

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:

Resolution No. 140314

SOQ-22-048 Auditor for the West Jefferson General Hospital Retirement Plan

B. Firm Name & Address:

Postlethwaite & Netterville, APAC
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:

Don McLean, CPA
Director, Postlethwaite & Netterville, APAC
8550 United Plaza Blvd., Suite 1001
Baton Rouge, LA 70809
djmclean@pncpa.com
(225) 408-4404

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

Postlethwaite & Netterville, APAC
One Galleria Blvd., Suite 2100
Metairie, LA 70001

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.

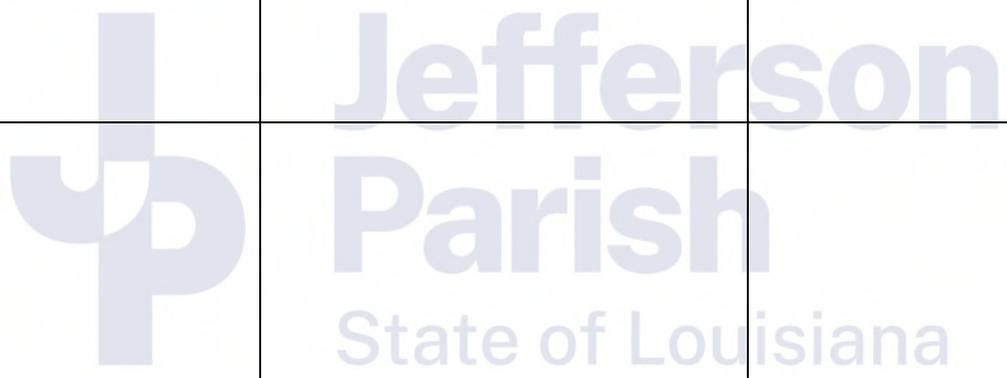
2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, 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	N/A	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>6</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:
Don McLean, CPA Director
Name of Firm with which associated:
Postlethwaite & Netterville, APAC
Description of job responsibilities:
As the Engagement Director for the WJMC Retirement Plan audit, Don will exercise overall control of the audit, ensure quality and timeliness of deliverables and provide communication with management as to the audit's progress.
Years' experience with this Firm:
7 years
Education: Degree(s)/Year/Specialization:
Bachelor of Science/1990/Accounting/Louisiana State University
Other experience and qualifications relevant to the proposed Project:
As a Director, Don is responsible for planning and supervising financial statement audits, agreed-upon procedures, and regulatory compliance testing for a variety of clients. Don's governmental experience includes auditing or providing accounting services to cities, school boards, public utilities, parishes, universities, state government, and retirement systems. Don was the previous Engagement Director for the WJMC Retirement Plan audit from 2020-2021. Don has over 20 years of experience in governmental accounting and assurance.

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PROFESSIONAL NO. 2
Name & Title:
Philip Rebowe, CPA, CFE, CCA Director
Name of Firm with which associated:
Postlethwaite & Netterville, APAC
Description of job responsibilities:
As Client Service Director for the Retirement Plan audit for WJMC, Philip will be your 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 WJMC's service needs are being met and will set a tone of excellent service that fits the needs of WJMC.
Years' experience with this Firm:
2 years
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. As such, he brings substantial experience and knowledge of Jefferson Parish's finances and its financial management system.

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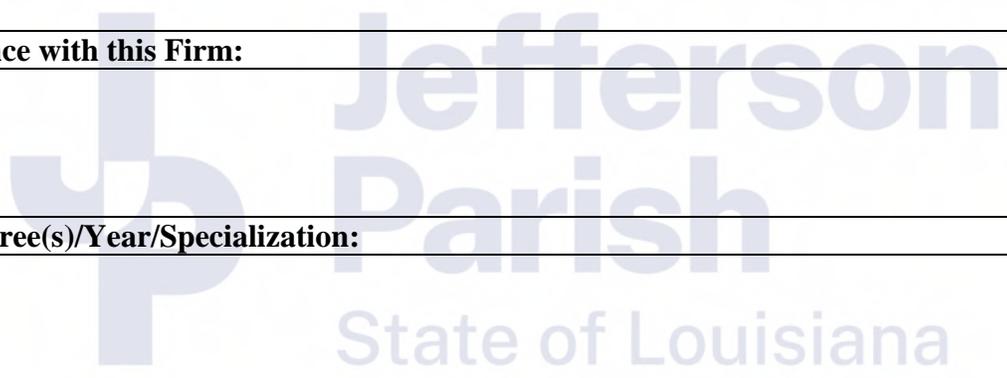
PROFESSIONAL NO. 3
Name & Title:
Tiffani Dorsa, CPA Director
Name of Firm with which associated:
Postlethwaite & Netterville, APAC
Description of job responsibilities:
As the Second Review Director, Tiffani will serve in an advisory capacity to the Engagement Director in compliance and accounting matters and will provide concurring sign off.
Years' experience with this Firm:
18 years
Education: Degree(s)/Year/Specialization:
Bachelor of Science/1994/Accounting/University of New Orleans
Other experience and qualifications relevant to the proposed Project:
<p>Tiffani works exclusively within the governmental and non-profit industries. Her experience includes entities with large investment portfolios and others that receive federal and state assistance. In addition, she is intricately knowledgeable of Governmental Auditing Standards, as well as state regulations as it applies to governmental entities and quasi-public organizations.</p> <p>Tiffani has instructed several governmental trainings covering updates from the Governmental Standards Board and Uniform Guidance compliance requirements. Tiffani has attended numerous local and national governmental and non-profit conferences ensuring she is current with the latest accounting principles and auditing standards applicable to governmental and non-profit audits.</p> <p>Additionally, Tiffani has served as a leader in developing the firm's process for performing the LLA statewide agreed-upon procedures.</p>

