



CENTRALBIDDING
FROM CENTRAL AUCTION HOUSE

**SOQ 24-032-Provide a Comprehensive Financial Analysis of certain
Departments and/or Districts of Jefferson Parish**
Jefferson Parish Government

Project documents obtained from www.CentralBidding.com

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General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 24-032-Provide a Comprehensive Financial Analysis of certain Departments and/or Districts of Jefferson Parish

B. Firm Name & Address:

EAG Gulf Coast, LLC
One Galleria Blvd., Suite 2100
Metairie, LA 70001

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Freddy Smith, Partner
Email: fred.smith@eisneramper.com
Phone: 225-922-4600

D. Address of principal office where Project work will be performed:

8550 United Plaza Blvd.
Suite 1001
Baton Rouge, LA 70809

E. Is this submittal by a JOINT-VENTURE? Please check:

YES _____ NO ☒

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

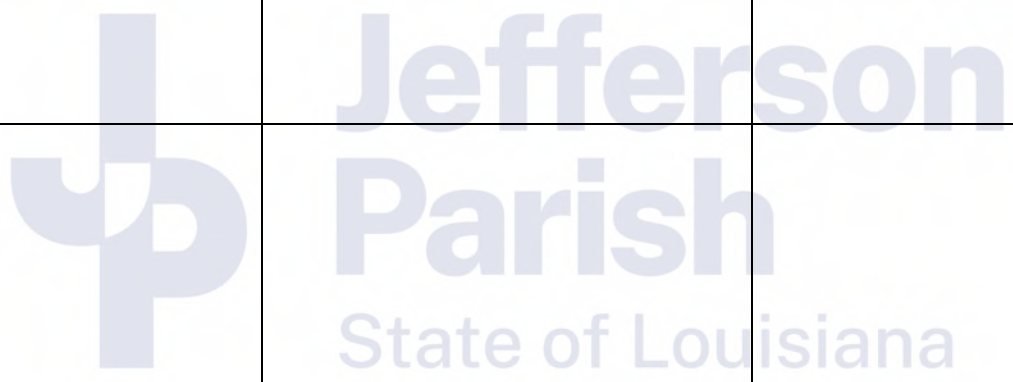
F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1. N/A

2. N/A

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____ N/A		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A		
2.		
3.		
4.		
5.		



General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <u>5</u>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Freddy Smith Partner
Name of Firm with which associated:
EAG Gulf Coast, LLC
Description of job responsibilities:
Freddy serves as the Engagement Partner in compliance and auditing matters.
Years' experience with this Firm:
35
Education: Degree(s)/Year/Specialization:
University of Southern Mississippi; BS, Accounting
Other experience and qualifications relevant to the proposed Project:
Freddy served as the Chairman of several committees relating to governmental accounting and auditing, including the Capital Assets Subcommittee of the Legislative Auditor's GASB 34 Implementation Task Force and the Louisiana Society of CPA's Baton Rouge Chapter Governmental Accounting and Auditing Committee. Additionally, he has spoken on a variety of governmental accounting topics at seminars and conferences conducted for in-house staff, clients, the Baton Rouge Chapter of the LCPA, the Government Finance Officers Association, and the Association of Government Accountants. Freddy has experience advising clients in areas of application of accounting principles, internal control matters, and compliance. Freddy's audit and accounting experience includes working with parish and municipal governments, and state government entities. Freddy has enhanced the firm's specialization in governmental accounting and auditing by obtaining the AICPA's Certificate of Educational Achievement in Governmental and Non-Profit Accounting and Auditing.

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Phillip Rebowe Director
Name of Firm with which associated:
EAG Gulf Coast, LLC
Description of job responsibilities:
Philip W. Rebowe is the Director of Client Services in the firm. As Client Services Director for Jefferson Parish, Philip will be a key contact for the performance of services described in this proposal and will be primarily focused on client service and quality. He will be available to ensure the Parish's service needs are being met and will set a tone of excellent and responsive service that fits the needs of Jefferson Parish.
Years' experience with this Firm:
5
Education: Degree(s)/Year/Specialization:
Bachelor of Science/1978/Accounting, Louisiana State University J. L. Kellogg Business School, Executive Program, Northwestern University
Other experience and qualifications relevant to the proposed Project:
With over 40 years of public accounting experience, Philip has significant experience in a comprehensive range of services, including auditing, tax compliance and planning, and management consulting. His depth of experience and broad business acumen enables him to add value to client relationships through consultation on financial, operational, and compliance matters concerning financial statements, mergers and acquisitions, forecasting, litigation support, and other complex business issues. Philip was the lead independent auditor appointed by the Jefferson Parish Council to audit Jefferson Parish's CAFR for over 20 years during his employment with Rebowe & Company, CPAs and also with Carr, Riggs & Ingram, LLC. As such, he brings substantial experience and knowledge of Jefferson Parish's finances and its operations.

