

Contract Award

Contract Number:	Doc1677946894
Contract Description:	Staff Augmentation
Vendor:	Deloitte Consulting

Task Order Categories Awarded:

TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support

TASK 8 – Program Performance Monitoring and Evaluation

TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation

TASK 10 – Audit Readiness and Monitoring Support

TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects

TASK 12 – Training, Technical Assistance, and Capacity Building

TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

STATE OF NORTH CAROLINA Division of Community Revitalization (DCR) Request for Best and Final Offer (BAFO)	
Refer <u>ALL</u> Inquiries regarding this to: angela.dunaway@commerce.nc.gov (919) 526-8340	Request for Best and Final Offer (BAFO) RFP #Doc1677946894 Staff Augmentation BAFO Issue Date: December 10, 2025 BAFO Response will be received until: December 12, 2025, at 5:00 pm EST
Using Agency: North Carolina Department of Commerce, Division of Community Revitalization	

NOTICE TO VENDOR:

Request for Best and Final Offer (BAFO), subject to the conditions made a part hereof, will be received at the email address angela.dunaway@commerce.nc.gov until the date and time specified above.

EXECUTION:

In compliance with this Request for Best and Final Offer, and subject to all the terms and conditions herein, those in the original Request for Proposal, and in Vendor’s offer thereto (except as noted herein), the undersigned offers and agrees to furnish any and all goods and services which are offered, at the prices agreed upon and within the time specified herein. Pursuant to GS §143-54 and §143-59.2 and under penalty of perjury, the undersigned Vendor certifies that this offer has not been arrived at collusively or otherwise in violation of Federal or North Carolina law and this offer is made without prior understanding, agreement, or connection with any firm, corporation, or person submitting an offer for the same services, and is in all respects fair and without collusion or fraud. This procurement complies with the State’s own procurement laws, rules and procedures per 2 CFR § 200.317.

Failure to sign offer prior to submittal shall render offer invalid.

COMPLETE/FORMAL NAME OF VENDOR: Deloitte & Touche LLP		
STREET ADDRESS: 621 Hillsborough Street, Suite 400	P.O. BOX: N/A	ZIP: 27603
CITY & STATE & ZIP: Raleigh, North Carolina 27603	TELEPHONE NUMBER: (512) 203-3476	TOLL FREE TEL. NO: N/A
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE : N/A		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Linus N Akanoh, jr.	FAX NUMBER: N/A	
VENDOR’S AUTHORIZED SIGNATURE:	DATE: 12/12/2025	EMAIL: lakanoh@deloitte.com

Offer valid for ninety (90) calendar days from date of opening unless otherwise stated here: _____ days.

ACCEPTANCE OF OFFER:

If the State accepts any or all parts of this offer, an authorized representative of the Department of Commerce shall affix her/his signature to the Vendor's response to this Request for BAFO. The acceptance shall include the response to this BAFO, any provisions and requirements of the original Solicitation, and the North Carolina General Terms and Conditions. These documents shall then constitute the written agreement between the parties. A copy of this acceptance will be forwarded to the successful Vendor(s).

FOR STATE USE ONLY: Offer accepted and Contract awarded this 19th day of December, 2025, as indicated on the attached certification, by Signed by: _____ (Authorized Representative of Department of Commerce).

REQUEST FOR BEST AND FINAL OFFER (BAFO):

This request is to solicit a best and final offer from Vendor regarding the Errata and Exceptions noted in its proposal.

Vendor's Errata and Exceptions

The State does not agree to the Vendor's Errata and Exceptions included in its proposal, and all Terms and Conditions remain as stated in the RFP. Should the State issue a proposed Task Order to the Vendor, the Vendor may, at that time, seek to negotiate relevant Terms and Conditions. The State will have no obligation to accept Vendor's proposed Terms and Conditions, nor will the Vendor have any obligation to accept the Task Order.

- YES, Vendor acknowledges and agrees to the above statement.
- NO, Vendor does not acknowledge or agree to the above statement.

NOTE: This Solicitation is still in the evaluation period. During this period and prior to award, possession of the BAFO, original bid response, and accompanying information is limited to personnel of the Division of Community Revitalization responsible for participating in the evaluation. Vendors who attempt to gain this privileged information, or to influence the evaluation process (i.e., assist in evaluation), will be in violation of purchasing rules and their offer will not be further evaluated or considered.



**NC DEPARTMENT
of COMMERCE**
COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

Request for Offer Extension

Solicitation Number: Doc1677946894

Solicitation Description: Staff Augmentation

Solicitation Opening Date and Time: September 11, 2025, at 2:00 pm ET

Issue Date Request for Offer Extension: December 5, 2025

Procurement Director: Angie Dunaway
angela.dunaway@commerce.nc.gov
919-526-8340

Extension Response Due Date and Time: **December 8, 2025 by 5:00 pm EST**

Return executed copy of this Request for Offer Extension via email to angela.dunaway@commerce.nc.gov by the due date and time indicated above.

Per Request for Proposal (RFP) #Doc1677946894, VALIDITY PERIOD, page 3 states, "Offer valid for at least 90 days from date of proposal opening, or if extended by mutual agreement of the parties." The State is requesting Vendor to extend its offer for thirty (30) calendar days.

- YES**, Vendor acknowledges and agrees to extend its offer thirty (30) calendar days.
- NO**, Vendor does not acknowledge and does not agree to extend its offer thirty (30) calendar days.

Sign Request for Offer Extension:

Offer (Vendor Name): Deloitte & Touche LLP

Authorized Signature: 

Name and Title: Linus N. Akanoh, Jr.

Date: December 5, 2025

Deloitte & Touche LLP

PRICING:

Vendor to replicate the table below and provide an hourly not-to-exceed rate per position for each task order category(s) offered with its solicitation response. Rates shall be inclusive of salary, overhead, administrative and other similar fees, travel and other expenses. Vendor is responsible for providing cell phones, computers/laptops, and all IT support related thereto.

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229

Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 10 – Audit Readiness and Monitoring Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$28
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229

Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133

TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt	\$8,500	\$8,755	\$9,018
Categorically Excluded Not Subject to §58.5	\$1,750	\$1,803	\$1,858
Categorically Excluded Subject to §58.5	\$3,500	\$3,605	\$3,714
Environmental Assessment	\$8,500	\$8,755	\$9,018
Environmental Impact Statements	\$500,000	\$515,000	\$530,450
Reevaluation Environmental Review:			
Exempt	\$6,800	\$7,004	\$7,215
Categorically Excluded Not Subject to §58.5	\$1,400	\$1,442	\$1,486
Categorically Excluded Subject to §58.5	\$2,800	\$2,884	\$2,971
Environmental Assessment	\$6,800	\$7,004	\$7,215
Environmental Impact Statements	\$200,000	\$206,000	\$212,180



STATE OF NORTH CAROLINA

REQUEST FOR PROPOSAL (RFP) NUMBER: Doc1677946894

Department of Commerce, Division of Community Revitalization (DCR), Staff Augmentation, Community Development Block Grant-Disaster Recovery (CDBG-DR) Expert Administrative Support

September 11, 2025 | 2:00 PM (Eastern Time)

Helping North Carolina Rebuild. Recover. Thrive.

September 11, 2025

Ms. Angela Dunaway
DCR Procurement Director
North Carolina Department of Commerce
Division of Community Revitalization
301 North Wilmington Street
Raleigh, NC 27601

Subject: Request for Proposals #: Doc1677946894

Dear Ms. Dunaway,

On behalf of Deloitte & Touche LLP (“Deloitte”¹) and the members of our service team (the Deloitte Team²), we are pleased to submit our response to the Department of Commerce Division of Community Revitalization’s (DCR or Department) Request for Proposals for the establishment of a pre-qualified vendor pool to support the administration and management of Community Development Block Grant–Disaster Recovery (CDBG-DR) initiatives in the State of North Carolina (North Carolina or State).

North Carolina urgently needs to deploy over \$1.4 billion in CDBG-DR funds to communities devastated by Hurricane Helene. This task is complicated by complex federal requirements, limited administrative capacity, and the need for transparent, equitable recovery. Deloitte, the world’s largest consulting firm, along with WSP, one of the world’s largest architecture and engineering (A&E) firms and other esteemed teaming partners, is committed to helping DCR deliver impactful, compliant, and resilient recovery programs. We believe that our unmatched combination of capacity, technical depth, and disaster recovery experience uniquely positions us to address the full spectrum of challenges facing DCR and the State, confirming that recovery efforts are both comprehensive and sustainable.

Our value proposition is rooted in a deep understanding of the current and evolving challenges DCR faces both now and in the long-term recovery journey ahead. To this end, the Deloitte Team delivers forward-thinking solutions that anticipate emerging needs and respond decisively to the objectives of your U.S. Department of Housing and Urban Development (HUD) Action Plan.

North Carolina Requires a Diverse Set of Integrated Skills and Capabilities to Effectively Execute Recovery Programs

Our team combines national leadership in program management, compliance, and grant administration with extensive knowledge and experience in housing, infrastructure, and environmental solutions. This integrated approach enables us to deliver end-to-end support—from policy development and financial management to

¹As used in this document “Deloitte” means Deloitte & Touche LLP, which provides audit and enterprise risk services; Deloitte Financial Advisory Services LLP, which provides financial advisory services. These entities are separate subsidiaries of Deloitte LLP. Deloitte & Touche LLP will be responsible for the services and the other subsidiaries may provide services pursuant to an inter-organizational transfer. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

² The “Deloitte Team” refers to Deloitte and its teaming partners AG Witt, McBride Consulting LLC, and WSP.

engineering assessments and construction oversight—confirming that all aspects of CDBG-DR programs are executed efficiently.

