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Miami-Dade County, FL Continuing Professional Education for Auditing Professionals RFQ No. 909

SCOPE OF SERVICES

2.1 Background

Miami-Dade County (the County), is seeking the services of qualified firms to provide continuing professional education to auditing staff tailored to the organization and public sector operating environment.

2.2 Objective

The objective of this solicitation is to establish a Pool of pre-qualified firms with applicable expertise to provide continuing professional audit training services to the County's Audit and Management Service (AMS) Department. It is the County's intention, through this RFQ, to create a Pool which will consist of up to six firms. The training shall focus on performance auditing, operational auditing, audit planning & management, fraud detection and control, continuous auditing, network security issues, Information Technology (IT) auditing, report writing, audit evidence, work paper documentation and related topics as required. The training shall be held in Miami, Florida and shall include interactive classroom sessions incorporating lectures, public sector case studies, and/or exercises to reinforce concepts to student attendees.

2.3 Minimum Qualification Requirements

The Proposer shall be approved and registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of Continuing Professional Education (CPE), and a member of the National Registry of CPE sponsors, at the time of proposal due date. (Note: This is a continuing condition of award.)

2.4 General Training Requirements

1. The selected Proposer(s) shall provide continuing professional education training for up to fifty (50) professional audit staff members tailored to the organization and public sector operating environment. Areas of focus will be as follows:
 - Planning and Management Skills (2 days) – accomplishing high-quality audits in less time; communicating audit findings in a manner that results in corrective action and improves quality, cost and integrity; motivating staff to carry-out assignments effectively and economically.
 - Fraud Awareness (1 day) – strengthen the auditor's ability to recognize the indicators of bribes, kickbacks and payoffs in the procurement area, and collection of evidence that they may have occurred.
 - Continuous Auditing (1 day) – introductory concepts of auditing, how to implement them, and the required conditions from an audit, client, and technology perspective.
 - Audit Evidence and Work Paper Documentation (1 day) – Efficiently collecting and recording sufficient, competent evidential matter without over-documenting the audit work.

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- Network Security Essentials (3 days) - Reviewing the basics of LANs, WANs, client/server, and other forms of distributed computing architectures. Survey the security features of network operating systems, interconnection devices, remote access methods, and add-on security product
- 2. Additional areas of focus for continuing professional educational training during the term of the contract will be determined by the County as needed.
- 3. The selected Proposer(s) shall work with AMS to tailor course content and ensure delivery for optimum effectiveness.
- 4. Training dates will be established through mutual agreement between AMS and the selected Proposer(s).
- 5. The selected Proposer(s) shall structure training in the form of interactive classroom sessions incorporating lectures, public sector case studies, and/or exercises to reinforce concepts to student attendees, and provide all reading and training materials required for successful completion of the course.
- 6. The selected Proposer shall administer all training in Miami, Florida, with the facility provided by AMS.
- 7. All courses shall be NASBA approved.

2.5 Structure of Pool

The selected Proposer(s) must maintain the qualifications of the Proposer and proposed key personnel at a standard consistent with, and equivalent to, the qualification submissions submitted in response to this Solicitation. Membership in the Pool is a prerequisite for having an opportunity to obtain work through this Pool. Selection into the Pool does not guarantee work and does not provide for exclusive rights to these services for the County.

The selected Proposer(s) shall sign an agreement with the County in order to be accepted into the Pool. The agreement (refer to Section 5.0) includes general legal and administrative provisions, and may be updated periodically to reflect new County requirements. The agreement will be supplemented, upon project award, by individual Work Orders. The agreement signed for membership into the Pool and an executed Work Order, as well as, any amendments made thereto, shall collectively constitute the contract.

2.6 Work Order Assignments

The County will generally assign work based on the qualifications of the Pool member for each specific training course and the County's needs. The County may choose a selected Proposer(s) course from their catalog or work with a selected Proposer to create a course. The County reserves the right to inquire among multiple selected Proposer(s) regarding their available courses and/or their ability to create a course in determining work assignment.

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The selected Proposer(s) shall provide services through Work Orders issued by the County, which will define the scope of services, deliverables, pricing and payment terms, etc. for each particular project. All work to be performed requires a Work Order issued by the County and multiple Work Orders may be issued simultaneously, depending upon the need for the services. The County may negotiate each Work Order. If the County and the recommended Pool member cannot negotiate a successful Work Order, the County may terminate negotiations and begin negotiations with other Pool members. The County, at its sole discretion, may modify, suspend, or cancel a Work Order at any time, and shall only pay for work actually performed by the selected Proposer.

2.7 Payment Schedule

The selected Proposer(s) may invoice the County upon completion of each course, unless otherwise specified in the Work Order.

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