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
Katherine Torres Partner
Name of Firm with which associated:
EAG Gulf Coast, LLC
Description of job responsibilities:
Katherine oversees Outsourced Accounting Services Practice within Eisner Amper's Outsourcing Service Area.
Years' experience with this Firm:
17
Education: Degree(s)/Year/Specialization:
Louisiana State University; BA, Finance, 2007
Other experience and qualifications relevant to the proposed Project:
<ul style="list-style-type: none">-Have worked on state and local governmental projects relating to large program process design, quality control processes, and execution.-Louisiana Department of Education-EANS: EisnerAmper (at the time P&N) provided assistance to LDOE to implement the Emergency Assistance for Non Public Schools Program. This program supported these schools through the purchase and/or reimbursement of items to allow for classroom and school operations during and after the COVID-19 Pandemic. EisnerAmper worked with LDOE to understand program requirements, develop a framework for communicating and deploying on program requirements and worked with LDOE and applicant schools to facilitate the program.-LDOE CCAP: EisnerAmper provided support to LDOE on certain processes related to the LDOE Childcare Assistance Program (CCAP). This included developing standard operating procedures documents, analysis of eligibility files, and working with LDOE program leadership on enhancements to applicant communications.-Worked from 2007-2011 in EisnerAmper's Financial and Valuation Services practice which provided valuation, financial analysis, and economic benchmarking to mid-market clients.

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
Liana Coolman Director
Name of Firm with which associated:
EAG Gulf Coast, LLC
Description of job responsibilities:
Liana is a Director in the Outsourced Accounting Services Practice where she helps lead the team.
Years' experience with this Firm:
3
Education: Degree(s)/Year/Specialization:
University of Miami; Masters of Business Administration, 2009 University of Florida; BA, Economics, 2007
Other experience and qualifications relevant to the proposed Project:
<p>-Large projects include Louisiana Department of Education, EANS Grant Administration and ESSER Federal Reporting where Liana led a team that designed and implemented program policies, applicant management system(s), applicant communications and engagement processes, and applicant training and resource tools. As part of the program, the team performed intake, review, and quality control checks on applications and relevant documentation for both the phases of program applications and supported client with reporting needs and developed tools to create reports for Federal requirements and deadlines.</p> <p>-Other projects include Construction Cost Monitoring where the firm was engaged by an Owner to monitor and review pay applications from general contractor of a commercial project and issue monthly reports to the owner throughout the project lifecycle.</p> <p>-She has served as a project lead and/or project manager on various projects to drive production, schedule, and budget against project goals.</p>

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
Randy LeBeau Director
Name of Firm with which associated:
EAG Gulf Coast, LLC
Description of job responsibilities:
Director of outsourced accounting services.
Years' experience with this Firm:
3
Education: Degree(s)/Year/Specialization:
Southeastern Louisiana University, 2003, BS, Finance 2013, BS, Accounting
Other experience and qualifications relevant to the proposed Project:
Randy has a comprehensive understanding of multi entity GAAP requirements, internal control standards, GASB governmental practices, State and Federal compliance reporting, Contractual Government aviation compliance, ILOTA trust account management, treasury cash flow management and large project implementations.

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>City of New Orleans</p> <p><i>Please see proposal for a table of our references.</i></p>	<p>Audit, Single Audit, and Statewide Agreed-Upon Procedures</p>
Length of Services Provided:	Cost of Services Provided:
<p>13 years</p>	<p>\$400,000 approx. annual fee (Audit only)</p>

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Jefferson Parish</p> <p><i>Please see proposal for a table of our references.</i></p>	<p>Audit, Single Audit, and Statewide Agreed-Upon Procedures</p>
Length of Services Provided:	Cost of Services Provided:
<p>2 years - Postlethwaite & Netterville Over 20 years - Carr, Riggs & Ingram and Rebowe & Company, CPAs</p>	<p>\$159,000 approx. annual fee (Audit only)</p>

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
St. Bernard Parish Government	Audit, Single Audit, and Statewide Agreed-Upon Procedures
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
2 years	\$97,000 approx. annual fee (Audit only)

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
St. John the Baptist Parish	Audit, Single Audit, and Statewide Agreed-Upon Procedures
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
1 year	\$100,000 approx. annual fee (Audit only)

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Red River Parish	Audit, Single Audit, and Statewide Agreed-Upon Procedures
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
3 years	\$49,500 approx. annual fee (Audit only)

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
City of Harahan	Audit, Single Audit, and Statewide Agreed-Upon Procedures
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
3 years	\$41,500 approx. annual fee (Audit only)

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>The Consolidated Government of the City of Baton Rouge and Parish of East Baton Rouge, Louisiana</p> <p><i>Please see proposal for a table of our references.</i></p>	<p>Audit, Single Audit, and Statewide Agreed-Upon Procedures</p>
Length of Services Provided:	Cost of Services Provided:
<p>21 years</p>	<p>\$257,000 approx. annual fee (Audit only)</p>

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
City of Mandeville	Audit, Single Audit, and Statewide Agreed-Upon Procedures
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
6 years	\$40,000 approx. annual fee (Audit only)

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Louisiana Office of Community Development	Waste and Water Rate Studies
<i>Please see proposal for a table of our references</i>	
Length of Services Provided:	Cost of Services Provided:
About 1 year	\$750,000

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
East Jefferson General Hospital Pension Plans	Audits
<i>Please see proposal for a table of our references.</i>	
Length of Services Provided:	Cost of Services Provided:
8 years	\$15,000 approx. annual fee (Audit only)

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. N/A	N/A	N/A
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

EisnerAmper appreciates the opportunity to propose to provide services to Jefferson Parish. We have prepared a proposal for you in addition to this document where you can find additional information and the firm's qualifications for the proposed project.

EisnerAmper has and currently serves as the Parish's annual auditor for purposes of complying with the Louisiana state audit law and must maintain independence from the Parish. As such, our firm undergoes a thorough vetting process to ensure that additional non-audit services, such as those proposed within this offering, do not impair our independence.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature: Fred W. Smith Print Name: Freddy Smith

Title: Partner Date: October 3, 2024