

CLIENT SUCCESS STORY:

Clerk of Works and Review of Remediation Invoicing

Client: Insurance Carrier

Industry: Nonprofit / Historical Preservation

BACKGROUND:

Meaden & Moore was engaged to support an insurance adjuster representing a regional historical society's collection after a fire damaged the building's basement in late 2023. Although the flames were contained to the basement, smoke and soot were drawn into the HVAC system and dispersed throughout the upper levels of the library.

The affected areas included rare and fragile historical items—books, maps, and other donated materials. Many of these items were one-of-a-kind and required specialized care. Our role was to support the remediation process by documenting, validating, and reconciling restoration efforts to ensure the insurer had a clear understanding of the scope and financial impact.

OBJECTIVE

Meaden & Moore was retained to assist in the remediation and recovery process by providing on-site monitoring, gathering supporting documentation (such as timesheets and equipment counts), and verifying that invoicing was accurate and free of duplication.

AT A GLANCE

Challenges:

- On-site monitoring for a high volume of equipment and labor.
- Coordinating our resources between the library and the processing center
- Coordination between separate carriers for the building and collection.
- The long duration of the engagement, Fall 2023 - Spring 2025.

Benefits:

- **Improved Cost Control:** Real-time tracking of labor, equipment, and materials helped validate invoices and prevent overbilling.
- **Positive Claims Resolution:** Timely, evidence-based updates enabled the insurer to make quicker and more informed decisions.
- **Enhanced Accountability:** Continuous presence ensured agreed protocols and standards were followed.

THE CHALLENGE:

Though the fire was isolated to the basement, the HVAC system circulated smoke and soot throughout the library, affecting every level.

The complexity stemmed from:

- Coordinating site visits at multiple locations and site availability during recovery efforts.
- Maintaining a consistent presence requires significant time, personnel, and logistical support.
- Collecting and managing large volumes of field data (e.g., labor logs, equipment tracking).

Additionally, with separate insurance policies for the building and the collection, the financial validation needed to be segmented to avoid any duplication.

OUR APPROACH:

1. On-Site Support and Coordination

- Collaborated with the restoration firm and insurance representatives to monitor and document progress.
- Provided timely updates to the carrier based on our observations.

2. Observations and Reporting

- Conducted regular on-site visits to observe inventory handling protocols and restoration workflows.
- Documented equipment usage at both the library and the off-site processing location.
- Tracked labor deployment and headcounts to support real-time invoice review.
- Communicated field-level observations to the insurer to support timely, evidence-based decision-making.

3. Financial Reconciliation

- Validated extensive invoices and aligned costs with documented work.
- Ensured that the restoration process was transparent and defensible throughout.
- Compared our on-site observations with the invoiced quantities and amounts.

THE OUTCOME:

Meaden & Moore's field support and detailed reconciliation provided transparency and clarity to a complex recovery process. Our role helped preserve a culturally significant collection and ensured the insurer could confidently support restoration costs.

Additional Highlights:

- **Coordinated with multiple parties** to separate and track damages between the structure and the insured collection.
- **Documented all equipment on-site** at each location
- **Observed laborers** and noted **tracked daily headcounts**
- Reinforced client confidence through **responsive support and accurate financial documentation**.

RESULTS

- Delivered comprehensive documentation supporting a multi-phase recovery effort.
- Facilitated a smooth insurance claims process through accurate financial validation.
- Reinforced Meaden & Moore's ability to manage sensitive, high-stakes recovery projects.

KEY TAKEAWAYS

This case highlights Meaden & Moore's strength in Clerk of Works and Review of Remediation Invoicing. By combining financial precision with on-site engagement, we supported the recovery of irreplaceable materials and demonstrated our value in both technical analysis and real-world logistics. While we did not perform the restoration ourselves, our role was instrumental in monitoring, documenting, and validating the process to ensure financial clarity and confidence.

EXPERT PERSPECTIVE: BEN SZUSTAK ON FIELD-LEVEL INSIGHT IN CLAIMS

This case was a perfect example of how our work goes beyond the spreadsheet.

It involved boots-on-the-ground oversight, coordination with the restoration team, and a detailed review of the remediation invoicing.

Being part of that process and knowing the work we do protects pieces of history makes this job incredibly rewarding.



Benjamin S. Szustak, CPA

Manager, Investigative & Forensic Accounting

bszustak@meadenmoore.com

“Client service is about more than numbers. Whether I’m on-site during a recovery or helping reconcile costs after the fact, I focus on being responsive, reliable, and thoughtful in every detail to make the process easier for the client.”

— Ben Szustak, Manager