Widespread Damage Demands Rapid Expansion and Scalable Solutions to Reach Thousands of Households and Businesses.

Leveraging our deep bench of professionals and proven surge staffing models, we can rapidly scale resources to meet urgent needs. Our digital intake and case management platforms streamline eligibility and application processes, accelerating assistance to impacted households and businesses while maintaining accuracy and transparency.

Navigating Complex Federal Requirements and Facilitating Compliance Across Multiple Programs and Funding Streams.

Deloitte’s compliance specialists have guided states through billions in disaster recovery funding, minimizing audit risk and supporting adherence to HUD, Federal Emergency Management Agency (FEMA), and state regulations. Our real-time monitoring and reporting tools provide DCR with confidence that funding is tracked, documented, and used for grant purposes.

Delivering Transparent, Equitable, and Accountable Recovery for Diverse Communities.

We embed equity and transparency into each phase of program delivery, using advanced analytics to identify gaps and confirm that resources reach vulnerable populations. Our stakeholder engagement strategies foster trust and collaboration with local communities, tribal entities, and small businesses.

Building Local Capacity for Long-Term Resilience and Sustainable Recovery.

Our approach prioritizes workforce development and knowledge transfer, empowering North Carolina’s agencies and communities to manage future recovery efforts independently, without reliance on Federal programs. By investing in training, we help build the foundation for ongoing resilience.

Our proposal reflects our commitment to collaboration, operational excellence, and continuous improvement. However, we believe that certain provisions of the Solicitation and contract terms should be clarified or modified for this engagement. Our proposal is submitted with the understanding that Deloitte and the Department will work together to reach a mutually agreeable contract for the proposed services. We are confident in our ability to reach an agreement and, if awarded, will negotiate in good faith to finalize terms expeditiously.

Our proposed team is personally committed to making your business needs our priority. We believe that open communication is important to a successful engagement. Should you or the evaluation committee have any questions about our proposal, please contact me directly at (512) 203-3476 or lakanoh@deloitte.com. We look forward to building on our existing trusted relationships and supporting North Carolina’s recovery and future resilience.

Sincerely,



Linus Akanoh, Jr.
Principal

A photograph of two men working with wood debris. The man in the foreground is wearing a grey t-shirt, a black cap, and blue gloves, and is focused on a piece of wood. The man in the background is wearing a blue t-shirt and a white cap. The scene is outdoors with a blurred background of trees and a building.

Section 1:

Title Page

1.0 Title Page

State of North Carolina

Department of Commerce

Division of Community Revitalization (DCR)

Staff Augmentation – Community Development Block Grant – Disaster Recovery (CDBG-DR)

Expert Administrative Support

RFP Doc1677946894:

Staff Augmentation – Community Development Block Grant – Disaster Recovery (CDBG-DR)

Expert Administrative Support

Per the RFP instructions, this quote is valid for 90 days from the date of submission

September 11, 2025

Submitted by:

Deloitte & Touche LLP

621 Hillsborough Street

Suite 400

Raleigh, NC 27603

Tel. +1 (919) 546-8000

Technical Point of Contact and Authorized Representative:

Linus Akanoh Jr.

Principal

Tel. +1 (512) 203-3476

Email: lakanoh@deloitte.com

Contracts POC:

Georgina Ascencio

Contracts Administrator

Tel. +1 (305) 808-2584

Email: geascencio@deloitte.com

Disclosure: No actual or potential conflicts of interest involving Deloitte or its key personnel exist at the time of submission.

A man in a grey t-shirt and black cap is working with wood debris. He is wearing blue gloves and a watch. In the background, another man in a blue t-shirt and white cap is also working with wood debris. The scene is outdoors, likely at a construction or demolition site.

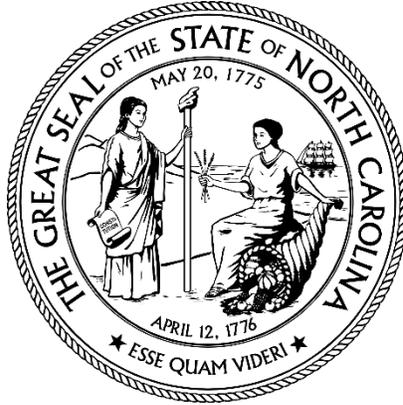
Section 2:

Signed Execution Pages and signed Addenda

2.0: Signed Execution Pages and Signed Addenda

2.1 RFP, including Signed Execution Pages

The Department of Commerce, Division of Community Revitalization Request for Proposals #: Doc1677946894 for Staff Augmentation Community Development Block Grant-Disaster Recovery Expert Administrative Support Services (released on August 11, 2025) is provided below. The populated attachments can be found in Section 6: Examples (Attachment H) and Section 7: Attachments of this response.



**STATE OF NORTH CAROLINA
DEPARTMENT OF COMMERCE
Division of Community Revitalization**

Request for Proposals #: Doc1677946894

Staff Augmentation

**Community Development Block Grant-Disaster Recovery
Expert Administrative Support**

Date of Issue: August 11, 2025

Proposal Opening Date: September 4, 2025, at 2:00 PM ET

Direct all inquiries concerning this RFP to:

Angie Dunaway
DCR Procurement Director
angela.dunaway@commerce.nc.gov
919-526-8340

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1.0 PURPOSE AND BACKGROUND – AGENCY SPECIFIC TERM CONTRACT

The Department of Commerce, Division of Community Revitalization (DCR) is looking to establish a pool of pre-qualified vendors eligible for future task orders to provide administrative, technical, programmatic, and project management support for CDBG-DR initiatives. Services will be provided on an as-needed basis, in coordination with existing State staff, and in accordance with the scope and terms outlined in this Request for Proposals (RFP). Vendors approved through this solicitation will be included in a pre-qualified vendor pool eligible to receive task orders as needs are identified. The individual task orders, combined with this RFP, the vendor’s offer in response to this RFP, and any addenda and Best and Final Offer (BAFO), will constitute the contract (see Section 2.1 below). There is no guarantee of work for any vendor that becomes pre-qualified pursuant to this RFP.

Hurricane Helene made landfall in September 2024, bringing historic rainfall, strong winds, and tornadoes that caused widespread damage across North Carolina. Thousands of homes and small businesses were damaged or destroyed. On September 27, 2024, former Governor Roy Cooper requested a Major Disaster Declaration for thirty-nine (39) counties and the Eastern Band of Cherokee Indians. The President approved the request on September 28, authorizing Individual and Public Assistance under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (P.L. 93-288) for 25 counties and the Eastern Band of Cherokee Indians. Twelve additional counties were added in the following weeks, bringing the total to 39 eligible counties.

In response to the disaster, the United States Department of Housing and Urban Development (HUD) allocated \$1,428,120,000 in Community Development Block Grant–Disaster Recovery (CDBG-DR) funds to the State of North Carolina to support long-term recovery. These funds are intended to address unmet housing, economic development, infrastructure, and mitigation needs that remain after all other assistance has been exhausted.

To manage these funds, the State established the Division of Community Revitalization (DCR) within the North Carolina Department of Commerce as the grantee agency for all Helene-related CDBG-DR awards. DCR is responsible for managing all aspects of these grants, including planning, policy development, program administration, compliance, monitoring, financial management, and grant closeout.

Programs that DCR may administer include, but are not limited to: single-family home repair, rehabilitation, and reconstruction; repair and reconstruction, small rental and multifamily housing; a business district revitalization program; infrastructure; and any other programs defined in the HUD-approved Action Plan and amendments, available at commerce.nc.gov/recovery. DCR may also receive and administer additional state and federal recovery funds. Any contract resulting from this solicitation may be used to support those funds at DCR’s discretion.

1.1 CONTRACT TERM

Vendors approved through this solicitation will be included in the pre-qualified vendor pool for an initial term of three (3) years, beginning on the date of final approval by the Department (the “Effective Date”). Vendors may be selected from this pool to perform work on an as-needed basis at any time during the approved term.

At the end of the initial three-year period, the Department may, at its sole discretion, renew the prequalified contract for up to three (3) additional one-year terms under the same conditions. Written notice of any renewal will be provided to Vendors no later than thirty (30) days before the expiration of the then-current term.

2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSALS AND TASK ORDERS

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference. DCR will issue Task Orders as needs are identified to Vendors that are pre-qualified and awarded pursuant to this RFP. The specific Task Order will contain requirements, terms, and conditions particular to that project, which are intended to supplement the requirements, terms, and conditions herein.

2.2 ePROCUREMENT FEE

This RFP does not incorporate the eProcurement fee; however, the purchase order may be issued through the eProcurement System. See Paragraph 17 of the attached Terms and Conditions as amended. General information on the eProcurement Services can be found at: <http://eprocurement.nc.gov/>.

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It is the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Vendors have questions or issues regarding any component of this RFP, those must be submitted as questions in accordance with the instructions in the RFP QUESTIONS Section. If the State determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The State may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B .0503, the State is not required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's proposal or otherwise. This applies to any language appearing in or attached to the document as part of the Vendor's proposal that purports to vary any terms and conditions or instructions herein or to render the proposal non-binding or subject to further negotiation.

The State may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon through negotiation and incorporated by way of a Best and Final Offer (BAFO). Proposed modifications must be clearly identified in the offer by listing all proposed modifications in the offer in a section titled "Errata and Exceptions."

2.4 RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. The State will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	State	August 11, 2025
Submit Written Questions	Vendor	August 18, 2025, by 5:00 pm ET
Provide Response to Questions	State	August 25, 2025
Submit Proposals	Vendor	September 4, 2025, BEFORE 2:00 pm ET (by 1:59:59)
Oral Presentation (optional)	Vendor	TBD (if needed)
Contract Award	State	As soon as possible after evaluation of offers.