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PROFESSIONAL NO. 4
Name & Title:
Courtney Robertson, CPA Manager
Name of Firm with which associated:
Postlethwaite & Netterville, APAC
Description of job responsibilities:
As the Manager for WJMC's engagement, Courtney will execute the audit plan and exercise overall field supervision.
Years' experience with this Firm:
6 years
Education: Degree(s)/Year/Specialization:
<ul style="list-style-type: none">• Bachelor of Science, Accounting, Southeastern Louisiana University (2015)• Master of Science, Accounting, Louisiana State University (2016)
Other experience and qualifications relevant to the proposed Project:
<p>With over five years of experience, Courtney is focused on providing assurance services to governmental pension plans, financial institutions, governmental entities, not-for-profits and employee benefit plans. Courtney is responsible for various aspects of the audit engagement, including planning, evaluation of internal control systems, substantive audit testing, supervision of team members assigned to the engagement, and preparation of financial statements and note disclosures.</p> <p>Courtney attends internal, local and national conferences and training to ensure she is current with the latest accounting principles and auditing standards impacting the industries she serves.</p>

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PROFESSIONAL NO. 5
Name & Title:
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:



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:
City of Baton Rouge/Parish of East Baton Rouge Employees' Retirement System	Financial Statement Audit, Statewide Agreed Upon Procedures, Audit of Employer Schedules
Length of Services Provided:	Cost of Services Provided:
21 years	\$57,500 (most recent year)

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
East Jefferson General Hospital Retirement Plan Tim Palmatier, JD, CPE Director of Finance 200 Derbigny Street, Ste 4200 Gretna, LA 70053	Audit
Length of Services Provided:	Cost of Services Provided:
2009 - 2014 & 2021	\$117,750 & 21,750

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PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Firefighters Pension and Relief Fund of the City of New Orleans	Audit and Statewide Agreed Upon Procedures
Length of Services Provided:	Cost of Services Provided:
5 years	\$45,000 (most recent year) \$205,000 (total)

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Police Pension Fund of the City of New Orleans	Audit and Statewide Agreed Upon Procedures
Length of Services Provided:	Cost of Services Provided:
5 years	\$14,000 (most recent year) \$56,000 (total)

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PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Sewerage and Water Board of New Orleans - Single Employee Retirement System	Audit
Length of Services Provided:	Cost of Services Provided:
20 years	The retirement plan audit is included in the fee of the audit of the entire entity. The estimated portion of the total fee related to the retirement plan is \$20,000 for the most recent year.

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
West Jefferson Medical Center Savings and Retirement System	Audit
Length of Services Provided:	Cost of Services Provided:
2010 - 2015	\$67,000 total

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PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Retirement Plan for Employees of West Jefferson Medical Center	Audit
Length of Services Provided:	Cost of Services Provided:
2020 - 2021	\$30,800 total

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Louisiana State Employees' Retirement System (LASERS)	Financial Statement Audit, Pension Schedules Audit
Length of Services Provided:	Cost of Services Provided:
5 years	\$82,177

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PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish Finance Authority	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2000-2015	\$564,400 (total)

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish Hospital Service District No. 1	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2006-2015	\$779,750 (total)

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PROJECT NO. 11	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2020-2021	\$178,000

PROJECT NO. 12	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish Public School System	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2020-2022 (in process)	\$280,000 (total fees for periods served)

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PROJECT NO. 13	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish Juvenile Court	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2010-2017	\$210,250

PROJECT NO. 14	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish Judicial Expense Funds	Assurance Services
Length of Services Provided:	Cost of Services Provided:
2020-2021	\$48,000

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.

P&N has an understanding of the specialized audit requirements of governmental entities, retirement plans, the State of Louisiana Legislative Audit, and the State of Louisiana. We offer a Jefferson Parish-based engagement team with significant experience in the governmental environment and employee benefit plan arena. In fact, we have over 80 professionals with governmental experience and more than 50 employee benefit plan auditors. Our diversified client base includes over 80 governmental entities and more than 180 benefit plans ranging in size. Additionally, P&N demonstrates our commitment to providing quality audits through voluntary membership in the AICPA Governmental Audit Quality Center (GAQC) and the Employee Benefit Plan Audit Quality Center (EBP Center). Please refer to our accompanying Statement of Qualifications for additional information.

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

Signature: Don McLean **Print Name:** Don McLean

Title: Director **Date:** 09/22/2022