



John E. Manning  
*District One*

August 19, 2019

(239) 533-8871

Cecil L. Pendergrass  
*District Two*

Ray Sandelli  
*District Three*

Brian Hamman  
*District Four*

Frank Mann  
*District Five*

Roger Desjarlais  
*County Manager*

Richard Wesch  
*County Attorney*

Donna Marie Collins  
*County Hearing Examiner*

Mr. Robert Ori  
Raftelis Financial Rate Consultants, Inc.  
227 West Trade Street, Suite 1400  
Charlotte, NC 28202

SUBJECT: RFP160330DLK C-7662

ENCLOSURE: CHANGE ORDER NO. 3

Dear Mr. Ori:

Enclosed is your executed copy of Change Order No. 3 for the contract RFP160330DLK Public Utilities Financial Rate Consultants C-7662

The new expiration date is 1/23/2021.

If you should have any questions, please give me a call.

Sincerely,

*Kimberly Urban*

Kimberly Urban  
Contracts Analyst  
Procurement Management Division

c: [FinanceOnBase@leeclerk.org](mailto:FinanceOnBase@leeclerk.org)  
Project File



Lee County Professional Service/Service Provider Agreement  
Change Order/Supplemental Task Authorization

Date Jul 22, 2019

**Print Form**

Change Order Agreement #: 3       Supplemental Task Authorization #: \_\_\_\_\_

A Change Order or Supplemental Task Authorization requires approval by the Department Director for expenditures under \$50,000 or approval by the County Manager for expenditures between \$50,000.01 and \$100,000 or approval by the Board of County Commissioners for expenditures over \$100,000

Primary Contact: Robert Ori

Contract Name: Public Utilities Financial Rate Consultant

Project Name: \_\_\_\_\_

Consultant: Raftelis Financial Consultants, Inc.      Project #: N/A

Solicitation #: RFP160330DLK      Contract #: 7662      Account #: N/A

Lee County Project Manager: \_\_\_\_\_      Request Date: Jul 22, 2019

Fiscal Staff: Rich Kolk

Upon the completion and execution of this Change Order or Supplemental task Authorization by both parties the Consultant / Provider is authorized to and shall proceed with the following exhibits:

- CO-STA Exhibit A - SCOPE OF PROFESSIONAL SERVICE
- CO-STA Exhibit B - COMPENSATION & METHOD OF PAYMENT
- CO-STA Exhibit C - TIME & SCHEDULE OF PERFORMANCE
- CO-STA Exhibit D - CONSULTANTS/PROVIDERS ASSOCIATED SUB-CONSULTANT(S)/SUB-CONTRACTORS
- CO-STA Exhibit E - PROJECT GUIDELINES AND CRITERIA

It is understood and agreed that the acceptance of this modification by the CONSULTANT/PROVIDER constitutes an accord and satisfaction.

Robert J. Ori  
Authorized Signature (Print Name)

July 22, 2019  
Date Accepted

Rori@Raftelis.com  
Contact E-mail Address

407-628-2600  
Contact Phone Number

**Lee County Board of County Commissioners - Procurement Management**  
1500 Monroe Street - 4th Floor - Fort Myers, FL 33901  
PO Box 398 - Fort Myers, FL 33902-0398  
Phone: (239) 533-8881



Date Jul 19, 2019

**Print Form**

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Choose one of the following:

Change Order Agreement #: 3  Supplemental Task Authorization #: \_\_\_\_\_

Scope of Professional Services for:

Public Utilities Financial Rate Consultant

**Section 1.00 Changes to Professional Services**

The 'Scope of Professional Services' as set forth in Exhibit 'A' of the Professional Services Agreement, or Service Provider, referred to hereinbefore is hereby supplemented, changed or authorized, so that the Consultant or Service Provider shall provide and perform the following professional services, tasks, or work as a supplement to, change to, or authorized to, the scope of services previously agreed to and authorized.

No changes in scope, this is for renewal of term 1/24/20 - 1/23/21.