2.5 RFP QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the RFP Questions process, Vendors shall submit any such questions by the “Submit Written Questions” date and time indicated in the RFP SCHEDULE Section above, unless modified by Addendum.

Written questions related to the content of this solicitation, shall be emailed to angela.dunaway@commerce.nc.gov by the date and time specified above. Vendors should enter “Vendor Name_Staff Aug_ Questions” as the subject of the email. Question submittals should include a reference to the applicable RFP section and be submitted in the format shown below:

Reference	Vendor Question
RFP Section Number and Section Title	
RFP Page Number	

Questions received prior to the submission deadline date and time, the State’s response, and any additional terms deemed necessary by the State will be posted in the form of an addendum to *the electronic Vendor Portal (eVP)*, <https://evp.nc.gov>, and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any State personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the RFP and an addendum to this RFP.

Questions or issues related to using eProcurement Sourcing must be directed to the eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET.

2.6 RFP SUBMITTAL

IMPORTANT NOTE: Late submissions, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor’s sole responsibility to ensure its proposal has been received as described in this RFP by the specified time and date of opening. The time and date of receipt will be marked on each proposal when received. Any proposal or portion thereof received after the proposal deadline will be rejected.

Offers to be submitted through eProcurement Sourcing. For training on how to use eProcurement Sourcing, <https://eprourement.nc.gov/training/vendor-training>. Questions or issues related to using eProcurement Sourcing must be directed to the eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET.

If confidential and proprietary information is included in the proposal, also submit one (1) signed, **REDACTED** copy of the proposal. Such information may include trade secrets defined by N.C. Gen. Stat. § 66-152 and other information exempted from the Public Records Act pursuant to N.C. Gen. Stat. §132- 1.2. Vendor may designate information, Products, Services or appropriate portions of its response as confidential, consistent with and to the extent permitted under the statutes and rules set forth above. By so redacting any page, or portion of a page, the Vendor warrants that it has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisors, that the portions determined to be confidential and proprietary and redacted as such, meet the requirements of the Rules and Statutes set forth above. However, under no circumstances shall price information be designated as confidential. Redacted refers to the “*blacking out*” of information so it is not visible.

If the Vendor does not provide a redacted version of the proposal with its RFP submission, the Department may release an unredacted version if a record request is received. Also, final contracts must be posted on the DCR website per HUD rules, and DCR will post the redacted version of the contract.

Critical updated information may be included in Addenda to this RFP. It is important that all Vendors responding to this RFP periodically check the State’s eVP website for any Addenda that may be issued prior to the proposal opening date. All Vendors shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

The public proposal opening will be held via Microsoft Teams. Below is the information regarding the public solicitation opening. Only Vendor names will be announced at the opening.

Date: September 4, 2025
Time: 2:00 pm ET
Virtual via Teams: [Join the meeting now](#) **CLICK the Link to Join the Meeting**
Meeting ID: 210 925 726 471 1
Passcode: HW6Ns2FS

Dial in by phone: 984-204-1487
Phone conference ID: 465 443 050#

2.7 PROPOSAL CONTENTS

Vendor shall populate all attachments of this RFP that require the Vendor to provide information and include an authorized signature where requested. Failure to provide all required items, or Vendor’s submission of incomplete items, may result in the State rejecting Vendor’s proposal, in the State’s sole discretion.

All pages of the RFP should be returned.

Proposal shall include the following components:

1. Title Page

The title page shall include:

- Vendor’s name, business address, and phone number

- Name and title of an authorized representative
- RFP number
- A disclosure of any actual or potential conflicts of interest involving the Vendor or its key personnel. If no conflicts exist, the Vendor should state that explicitly.

2. Signed Execution Pages and signed Addenda, if applicable.

3. Table of Contents

4. Narrative Response: Vendor Qualifications and Approach

This section should demonstrate the Vendor’s qualifications and capacity to support DCR through future task orders. At a minimum, it should include:

- A brief history of the organization
- Relevant experience with HUD-funded programs (e.g., CDBG-DR, CDBG-MIT, HOME, ESG) or other disaster recovery work
- The Vendor’s approach to fulfilling task orders, including how qualified personnel will be identified and assigned
- Internal systems for quality assurance, regulatory compliance, and project oversight
- A summary of staffing capacity, including the ability to scale quickly for both short-term and long-term assignments
- Clear alignment of proposed staff with the type of work to be performed

5. Resumes and Bios

Resumes or biographies must be provided for all key personnel proposed. Vendors are encouraged to submit at least two qualified candidates per position or labor category, where applicable.

6. Examples

Provide at least three examples of projects of similar type and size performed within the last five years, preferably for state and/or local government entities (see Attachment H)

2.8 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Relevant definitions for this RFP are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found below which are incorporated herein by this reference.

The following definitions, acronyms, and abbreviations are also relevant to this RFP:

- a) **ACTION PLAN:** the State’s Community Development Block Grant-Disaster Recovery (also referred to as the CDBG-DR) Funding Action Plan in Response to Hurricane Helene impacted Counties in Western North Carolina.

- b) **BAFO:** Best and Final Offer, submitted by a Vendor to alter its initial offer, made in response to a request by the issuing agency.
- c) **CDBG-DR:** Community Development Block Grant for Disaster Recovery grant.
- d) **CONTRACT LEAD:** The Procurement Contracting Officer listed in the RFP.
- e) **CONTRACT ADMINISTRATOR:** The Division of Community Revitalization program administrator.
- f) **DCR:** The North Carolina Division of Community Revitalization
- g) **DRGR:** Disaster Recovery Grant Reporting System
- h) **ePROCUREMENT SERVICE(S):** The program, system, and associated Services through which the State conducts electronic procurement.
- i) **HUD:** U.S. Department of Housing and Urban Development
- j) **OFFER:** Vendor entire response to this Solicitation, including all documents and information requested in this Solicitation.
- k) **PRINCIPAL PLACE OF BUSINESS:** The principal place from which the overall trade or business of the Vendor is directed or managed.
- l) **PROGRAM:** Division of Community Revitalization Hurricane Helene Recovery Program.
- m) **QUALIFIED PROPOSAL:** A responsive proposal submitted by a responsible Vendor.
- n) **RFP:** Request for Proposals
- o) **SERVICES or SERVICE DELIVERABLES:** The tasks and duties undertaken by the Vendor to fulfill the requirements and specifications of this solicitation.
- p) **SOLICITATION:** This RFP.
- q) **SOP:** Standard Operating Procedures
- r) **SOR:** System of Record
- s) **STATE:** The State of North Carolina, including any of its sub-units recognized under North Carolina law.
- t) **STATE AGENCY:** Any of the more than 400 sub-units within the executive branch of the State, including its departments, boards, commissions, institutions of higher education and other institutions.
- u) **TASK ORDER:** The document that will be issued for specific work to an awarded Vendor and will contain specific requirements, terms, and conditions. The Task Order will incorporate by reference the Contract resulting from this RFP.
- v) **VENDOR:** Supplier, bidder, proposer, company, firm, corporation, partnership, individual or other entity submitting a response to a Request for Proposal.

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

This RFP is to establish a pre-qualified pool of vendors that may be considered for future task orders at DCR's discretion, based on program needs.

North Carolina G.S. 143-52 provides a general list of criteria the State shall use to award contracts, as supplemented by the additional criteria herein. All award decisions shall be in the State's best interest. All qualified proposals will be evaluated, and awards will be made to the Vendors meeting the specific RFP Specifications and achieving the highest

and best final evaluation. Prospective Vendors shall not be discriminated against on the basis of any prohibited grounds as defined by Federal or State law.

While the intent of this RFP is to award a Contract to multiple Vendors, the State reserves the right to make separate awards to different Vendors for one or more Task Order types, to not award one or more Task Order types, or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to the State to do so. The State makes no guarantees as to whether awarded Vendors will receive task orders, the volume of task order, or the task order types.

The State reserves the right to waive any minor informality or technicality in proposals received.

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

While this RFP is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See Paragraph 28 of the Instructions to Vendors entitled COMMUNICATIONS BY VENDORS.

Each Vendor submitting a proposal to this RFP, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor’s office); or private entity, if the communication refers to the content of Vendor’s proposal or qualifications, the content of another Vendor’s proposal, another Vendor’s qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor’s proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (*i.e.*, the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or inquiries directed to the purchaser named in this RFP regarding requirements of the RFP (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

The State will conduct a One-Step evaluation of Proposals:

Proposals will be received as described in the RFP Submittal Section above.

All proposals must be received by the issuing agency not later than the date and time specified in the RFP SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the State reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the State.

At the date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum, the proposal from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. Only the names of offerors

and the Goods and Services offered shall be tabulated at the time of opening. Negotiation is anticipated, therefore cost and price shall become available for public inspection at the time of the award.

At their option, the evaluators may request oral presentations or discussions with any or all Vendors for clarification or to amplify the materials presented in any part of the proposal. Vendors are cautioned, however, that the evaluators are not required to request presentations or other clarification—and often do not. Therefore, all proposals should be complete and reflect the most favorable terms available from the Vendor.

Pursuant to 01 NCAC 05B .0503, the State reserves the right to negotiate with one or more vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement. Upon completion of the evaluation the State will post the award(s) to the State's eVP website under the RFP number for this solicitation.

3.4 EVALUATION CRITERIA

It is the intention of DCR to identify qualified vendors on the basis of demonstrated competence and qualification for the type of task order categories defined herein.

