



RFQ ADDENDUM #1
Solicitation No. PBCHA-RFP-2026-09

DATE: April 7, 2026
TO: All Prospective Respondents
RE: **Request for Proposals for Audit Services**

The following additions and/or modifications to the Request for Proposals (RFP) posted to PBCHA website and DemandStar website, on March 30, 2026, and will become part of the Audit Services. The RFP closing date will remain the same Tuesday, May 12, 2026, at 2:00 p.m.

- 1. Pre-proposal Meeting Minutes Transcript

Every effort will be made to maintain this schedule. However, all dates are subject to change if it is deemed to be in the best interest of PBCHA.

Sincerely,

LaQuavial Pace
Contracts and Procurement Manager

Return of this Addendum is not mandatory; however, the Respondent is responsible for its contents and is requested to sign and submit this Addendum with its response to the RFP.

ACKNOWLEDGED:

For: _____
(Company Name)

By: _____

Date: _____



PRE-PROPOSAL CONFERENCE MEETING MINUTES

1. The pre-proposal conference was held on Tuesday, April 7, 2026, at 9:00 a.m. at 3333 Forest Hill Blvd., West Palm Beach, FL 33406 and via Zoom.
2. All proposals are due on May 12, 2026, at 2:00 p.m. Please include signed addendums with your proposal submittal. We will not accept late proposals.
3. Contract Terms. The term of this contract is for three (3) years with (2) two (1) year renewal option at the sole discretion of Palm Beach County Housing Authority (PBCHA).
4. Purpose. Ms. Pace provided a complete overview of the purpose of this pre-proposal conference. The Palm Beach County Housing Authority is soliciting written proposals from qualified, licensed, and insured firm(s) to perform Audit Services for PBCHA and its affiliates.
5. Background. Ms. Pace provided a brief overview of the purpose of the agency's background.
6. Scope of Work. Please review this section in its entirety. All work shall comply with the conditions set forth in the Scope of Work.
7. Reservation of Rights. Please review this section in its entirety. The PBCHA reserves the right to reject and not consider any proposal(s) of which communication between a Respondent and a member of the PBCHA staff, its Resident or Board of Commissioners (BOC).
8. General Term and Conditions. Please review this section in its entirety.
9. Debarment Status. Please read this section in its entirety. By submitting a response to this proposal, you are certifying that you are not currently on the HUD debarment or suspension list.
10. Payment. Please read this section in its entirety. PBCHA is a net 30 company which means your firm will be paid within 30 days of receipt of the invoice to the Accounting Department. PBCHA may take a 2% discount from an invoice if payment can be made within ten (10) days from receipt of a valid invoice.
11. Renewal of Contract. Please read this section in its entirety. If the PBCHA elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by more than the percentage increase/decrease of the CPI-U section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
12. Termination for Cause and Termination for Convenience. Please read this section in its entirety.
13. Insurance. The PBCHA has a minimum insurance requirement that all awarded contractors must carry during the life of the contract. When submitting your bid please provide proof of insurance by submitting COI that shows active coverage.



14. Drug-Free and Smoke-Free Workplace. The PBCHA is a drug-free and smoke-free campus. Please read this section in its entirety.

15. Personnel. All personnel should be in company uniform and must sign in when arriving at PBCHA property.

16. Submission Instructions and Format of Proposal. Please read this section in its entirety,

Request for Proposals No. PBCHA-RFP-2026-09

Closing Date: May 12, 2026; 2:00 PM

Title: Audit Services

Firm Name and Offeror's Authorized Contact Person: _____

Telephone number of Contact Person: _____

Name of Procurement Officer: LaQuavial Pace, Contracts and Procurement Manager

One (1) original copy with Five (5) copies must be submitted in sealed envelope clearly marked with USB drive.

17. Oral Presentation. Please read this section in its entirety. Oral presentation maybe required for clarification or elaborate on the proposal submitted.

18. Evaluation Criteria. Please follow the evaluation criteria when responding to this proposal. If your response follow the evaluation criteria it will increase your chances of getting the maximum allocated points. Failure to meet the threshold requirements of 70%/+ may result in rejection of the proposal.

19. Negotiation and Award. Please read this section in its entirety. PBCHA will negotiation a best and final offer for services.

20. Confidential Material. Please read this section in its entirety. Any confidential material submitted by a Respondent must be clearly marked as such.

21. Financial Statements. Please read this section in its entirety. The Respondent may be requested to submit current audited financial statements. Furthermore, the Respondent shall disclose any past or current litigation to which it is a party and the amount in controversy or potential liability.

