Support the City's Audit Committee

Volume II – Price Proposal

Copy

Submitted by:

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ATTACHMENT 3

CITY OF SAN DIEGO

PURCHASING & CONTRACTING DEPT.
1200 Third Avenue, Suite 200
San Diego, CA 92101-4195

Proposal No. 8955-07-T

REQUEST FOR PROPOSAL

Closing Date: August 20, 2007
@ 4:00 pm P.S.T.

ADDENDUM A

Subject: **Furnish the City of San Diego with Professional Audit Consultant to support the City's Audit Committee**

Timeline: **As may be required for a period of two (2) years from date of award, with options to renew for three (3) additional one (1) year periods, in accordance with the attached specifications.**

Company Jefferson Wells
Federal Tax I.D. No. 39-1845657
Street Address 6185 Paseo del Norte
City Carlsbad
State CA Zip Code 92011
Tel. No. 760 710 3072 Fax No. 760 710 3009
E-Mail debbi.frazier@jeffersonwells.com

If your firm is not located in California, are you authorized to collect California sales tax? _____ Yes _____ No

If Yes, under what Permit # _____

City of San Diego Business Tax License #: 2007025755

Name Debbi Frazier
[PRINT OR TYPE]
Signature* [signature]
Title Managing Director
Date August 20, 2007

*Authorized Signature: *The signer declares under penalty of perjury that she/he is authorized to sign this document and bind the company or organization to the terms of this agreement.*

SUBMITTED PROPOSALS MUST HAVE AN ORIGINAL SIGNATURE.

Cash discount terms _____% _____days. *[Terms of less than 20 days will be considered as Net 30 for proposal evaluation purposes.]*

State delivery time required: _____ days after receipt of order.

FOR CONSIDERATION AS A RESPONSIVE PROPOSAL, THE FOLLOWING IS REQUIRED:

1) **Proposal must be submitted on official City proposal forms.**
2) **All information on this Request for Proposal cover page must be completed.**
3) **This cover page must be signed with an original signature.**
4) **Proposal must be submitted on or before the exact closing date and time. Proposal received after the exact closing date and time will NOT be considered. If hand delivering, please allow enough time for travel and parking to submit by the closing date and time.**

FOR FURTHER INFORMATION CONCERNING THIS PROPOSAL, PLEASE CONTACT:

THOMAS ROY, CPPB/bl9, Principal Procurement Specialist

Phone: (619) 236-6158 Fax: (619) 533-3227 E-mail: TRoy@sandiego.gov

B. PRICE PROPOSAL PAGES

A. FIXED FULLY-BURDENED HOURLY RATES, LEAD CONSULTANT(S) AND KEY PERSONNEL

CONSULTANT NAME	PROJECT ROLE	FULLY BURDENED HOURLY RATES				
		YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Robert J. Miranda	Primary Consultant	$250.00	$262.50	$275.63	$289.41	$303.88
Jame Santer	Back-Up Consultant	$175.00	$183.75	$192.94	$202.58	$212.71

B. OPTIONAL MONTHLY RETAINER

NOT APPLICABLE