DCR will evaluate responsive proposals based on the following criteria, which are listed in order of importance:

1. Experience
 - a. Experience with CDBG-DR programs
 - b. Experience with relevant policies and requirements
 - c. Years of experience in the business
 - d. Examples of projects of similar type and size performed within the last five years (see Attachment H)
2. Firm Qualifications
 - a. Conformity with the specifications and ability to meet minimum requirements
 - b. Financial stability and solvency
 - i. Ability to meet short-term obligations, debts, liabilities, payroll, and expenses
 - ii. Sufficient cash flow and/or available financing from a financial institution to perform the proposed contract until receiving payment from the state
 - c. Ability and capacity to perform the work
3. Proposed Methodology and Technical Proposal
 - a. Staffing plan
 - b. How Vendor will ensure quality and timely services
 - c. How Vendor will ramp up services across the task order categories
4. Cost
 - a. Hourly rate per position per task order category

DCR will evaluate proposals using a narrative evaluation method, where it identifies strengths and weaknesses of each proposal, and it will select vendors using a Best Value evaluation methodology, which is defined in statute as the selection of vendors based on "the best trade-off between price and performance, where quality is considered an integral performance factor. The award decision is made based on multiple factors, including: total cost of ownership, meaning the cost of acquiring, operating, maintaining, and supporting a product or service over its projected lifetime; the evaluated technical merit of the vendor's proposal; the vendor's past performance; and the evaluated probability

of performing the requirements stated in the solicitation on time, with high quality, and in a manner that accomplishes the stated business objectives and maintains industry standards compliance.” N.C.G.S. § 143-135.9

DCR reserves the right to take any of the following actions: cancel this RFP if determined to be in the best interest of the state; disqualify any responses to this RFP for nonconformance to the terms described herein; negotiate with specific Vendors to achieve the best value; establish a timeline during the negotiation phase for the submission of a best and final offer; and extend the time to respond to this RFP.

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

Complete ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this RFP, the State may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the State:

- a) Total cost to the State
- b) Level of quality provided by the Vendor
- c) Process and performance capability across multiple jurisdictions
- d) Protection of the State’s information and intellectual property
- e) Availability of pertinent skills
- f) Ability to understand the State’s business requirements and internal operational culture
- g) Particular risk factors such as the security of the State’s information technology
- h) Relations with citizens and employees
- i) Contract enforcement jurisdictional issues

3.6 INTERPRETATION OF TERMS AND PHRASES

This RFP serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the State; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as “shall,” “must,” and “requirements” are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the State will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the State’s needs as described in the RFP. Except as specifically stated in the RFP, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the State exercising its discretion to reject a proposal in its entirety.

4.0 REQUIREMENTS

This Section lists the requirements related to this RFP. By submitting a proposal, the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements, and terms and conditions stated in this RFP. If a Vendor is unclear about a requirement or specification, or believes a change to a requirement would allow for the State to receive a better proposal, the Vendor is urged to submit these items in the form of a question during the question-and-answer period in accordance with the RFP Questions Section above.

4.1 TASK ORDER CATEGORIES

For each task order category that Vendor wishes to be considered Vendor proposal should demonstrate specific proof of experience and qualifications to carry out the respective task. Task Order Categories:

TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support

TASK 8 – Program Performance Monitoring and Evaluation

TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation

TASK 10 – Audit Readiness and Monitoring Support

TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects

TASK 12 – Training, Technical Assistance, and Capacity Building

TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

4.2 PRICING

In Attachment A: Pricing Vendor shall provide a not-to-exceed hourly rate for each position proposed for each task order category for which it is bidding.

4.3 PAYMENT STRUCTURE

Payment will be a fixed fee for services based on the scope of work for each task order.

4.4 INVOICES

Vendors will send monthly task order invoices to DCR.Finance@commerce.nc.gov for payment.

- a) Vendor must submit one monthly invoice within fifteen (15) calendar days following the end of each month in which work was performed pursuant to a task order.
- b) Invoices must be submitted in electronic format on the Vendor's official letterhead stationery and must be identified by a unique invoice number unless otherwise directed.
- c) Invoices must bear the correct contract number (this solicitation number), the respective task order number, and purchase order number to ensure prompt payment. Vendor's failure to include the correct purchase order number may cause delay in payment.
- d) Invoices must include an accurate description of the work for which the invoice is being submitted in DCR-approved format, the services provided, the hourly rate per position, the number of hours billed per position, the invoice date, the period of time covered, the amount of fees due to Vendor.

4.5 HUB PARTICIPATION

Pursuant to North Carolina General Statute G.S. 143-48, it is State policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this RFP will

serve to identify those Vendors that are minority owned or have a strategic plan to support the State's Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT E: HUB SUPPLEMENTAL VENDOR INFORMATION.

4.6 BACKGROUND CHECKS

Any personnel or agent of Vendor performing Services under any Contract arising from this RFP may be required to undergo a background check at the expense of the Vendor, if so requested by the State.

4.7 PERSONNEL

Vendor warrants that qualified personnel shall provide Services under this Contract in a professional manner. "Professional manner" means that the personnel performing the Services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by the State. Names of any third-party Vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor's obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).

Should the Vendor's proposal result in an award, the Vendor may be required to agree that it will not substitute key personnel assigned to the performance of the Contract, and designated in any task order, without prior written approval by the Contract Lead. Vendor may further agree that it will notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor's recommended substitute personnel. The State will approve or disapprove the requested substitution in a timely manner. The State may, in its sole discretion, terminate the Services of any person providing Services under this Contract and/or Task Order. Upon such termination, the State may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

4.8 VENDOR'S REPRESENTATIONS

If Vendor's Proposal results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the State under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor's proper performance, provision and delivery of the Service and deliverables under a resulting Contract/Task Order, or are an inherent part of or necessary sub-task included within such Service, they will be deemed to be implied by and included within the scope of the Contract/Task Order to the same extent and in the same manner as if specifically described in the Contract/Task Order. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

4.9 INSURANCE REQUIREMENTS

Insurance requirements are indicated in ATTACHEMENT C: NORTH CAROLINA GENERAL TERM AND CONDITIONS, Paragraph 15 (b)(3) Contracts valued in excess of \$1,000,000.

For the duration of any contract resulting from this Solicitation and potential Task Order, Vendor shall acquire insurance with financially sound and reputable independent insurers, in the type and amount specified in this RFP. Work on any contract/task order shall not begin until after Vendor has submitted acceptable evidence of insurance. Failure to maintain insurance coverage or acceptable alternative methods of insurance shall be deemed a breach of contract. Vendor shall submit acceptable evidence of insurance with each task order.

4.10 LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS

Federal law prohibits recipients of federal funds, whether through grants, contracts, or cooperative agreements, from using those funds to influence or attempt to influence (lobby) a federal official in connection with obtaining, extending, or modifying any federal contract, grant, loan, or cooperative agreement. Further, federal law requires that applicants for federal funds certify:

- That they abide by the above restriction;
- That they disclose any permissible (non-federal) paid lobbying on the Federal Awards being applied for; and
- That such certification requirements will also be included in any subawards meeting the applicable thresholds.

All Vendors must complete and submit ATTACHMENT F: CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS. If applicable, vendors must also submit ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES (OMB STANDARD FORM LLL) when responding to this solicitation.

4.11 FINANCIAL INFORMATION

Submitting financial information is an absolute requirement, and it is a material requirement of this RFP. Failure to submit this information shall result in the offer being deemed non-responsive, and the offer will not be considered.

If Vendor is an entity that is required to prepare audited financial statements, Vendor shall submit:

- a) Last three years of audited accrual-basis financial statements, including an income statement, cash flow statement and balance sheet;
- b) If applicable, last three years of consolidated statements for any holding companies or affiliates;
- c) An audited or un-audited accrual-basis financial statement of the most recent quarter of operation; and
- d) A full disclosure of any events, liabilities, or contingent liabilities that could affect Vendor’s financial ability to perform this contract.

If Vendor is a privately-owned entity or sole proprietorship, Vendor shall submit:

- a) Last three years of audited or un-audited accrual-basis financial statements, including an income statement, cash flow statement and balance sheet;
- b) An audited or un-audited accrual-basis financial statement of the most recent quarter of operation; and
- c) A full disclosure of any events, liabilities, or contingent liabilities that could affect Vendor’s financial ability to perform this contract.

Financial information, statements and/or documents submitted with a Proposal shall be evaluated to determine: whether the Vendor has sufficient ability to perform the Contract; whether the Vendor is able to meet its short term obligations, debts, liabilities, payroll, and expenses; whether Vendor has provided complete, reliable and accurate financial information regarding its business operation; whether the Vendor is financially solvent; and whether Vendor has sufficient cash flow and/or available financing from a financial institution to perform the proposed contract for an extended period without receiving payment from the State. Financial information of non-public entities may be marked as confidential in accordance with the Paragraph of the Instructions to Vendors entitled Confidential Information (and should be redacted in the redacted version of the offer submitted per Section 2.6).

5.0 SCOPE OF WORK

5.1 GENERAL

The North Carolina Department of Commerce, Division of Community Revitalization (DCR) is seeking Statements of Qualifications and pricing from experienced Vendors to provide administrative, technical, and programmatic support for CDBG-DR initiatives, delivered in coordination with existing State staff. Vendors must demonstrate the capabilities, expertise, and staffing necessary to fulfill the requirements outlined in this solicitation. Personnel, officers, executives, and subcontractors performing work under any contract or task order resulting from this RFP shall not be considered employees of the State. Furthermore, any resulting agreement shall not establish a joint venture, partnership, trust, agency, or any other similar business relationship between the Vendor and the State.