22. Incurring Cost. Please read this section in its entirety. Contractors must meet all minimum qualifications to be considered responsive. Please read this section in its entirety.

23. Licensing Requirement. Please read this section in its entirety.

24. Attachments. The PBCHA asks that you submit all attachments with your proposal. This includes page 2 of the solicitation package. Where there are no signature requirements, we ask that you initial and date the bottom of the last page of the document to confirm you have read and agree to the terms and conditions. All attachments are to be completed in its entirety, initialed, and signed.

Quick recap

The Palm Beach County Housing Authority held a pre-proposal conference to discuss the procurement of Audit Services for a three-year contract with two one-year renewal options. Laquavia Pace, the Contract and Procurement Manager, led the meeting and provided a detailed overview of the solicitation process, including key requirements, evaluation criteria, and submission instructions. The Authority emphasized the importance of following specific guidelines for proposal submissions, including labeling requirements and using UPS or FedEx for delivery. Participants were reminded to email any questions they might have, as further communication would be limited to written requests only. No questions or concerns were raised during the meeting, and attendees were informed they would receive copies of the meeting minutes.

Next steps

- All proposer firms: Submit questions related to the solicitation via email to the Procurement department, including solicitation number, 5 days prior to the closing date.
- All proposer firms: Submit one original, five copies, and a digital copy (flash drive) of the proposal, clearly marked with solicitation name and number, to Laquavia Pace by May 12th before 2 o'clock.
- All proposer firms: Ensure all required attachments are completed, initialed, and dated as specified in the proposal requirements.
- All proposer firms: Provide proof of insurance upon contract award (not before).
- All proposer firms: Ensure personnel assigned to audits comply with uniform/ID and drug-free/smoke-free workplace policies when on site.
- Palm Beach County Housing Authority Procurement: Send one addendum containing responses to all questions received 5 days prior to the closing date to all proposers.
- Palm Beach County Housing Authority: Send meeting minutes to all attendees, including late arrivals (e.g., Thomas Putman from CLA).

Summary

I. PBCHA Meeting Start

Palm Beach County Housing authority opened the meeting at 11 o'clock and informed participants that it would be recorded for transcription purposes only.

II. Audit Services Procurement

The meeting focused on the procurement of audit services for Palm Beach County Housing Authority. Laquavia Pace, the Contract and Procurement Manager, outlined the solicitation for qualified firms of certified public accountants to audit annual financial statements over a three-year period ending September 30, 2028, with an option for a two-year renewal. The Housing Authority was introduced as a special district in Florida, governed by a board of commissioners and responsible for managing 700 units.



III. Palm Beach Housing Programs Overview

Palm provided an overview of Palm Beach County Housing Authority's programs and services, including low-income public housing, affordable housing, tax credit, CDBG, and HCV vouchers. They emphasized the importance of reviewing the Scope of Service document in its entirety and highlighted key sections, including reservation of rights, communication protocols, and debarment requirements. Palm also outlined general terms and conditions, including payment terms, conflict of interest policies, and the retention of proposals for 60 days before disposal.

IV. Palm Beach County Contract Guidelines

Palm discussed the pre-proposal conference process, advising respondents to email questions with specific solicitation details and noting a 5-day deadline before closing. Palm emphasized the importance of marking confidential materials clearly and separately from main submissions due to Florida's record request laws. The discussion covered financial statement requirements, which would only be requested if there's concern about liability or the firm's ability to fulfill services, and clarified that Palm Beach County Housing Authority is not responsible for any costs incurred by respondents before the notice to proceed.

V. Pre-Proposal Conference Meeting Summary

Palm conducted a pre-proposal conference and instructed attendees to review and initial attachments without signature lines to acknowledge understanding of HUD general terms and conditions. No questions or concerns were raised by Becky, Jonathan, Gaby, or Thomas Putman from CLA, who joined late due to a mix-up with the invitation link. Palm confirmed that meeting minutes would be distributed to all participants and the conference was adjourned.

Meeting Attendees

Becky Sabetsky, Berman Hopkins
Samantha Souto, Berman Hopkins
Gaby Miller, CLA
Thomas Putman, CLA
Jonathan Kearney, Isler Northwest LLC
LaQuavial Pace, PBCHA Contracts and Procurement Manager
James Kijek, PBCHA Director of Procurement
Tad Fuller, PBCHA Chief Financial Officer