Vendors must clearly describe how they meet the qualifications outlined in this RFP and how they will measure performance and success in completing potential future task orders. Vendor personnel must be available to support DCR staff between the hours of 8:00 AM and 5:00 PM Eastern Time Monday through Friday. Depending on program needs, DCR may require certain roles to report in person to office space provided by the State. While DCR's main offices are based in Raleigh, NC, certain positions may require fieldwork or in-person support at intake centers in disaster-impacted areas of Western North Carolina. Intake centers are located in Asheville, Boone, and Marion, in coordination with Horne LLP, the Implementation Vendor for the Single-Family Housing Program.

DCR will utilize a System of Record (SOR) for CDBG-DR grant activities, which has not yet been finalized as of the date of this Solicitation. DCR will manage the system, and selected Vendors will be required to use the State's designated SOR. DCR may also implement separate systems for financial management and reporting. Selected Vendors may be asked to support the setup and administration of these systems.

The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs. DCR anticipates issuing task orders as priorities shift and may adjust the scope or required level of involvement accordingly.

Vendor responses should identify proposed personnel, including a description of the team structure servicing DCR, individual roles, and areas of responsibility. Proposed personnel should be clearly aligned with the specific tasks outlined in the Task Order Categories. Resumes and professional biographies must be provided for all proposed staff. Vendors must demonstrate that they have sufficient qualified personnel available to support any task orders issued under this RFP.

Vendor responses should include evidence of relevant qualifications and experience in the disciplines required by this RFP. Additional information on current and planned projects is available at: commerce.nc.gov/recovery.

By submitting a response to this RFP, Vendors affirm the following: *"The personnel included in this response are not subject to any non-competition agreement that would prevent them from accepting an offer of employment from the North Carolina Division of Community Revitalization"*.

Vendors may choose to submit an offer for all task order categories or only certain categories, as designated in Attachment A: Pricing. While Vendors may choose which task order categories, DCR makes no guarantee of any task order award, volume of task orders Vendors will receive, or the task order types Vendors will receive. Vendors must clearly state in their response to this RFP (in Attachment A) which task order category(ies) the Vendor will perform work. Task Orders will not be made outside of the task order category(ies) selected by the Vendor during this solicitation process.

5.2 TASKS / DELIVERABLES

Vendors selected for inclusion in the pre-qualified pool may be considered for task orders to perform one or more of the following service areas (categories) on an as-needed basis. Tasks may include, but are not limited to:

5.2.1 TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)

If ordered, the Vendor may assist in developing, updating, and maintaining written policies, procedures, and SOPs to support consistent, compliant administration of any DCR CDBG-DR program or effort, including but not limited to:

- Single-Family Housing Repair, Rehabilitation, and Reconstruction
- Multifamily Rental Housing Construction, Rehabilitation, and Mitigation
- Commercial District Revitalization Programs
- Community Infrastructure and Resilience Projects
- Private Roads and Bridges
- Small Rental Programs
- General administration of CDBG-DR funds

Anticipated Deliverables:

- Program-specific policies
- Program-specific SOPs detailing required workflows, documentation standards, and quality control processes
- Templates, forms, and checklists to guide eligibility determinations, benefit calculations, procurement activities, and records management
- Standardized reporting structures for HUD, state, and federal reporting requirements (e.g., DRGR, QPRs, Section 3, Fair Housing)
- Written closeout procedures outlining project completion, financial reconciliation, and grant closeout documentation

5.2.2 TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

If ordered, the Vendor may assist with developing financial management tools and providing oversight to ensure compliance with federal and state requirements.

Anticipated Deliverables:

- Written policies for fund tracking, separation of CDBG-DR funds, and proper accounting
- Fraud, waste, and abuse prevention protocols and detection tools
- Monitoring plans and tools for financial oversight of subrecipients, and contractors
- Federal and State compliance reviews, including, but not limited to, inspecting award approvals, reimbursement requests and completed monitoring visits.
- Financial performance dashboards, KPI tracking systems, and corrective action procedures

5.2.3 TASK 3 – Duplication of Benefits (DOB) Compliance

If ordered, the Vendor may assist with establishing, maintaining, and implementing DOB prevention and monitoring processes, including

Anticipated Deliverables:

- Written DOB prevention policies aligned with HUD guidance
- Data matching tools to detect and mitigate potential DOB risks
- Templates, forms, and workflows to support consistent eligibility determinations and benefit calculations
- DOB processing and compliance management

5.2.4 TASK 4 – Procurement Compliance and Monitoring

If ordered, the Vendor may assist DCR and/or subrecipients with developing procurement policies and providing oversight to ensure transparent, fair, and compliant procurement.

Anticipated Deliverables:

- Procurement policies and SOPs consistent with federal and state requirements
- Documentation standards for solicitations, contracts, procurement records, and cost reasonableness
- Monitoring tools and workflows for procurement oversight and compliance tracking

5.2.5 TASK 5 – Claims, Appeals, and Case Reviews

If ordered, the Vendor may assist with standardizing processes for managing applications, appeals, exceptions, and other case-specific requests.

Anticipated Deliverables:

- Written procedures for case reviews, escalation protocols, and decision-making workflows
- Standardized documentation tools, including review checklists, decision logs, and applicant notification templates
- Staff training materials to support consistent application of review procedures Support for audit readiness and responding to HUD, state, or other oversight inquiries related to case determinations

5.2.6 TASK 6 – Action Plan Development and Amendments

If ordered, the Vendor may assist with preparing, revising, and submitting CDBG-DR Action Plans and amendments.

Anticipated Deliverables:

- Draft Action Plan language, supporting documentation, and HUD submission packages;
- Create/maintain public comment documentation and records of stakeholder engagement.

5.2.7 TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support

If ordered, the Vendor may provide data analysis to inform program design and resource allocation.

Anticipated Deliverables:

- Unmet needs assessments, market studies, gap analyses, and resource allocation reports
- Geospatial data products, including maps, visualizations, and dashboards to support decision-making and public reporting
- Data integration from multiple sources (e.g., FEMA, SBA, NFIP, local government data) to support comprehensive needs assessments

5.2.8 TASK 8 – Program Performance Monitoring and Evaluation

If ordered, the Vendor may assist with performance tracking and program evaluation activities.

Anticipated Deliverables:

- Program-specific timelines, milestone tracking tools, and progress reporting templates
- Performance metric tracking systems and compliance monitoring tools
- Disaster Recovery Grants Reporting (DRGR) support and execution

5.2.9 TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation

If ordered, the Vendor may assist with technical assistance, monitoring, and documentation to maintain compliance with applicable requirements, including but not limited to civil rights, fair housing, labor standards, and historic preservation.

Anticipated Deliverables:

- Section 3 compliance tracking tools and reporting templates
- Fair Housing, civil rights, and Affirmatively Furthering Fair Housing documentation
- Labor standards monitoring tools, wage verification processes, and Davis-Bacon/Copeland Act compliance resources
- Documentation to support compliance with National Objectives, including LMI benefit, slum/blight prevention, or urgent need
- Historic preservation compliance documentation, including Section 106 consultation records, project review forms, coordination with the State Historic Preservation Office (SHPO), and mitigation agreements where applicable

5.2.10 TASK 10 – Audit Readiness and Monitoring Support

If ordered, the Vendor may assist with preparing for monitoring visits, audits, and corrective action implementation.

Anticipated Deliverables:

- Readiness review tools and checklists for program files, systems, and documentation
- Draft responses to monitoring reports, audit findings, or compliance inquiries
- Corrective action plans and tracking tools

5.2.11 TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects

If ordered, the Vendor may provide technical expertise to support project development, review, and compliance.

Anticipated Deliverables:

- Reviews of engineering plans prepared by subrecipients
- Review or development of cost estimates
- Review or development of feasibility studies
- Compliance assessments for infrastructure and mitigation projects
- Feasibility analysis of infrastructure, economic development, and housing projects
- Construction progress inspections of infrastructure, economic development, and housing projects

5.2.12 TASK 12 – Training, Technical Assistance, and Capacity Building

If ordered, the Vendor may provide targeted training and technical assistance to support program implementation.

Anticipated Deliverables:

- Regulatory compliance training sessions for DCR staff, subrecipients, and partners
- Updated training materials, guidance documents, and instructional resources
- Application intake support, eligibility review assistance, and program interpretation resources
- Tools to promote transparency, reporting, and accountability

5.2.13 TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support

If ordered, the Vendor may assist with developing, implementing, and overseeing relocation programs, including compliance with the Uniform Relocation Act (URA) and Optional Relation Assistance.

Anticipated Deliverables:

- Relocation policies, procedures, SOPs, and workflows

- Technical guidance to inform SOR system workflows (excluding software development)
- Application review tools for relocation eligibility and benefit determinations
- Required relocation notices, compliance monitoring tools, and corrective action resources Training materials and sessions for staff and program partners

5.2.14 TASK 14 – Communication, Public Information, and Outreach Support

If ordered, the Vendor may assist with developing and implementing communication materials, public information resources, and outreach tools to promote program awareness, transparency, and accessibility.

Anticipated Deliverables:

- Public information materials, including fact sheets, flyers, FAQs, and website content
- Standardized templates for press releases, stakeholder notices, and public updates
- Outreach materials tailored for impacted communities, including language translation and accessibility accommodations
- Guidance documents to support consistent external messaging and branding
- Communication protocols for crisis communication, public inquiries, and media responses
- Support for public meetings, stakeholder engagement, and community outreach events

5.2.15 TASK 15 – Grant Management

If ordered, the Vendor may assist with managing and implementing programs described in the State’s CDBG-DR Action Plan.

Anticipated Deliverables:

- Facilitate subrecipient contracting, compliance, and closeout activities
- Provide tools to facilitate subrecipient compliance and reporting

5.2.16 TASK 16 – Technical Systems Specification & Project Management

If ordered, the Vendor may assist with designing and detailing technical specifications for DCR’s System of Record.

Anticipated Deliverables:

- Workflow and technical specification documentation
- Project management and monitoring of the SOR

5.2.17 TASK 17 – Environmental Review

The selected Vendor(s) will perform, or cause to be performed, NEPA compliant HUD environmental reviews for projects that receive subrecipient awards under programs including infrastructure, economic revitalization, multi-family, workforce housing, and hazard mitigation set aside programs. The awarded Vendor(s) will support the responsible entity and local communities identifying the appropriate environmental review level and preparing the subsequent environmental review compliant with 24 CFR 58. Vendors must provide a unit cost price for each of the following levels of environmental review which may be necessary under these programs:

- Exempt
 - Categorically Excluded Not Subject to §58.5
 - Categorically Excluded Subject to §58.5
 - Environmental Assessment
 - Environmental Impact Statements
- Additionally, the selected Vendor(s) must provide a reevaluation cost for each of the aforementioned environmental review levels.

Anticipated Deliverables

- Environmental Review Level Identification and Environmental Review Completion Timeline
 - DCR will work with awarded subrecipients under the program and the selected Vendor(s) to determine the necessary level of environmental review and a completion timeline for the environmental review. Depending on the level of review and the scope of the project being reviewed, project timelines may be identified as subject to assumptions by the selected Vendor(s).
- Environmental Review Completion
 - Environmental reviews will be completed in compliance with the laws and authorities outlined in 24 CFR 58 and any relevant local and/or state requirements. Any and all studies required to complete the compliant environmental review are the responsibility of the selected Vendor(s).
- Reevaluation of Reviews as Necessary

When reevaluation is required for a previously completed environmental review, the Vendor is expected to provide a separate rate for reevaluation of each type/level of environmental review.

5.3 TASK ORDER METHODOLOGY

DCR will issue task orders, as the need arises, to at least two vendors qualified in that category and seek responses. The vendor will be selected based on best value to the State, considering qualifications, pricing, proposed methodology for completing the task, and total not-to-exceed amount. DCR may request and consider references for Vendors' previous work, updated financial information, litigation history, and any other information it deems relevant. Information submitted as part of this RFP should not need to be resubmitted. All task orders shall be in writing, and shall include a scope of services, a list of tasks to be performed by the Vendor, a time schedule, a list of deliverables, if any, and such other information or special conditions as may be necessary for the work requested.

5.4 TRANSITION ASSISTANCE

If the contract, or any part thereof, is not renewed or is terminated for any reason, or as part of the closeout process, the Vendor shall provide, at DCR's sole discretion, immediate and ongoing transition assistance to the new Vendor until the project (task order) is complete.

6.0 CONTRACT ADMINISTRATION

6.1 PROJECT MANAGER AND CUSTOMER SERVICE

The Vendor shall designate and make available to the State a Project Manager. The project manager shall be the State's point of contact for contract related issues and issues concerning performance, progress review, scheduling, and service. The services of the Project Manager will not be invoiced. The Project Manager will be a representative of the Vendor authorized to make decisions on its behalf.

6.2 PERFORMANCE

The Contract Administrator for the State will conduct quarterly performance reviews of performance under the contract. The format and content of the quarterly review will be shared with the Vendor Project Manager. The quarterly performance reviews will assess the Vendor's compliance with the Scope of Work (task order) and the individual performance of contract staff as needed. The performance reviews may include requirements of the Vendor to take corrective action related to staff performance.

6.3 DISPUTE RESOLUTION

The parties agree that it is in their mutual interest to resolve disputes informally. A claim by the Vendor shall be submitted in writing to the State's Contract Administrator for resolution. A claim by the State shall be submitted in writing to the Vendor's Project Manager for resolution. The Parties shall negotiate in good faith and use all reasonable efforts to resolve such dispute(s). During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. If a dispute cannot be resolved between the Parties within thirty (30) days after delivery of notice, either Party may elect to exercise any other remedies available under this Contract, or at law. This term shall not constitute an agreement by either party to mediate or arbitrate any dispute.

6.4 CONTRACT CHANGES

Contract changes, if any, over the life of the contract shall be implemented by contract amendments agreed to in writing by the State and Vendor.

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

Per RFP Section 5.1 GENERAL, SCOPE OF WORK, Vendors may choose to submit an offer for all task order categories or only certain categories. Indicate below which task order category(s) Vendor would like to perform work. While Vendors may choose which task order category(s), DCR makes no guarantee of task order award, volume of task orders Vendors will receive, or the task order types Vendors will receive. Task Orders will not be made outside of the task order category(s) selected by the Vendor during this solicitation process.

- YES NO **TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)**
- YES NO **TASK 2 – Financial Compliance, Oversight, and Fraud Prevention**
- YES NO **TASK 3 – Duplication of Benefits (DOB) Compliance**
- YES NO **TASK 4 – Procurement Compliance and Monitoring**
- YES NO **TASK 5 – Claims, Appeals, and Case Reviews**
- YES NO **TASK 6 – Action Plan Development and Amendments**
- YES NO **TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support**
- YES NO **TASK 8 – Program Performance Monitoring and Evaluation**
- YES NO **TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation**
- YES NO **TASK 10 – Audit Readiness and Monitoring Support**
- YES NO **TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects**
- YES NO **TASK 12 – Training, Technical Assistance, and Capacity Building**
- YES NO **TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support**
- YES NO **TASK 14 – Communication, Public Information, and Outreach Support**
- YES NO **TASK 15 – Grant Management**
- YES NO **TASK 16 – Technical Systems Specification & Project Management**
- YES NO **TASK 17 – Environmental Review**

PRICING:

Vendor to replicate the table below and provide an hourly not-to-exceed rate per position for each task order category(s) offered with its solicitation response. Rates shall be inclusive of salary, overhead, administrative and other similar fees, travel and other expenses. Vendor is responsible for providing cell phones, computers/laptops, and all IT support related thereto.

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 10 – Audit Readiness and Monitoring Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			
Reevaluation Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			

*For Environmental Review provide a unit cost for each of the below levels of environmental review, as well as a unit cost for environmental review reevaluation.

- Exempt
- Categorically Excluded Not Subject to §58.5
- Categorically Excluded Subject to §58.5
- Environmental Assessment
- Environmental Impact Statements

ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS

I. READ, REVIEW AND COMPLY

It shall be the Vendor's responsibility to read this entire document; review all enclosures, attachments, and any Addenda; and comply with all requirements specified, whether appearing in these Instructions to Vendors or elsewhere in the Solicitation document.

Any gender-specific pronouns used herein, whether masculine or feminine, shall be read and construed as gender neutral, and the singular of any word or phrase shall be read to include the plural and vice versa.

II. REQUEST FOR OFFERS

Vendors are cautioned that this is a request for Offers, not an offer or request to contract, and the State reserves the unqualified right to reject any and all bids at any time if such rejection is deemed to be in the best interest of the State.

By submitting Your Bid or Proposal, You are offering to enter into a contract with the State.

The Contract is a separate document that represents the Vendor's and the State's entire agreement. If Your bid is accepted and results in a Contract, You will be expected to accept the North Carolina General Terms And Conditions included in the Solicitation document as part of the Contract. Depending upon the good or service being offered, other terms and conditions may apply.

III. DUTY TO INQUIRE

Offeror, by submitting an Offer, represents that it has read and understands the Solicitation and that its Offer is made in compliance with the Solicitation. Offerors are expected to examine the Solicitation thoroughly and should request an explanation for any ambiguities, discrepancies, errors, omissions, or conflicting statements in the Solicitation. Failure to do so will be at the Offeror's risk. All ambiguities, discrepancies, errors, omissions, or conflicting statements in the Solicitation shall be interpreted to require the better quality or greater quantity of work and/or materials, unless otherwise directed by Addendum. Offeror assumes responsibility for any patent ambiguity in the Solicitation that Offeror does not bring to the State's attention.

IV. DEFINITIONS, ACRONYMS AND ABBREVIATIONS

The following definitions, acronyms, and abbreviations may be used within the Solicitation document.

1. **AGENCY SPECIFIC TERM CONTRACT:** A contract generally intended to cover all normal requirements for a commodity for a specified period of time based on estimated quantities for a single entity.
2. **ADDENDUM:** a document issued to supplement or modify the original Solicitation document. Addenda may be issued following a pre-bid/pre-proposal conference or as a result of a specification or work scope changes to the Solicitation.
3. **BAFO:** Best and Final Offer, submitted by a Vendor to alter its initial bid, made in response to a request by the issuing agency.
4. **BUYER:** The employee of the State or Other Eligible Entity that places an order with the Vendor.
5. **COMMUNITY COLLEGE:** Any of the fifty-eight (58) public North Carolina Community Colleges.
6. **CONTRACT:** A contract resulting from or arising out of Vendor responses to this Solicitation.

7. **CONTRACT ADMINISTRATOR:** A representative of the Agency who is responsible for the functions that are performed after all parties have signed a contract, including any modifications to the contract.
8. **CONTRACT MANAGER:** A representative of the agency or awarded vendor who ensures compliance with the contract terms and conditions while giving attention to the achievement of the stated output and outcome of the contract.
9. **ELECTRONIC VENDOR PORTAL (eVP):** System for vendors to do business with the State of North Carolina, including registering to do business, responding to bid opportunities, and certifying as a HUB and/or NCSBE.
10. **E-PROCUREMENT SERVICES:** The program, system, and associated services through which the State conducts electronic procurement.
11. **FOB-DESTINATION:** Title changes hand from Vendor to purchaser at the destination point of the shipment; Vendor owns the commodity in transit and files any claims. Vendor pays all freight and any related transportation charges. A Solicitation may request that a Vendor separately identify freight charges in its bid, but no amount or charge not included as part of the total bid price will be paid.
12. **HUB:** Historically Underutilized Business <https://ncadmin.nc.gov/businesses/hub>
13. **IFB:** Invitation for Bids (a type of Solicitation document)
14. **LOT:** A grouping of similar products within this Solicitation document.
15. **OFFER:** the bid or proposal submitted in response this Solicitation. The terms Bid and Proposal are used interchangeably with the term Offer.
16. **OFFEROR:** the single legal entity submitting the Offer. The term Bidder is used interchangeably with the term Offeror. See bidding provisions entitled Signing Your Offer and Bid/Proposal As Offer To Contract.
17. **ON-TIME DELIVERY:** The delivery of all items within a single order to the receiving point designated by the ordering entity within the delivery time required.
18. **PROCUREMENT LEAD:** Representative of the agency identified on the first page of the Solicitation document who will correspond with potential Vendors concerning Solicitation issues, will contract with the Vendor providing the best offer to the State, and is the individual who will administer the Contract for the State.
19. **QUALIFIED BID/PROPOSAL:** A responsive bid submitted by a responsible Vendor.
20. **RESPONSIBLE:** Refers to a Vendor who demonstrates in its Offer that it has the capability to perform the requirements of the Solicitation.
21. **RESPONSIVE:** Refers to an Offer that conforms to the Requirements of the Solicitation in all respects to be considered by the State for award.
22. **RFI:** Request for Information (an information gathering tool that does not result in a contract)
23. **RFP:** Request for Proposals (a type of Solicitation document)
24. **RFP:** Request for Pre-Qualifications (a type of Solicitation document)

- 26. **STATE:** The State of North Carolina, including any of its sub-units recognized under North Carolina law.
- 27. **STATE AGENCY:** Any of the more than 400 sub-units within the executive branch of the State, including its departments, institutions, boards, commissions, universities, and units of the State.
- 28. **STATE DEPARTMENTS:** Department of Administration, Department of Agriculture and Consumer Services, Department of Commerce, Department of Natural and Cultural Resources, Department of Environmental Quality, Department of Health and Human Services, Department of Information Technology, Department of Insurance, Department of Justice, Department of Labor, Department of Military and Veteran Affairs, Department of Public Instruction, Department of Public Safety, Department of Revenue, Department of State Treasurer, Office of the Secretary of the State, Department of Transportation, Wildlife Resources Commission, Office of Budget and Management, Office of the Governor, Office of the Lieutenant Governor, Office of The State Auditor, Office of the State Controller.
- 29. **VENDOR:** The supplier, bidder, proposer, company, firm, corporation, partnership, individual or other entity submitting a response to a Solicitation document. Following award of a contract, the term refers to an entity receiving such an award.
- 30. **WORK:** All labor, materials, equipment, services, or property of any type, provided or to be provided by the Contractor to fulfill the Contractor's obligations under the Contract.
- 31. **YOU and YOUR:** Offeror.

V. INTERPRETATION OF TERMS AND PHRASES

The Solicitation document serves to advise potential Vendors of the parameters of the solution being sought by the State. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether bids should be evaluated or rejected, the State will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the State's needs as described in the Solicitation. Except as specifically stated in the Solicitation, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement, if determined to be essential under the circumstances then existing, may result in the State exercising its discretion to reject a bid in its entirety.

VI. BID SUBMISSION

- 1. **VENDOR'S REPRESENTATIVE:** Each Vendor shall submit with its bid the name, address, and telephone number of the person(s) with authority to bind the Vendor and answer questions or provide clarification concerning the Vendor's bid.
- 2. **SIGNING YOUR OFFER:** Every Offer must be signed by an individual with actual authority to bind the Offeror.
 - a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm.
 - b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words by its Partner, and signed by a general partner.
 - c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign.

d) An Offer may be submitted by a joint venture involving any combination of individuals, partnerships, or corporations. If the Offeror is a joint venture, the Offer must be submitted in the name of the Joint Venture and signed by every participant in the joint venture in the manner prescribed in paragraphs (a) through (c) above for each type of participant.

e) If an Offer is signed by an agent, other than as stated in subparagraphs(a)through (d) above, the Offer must state that is has been signed by an Agent. Upon request, Offeror must provide proof of the agent's authorization to bind the principal.

3. **EXECUTION:** Failure to sign the Execution Page (numbered page 1 of the Solicitation document) in the indicated space may render an Offer nonresponsive, and it may be rejected.

4. **STATE OFFICE CLOSINGS:** If an emergency or unanticipated event interrupts normal government processes so that Offers cannot be received at the State office designated for receipt of bids by the exact time specified in the Solicitation, the time specified for receipt of Offers will be deemed to be extended to the same time of day specified in the Solicitation on the first work day on which normal government processes resume. In lieu of an automatic extension, an Addendum may be issued to reschedule the bid opening. If State offices are closed at the time a pre-bid or pre-proposal conference is scheduled, an Addendum will be issued to reschedule the conference.

5. **BID IN ENGLISH and DOLLARS:** Offers submitted in response to this Solicitation shall be in the English language and in US dollars, unless otherwise permitted by the Solicitation.

6. **LATE BIDS:** Late bids, regardless of cause, will not be opened or considered, and will automatically be disqualified from further consideration. It shall be the Vendor's sole responsibility to ensure delivery at the designated office by the designated time.

a) Vendor shall bear the risk for late submission due to unintended or unanticipated delay— whether submitted electronically, delivered by hand, U.S. Postal Service, courier or other delivery service. It is the Vendor's sole responsibility to ensure that its bid has been received by this Office by the specified time and date of opening. The date and time of submission will be marked on each bid when received, and any bid received after the bid submission deadline will be rejected.

b) For proposals submitted via U.S. mail, please note that the U.S. Postal Service generally does not deliver mail to a specified street address but to the State's Mail Service Center. Vendors are cautioned that proposals sent via U.S. Mail, including Express Mail, may not be delivered by the Mail Service Center to the agency's purchasing office on the due date in time to meet the proposal deadline. All Vendors are urged to take the possibility of delay into account when submitting a proposal by U.S. Postal Service, courier, or other delivery service.

7. **DETERMINATION OF RESPONSIVENESS:** Any Offer which fails to conform to the material requirements of the Solicitation maybe rejected as nonresponsive. Offers which impose conditions that modify material requirements of the Solicitation may be rejected. If a fixed price is required, an Offer will be rejected if the total possible cost to the State cannot be determined. Offerors will not be given an opportunity to correct any material nonconformity. Any deficiency resulting from a minor informality may be cured or waived at the sole discretion of the Procurement Officer.

8. **CONTENTS OF OFFER:**

a) Offers should be complete and carefully worded and should convey all of the information requested.

b) Offers should be prepared simply and economically, providing a straightforward, concise description of the Offeror's capabilities to satisfy the requirements of the Solicitation. Emphasis should be on completeness and clarity of content.

c) If Your Offer includes any comment over and above the specific information requested in the Solicitation, you are to include this information as a separate appendix to Your Offer. Offers which include either modifications to any of the Solicitation's contractual requirements or an Offeror's standard terms and conditions may be deemed non-responsive and not considered for award at the State's discretion.

9. **MULTIPLE OFFERS.** If specifically stated in the Solicitation document, Offerors may submit more than one Offer, provided that each Offer has significant differences other than price. Each separate Offer must satisfy all Solicitation requirements.

10. **CLARIFICATION:** The State may elect to communicate with You after bid opening for the purpose of clarifying either Your Offer or the requirements of the Solicitation. Such communications may be conducted only with Offerors who have submitted an Offer which obviously conforms in all material aspects to the Solicitation. Clarification of an Offer must be documented in writing and included with the Offer. Clarifications may not be used to revise an Offer or the Solicitation.

11. **ACCEPTANCE AND REJECTION:** The State reserves the right to reject any and all bids, to waive any informality in bids and, unless otherwise specified by the Vendor, to accept any item in the bid.

12. **BASIS FOR REJECTION:** Pursuant to 01 NCAC 05B .0501, the State reserves the right to reject any and all Offers, in whole or in part, by deeming the Offer unsatisfactory as to quality or quantity, delivery, price or service offered, non-compliance with the requirements or intent of this Solicitation, lack of competitiveness, error(s) in specifications or indications that revision would be advantageous to the State, cancellation or other changes in the intended project or any other determination that the proposed requirement is no longer needed, limitation or lack of available funds, circumstances that prevent determination of the best offer, or any other determination that rejection would be in the best interest of the State.

13. **INFORMATION AND DESCRIPTIVE LITERATURE:** Vendor shall furnish all information requested in the Solicitation document. Further, if required elsewhere in this bid, each Vendor shall submit with its bid any sketches, descriptive literature, and/or complete specifications covering the goods and services offered. Reference to literature submitted with a previous bid or available elsewhere will not satisfy this provision. Do not submit bid samples or descriptive literature unless expressly requested. Unsolicited bid samples or descriptive literature will not be examined or tested, will not be used to determine responsiveness, and will not be deemed to vary any of the provisions of the Solicitation. Failure to comply with these requirements shall constitute sufficient cause to reject a bid without further consideration.

14. **WITHDRAWAL OF BID OR PROPOSAL:** Proposals submitted electronically may be withdrawn at any time prior to the date for bid opening identified on the cover page of this Solicitation document (or such later date included in an Addendum). Proposals that have been delivered by hand, U.S. Postal Service, courier, or other delivery service may be withdrawn only in writing and if receipt is acknowledged by the office issuing the Solicitation document prior to the time for opening identified on the cover page of the Solicitation document (or such later date included in an Addendum). Written withdrawal requests shall be submitted on the Vendor's letterhead and signed by an official of the Vendor authorized to make such request. Any withdrawal request made after bid opening shall be allowed only for good cause shown and in the sole discretion of the Division of Purchase and Contract.

15. **COST FOR BID OR PROPOSAL PREPARATION:** Any costs incurred by Vendor in preparing or submitting Offers are the Vendor's sole responsibility.

16. **INSPECTION AT VENDOR'S SITE:** The State reserves the right to inspect, at a reasonable time, the equipment, item, plant, or other facilities of a prospective Vendor prior to Contract award, and during the Contract term as necessary for the State's determination that such equipment, item, plant, or other facilities conform with the specifications/requirements and are adequate and suitable for the proper and effective performance of the Contract.

17. **RECYCLING AND SOURCE REDUCTION:** It is the policy of the State to encourage and promote the purchase of products with recycled content to the extent economically practicable, and to purchase items which are reusable, refillable, repairable, more durable, and less toxic to the extent that the purchase or use is practicable and cost-effective. We also encourage and promote using minimal packaging and the use of recycled/recyclable products in the packaging of commodities purchased. However, no sacrifice in quality of packaging will be acceptable. The company remains responsible for providing packaging that will adequately protect the commodity and contain it for its intended use. Companies are strongly urged to bring to the attention of purchasers those products or packaging they offer which have recycled content and that are recyclable.

18. **CERTIFICATE TO TRANSACT BUSINESS IN NORTH CAROLINA:** As a condition of Contract award, each out-of-State Vendor that is a corporation, limited-liability company, or limited-liability partnership shall have received, and shall maintain throughout the term of The Contract, a Certificate of Authority to Transact Business in North Carolina from the North Carolina Secretary of State, as required by North Carolina law. A State contract requiring only an isolated transaction completed within a period of six months, and not in the course of a number of repeated transactions of like nature, shall not be considered transacting business in North Carolina and shall not require a Certificate of Authority to Transact Business.

19. **SUSTAINABILITY:** To support the sustainability efforts of the State of North Carolina we solicit Your cooperation in this effort. Pursuant to Executive Order 156 (1999), it is desirable that all responses meet the following:

- a) If paper copies are requested, all copies of the bid are printed double sided. All submittals and copies are printed on recycled paper with a minimum post-consumer content of 30%.
- b) Unless absolutely necessary, all bids and copies should minimize or eliminate use of non- recyclable or non-reusable materials such as plastic report covers, plastic dividers, vinyl sleeves, and GBC binding. Three-ringed binders, glued materials, paper clips, and staples are acceptable.
- c) Materials should be submitted in a format which allows for easy removal, filing and/or recycling of paper and binder materials. Use of oversized paper is strongly discouraged unless necessary for clarity or legibility.

20. **HISTORICALLY UNDERUTILIZED BUSINESSES (HUB):** The State is committed to retaining Vendors from diverse backgrounds, and it invites and encourages participation in the procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. In particular, the State encourages participation by Vendors certified by the State Office of Historically Underutilized Businesses, as well as the use of HUB-certified vendors as subcontractors on State contracts.

21. **RECIPROCAL PREFERENCE:** G.S. 143-59 establishes a reciprocal preference requirement to discourage other states from favoring their own resident Vendors by applying a percentage increase to the price of any bid from a North Carolina resident Vendor. To the extent another state does so, North Carolina applies the same percentage increase to

the bid of a Vendor resident in that state. Residency is determined by a Vendor's "Principal Place of Business," defined as that principal place from which the overall trade or business of the Vendor is directed or managed.

22. **INELIGIBLE VENDORS:** As provided in G.S. 147-86.59 and G.S. 147-86.82, the following companies are ineligible to contract with the State of North Carolina or any political subdivision of the State:

a) any company identified as engaging in investment activities in Iran, as determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, and

b) any company identified as engaged in a boycott of Israel as determined by appearing on the List of restricted companies created by the State Treasurer pursuant to G.S. 147-86.81. A contract with the State or any of its political subdivisions by any company identified in a) or b) above shall be void *ab initio*.

23. **VALID TAXPAYER INFORMATION:** All persons or entities desiring to do business with the State must provide correct taxpayer information on North Carolina specified forms. The Substitute W-9 and Instructions are here: https://files.nc.gov/ncosc/documents/NCAS_forms/State_of_North_Carolina_Sub_W-9_01292019.pdf

24. **VENDOR REGISTRATION AND SOLICITATION NOTIFICATION SYSTEM:** The North Carolina electronic Vendor Portal (eVP) allows Vendors to electronically register free with the State to receive electronic notification of current procurement opportunities available as well as notifications of status changes to those Solicitations. Online registration and other purchasing information is available at the following website: <https://evp.nc.gov>.

25. The status of a Vendor's E-Procurement Services account(s) shall be considered a relevant factor in determining whether to approve the award of a Contract resulting from this Solicitation document. Any Vendor with an E-Procurement Services account that is in arrears by 91 days or more at the time of bid opening may be suspended or deactivated, at the State's discretion, and may be disqualified from further evaluation or consideration.

26. **TABULATIONS:** Bid tabulations can be electronically retrieved at the Electronic Vendor Portal (eVP), <https://evp.nc.gov>. Tabulations will normally be available at this web site not later than one working day after the bid opening. If negotiation is anticipated under 01 NCAC 05B.0503, pricing may not be public until award. Lengthy or complex tabulations may be summarized, with other details not made available on eVP. Requests for additional details or information concerning such tabulations cannot be honored.

27. **CONFIDENTIAL INFORMATION:** To the extent permitted by applicable statutes and rules, the State will maintain as confidential trade secrets in bids that the Vendor does not wish disclosed. As a condition to confidential treatment, each page containing trade secret information shall be identified in boldface at the top and bottom as "CONFIDENTIAL" by the Vendor, with specific trade secret information enclosed in boxes, marked in a distinctive color or by similar indication. Cost information shall not be deemed confidential under any circumstances. Regardless of what a Vendor may label as a trade secret, the determination whether it is or is not entitled to protection will be determined in accordance with G.S. 132-1.2. Any material labeled confidential constitutes a representation by the Vendor that it has made a reasonable effort in good faith to determine that such material is, in fact, a trade secret under G.S. 132-1.2. Vendors are urged to limit the marking of information as a trade secret or as confidential so far as is possible. If a legal action is brought to require the disclosure of any material so marked confidential, the State will notify Vendor of such action and allow Vendor to defend the confidential status of its information.

28. **COMMUNICATIONS BY VENDORS:** In submitting its bid, the Vendor agrees not to discuss or otherwise reveal the contents of its bid to any source, government or private, outside of the using or issuing agency until after the award of the Contract or cancellation of this Solicitation. All Vendors are forbidden from having any communications with the

using or issuing agency, or any other representative of the State concerning the Solicitation, during the evaluation of the bids (i.e., after the public opening of the bids and before the award of the Contract), unless the State directly contacts the Vendor(s) for purposes of seeking clarification or another reason permitted by the Solicitation. A Vendor shall not: (a) transmit to the issuing and/or using agency any information commenting on the ability or qualifications of any other Vendor to provide the advertised good, equipment, commodity; (b) identify defects, errors and/or omissions in any other Vendor's bid and/or prices at any time during the procurement process; and/or (c) engage in or attempt any other communication or conduct that could influence the evaluation or award of a Contract related to this Solicitation. Failure to comply with this requirement shall constitute sufficient justification to disqualify a Vendor from a Contract award. Only those communications with the using agency or issuing agency authorized by this Solicitation are permitted.

29. **INFORMAL COMMENTS:** The State shall not be bound by informal explanations, instructions or information given at any time by anyone on behalf of the State during the competitive process or after award. The State is bound only by information provided in writing in this Solicitation document and in formal Addenda.

30. **PROTEST PROCEDURES:** When a Vendor wishes to protest a contract awarded by the Division of Purchase and Contract or awarded by an agency when the award amount exceeds the agency's general delegation and the contract is not subject to a special delegation or exemption, a Vendor shall submit a written request addressed to the State Purchasing Officer at: Division of Purchase and Contract, 1305 Mail Service Center, Raleigh, NC 27699-1305.

When a Vendor wishes to protest a contract awarded by an agency when the award amount is less than an agency's general delegation or when the contract is subject to a special delegation or exemption the Vendor shall submit a written request to protest to the purchasing officer of the agency that issued the award.

The protest request must be received in the proper office within thirty (30) consecutive calendar days from the date of the Contract award. Protest letters shall contain specific grounds and reasons for the protest, how the protesting party was harmed by the award made and any documentation providing support for the protesting party's claims.

Note: Contract award notices are sent only to the Vendor actually awarded the contract, and not to every person or firm responding to a Solicitation. Award notices are posted on eVP at <https://evp.nc.gov>. All protests will be handled pursuant to the North Carolina Administrative Code, 01 NCAC 05B .1519.

31. **ORDER OF PRECEDENCE:** In cases of conflict between specific provisions in this Solicitation or those in any resulting Contract documents, the order of precedence shall be (high to low) (1) any special terms and conditions specific to this Solicitation document, including any negotiated terms, (2) requirements and specifications and administration, (3) North Carolina General Terms and Conditions in North Carolina General Terms And Conditions, (4) Instructions To Vendors, (5) Pricing, and (6) Vendor's Bid.

32. **ADDENDA:** Critical updated information may be included in Addenda to the Solicitation. It is important that all Vendors bidding on the Solicitation periodically check for any Addenda that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in the Solicitation document and all Addenda thereto. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued concerning the Solicitation.

33. **ORAL EXPLANATIONS NON-BINDING:** Oral explanations or instructions will not be binding. Any information given a prospective Offeror concerning a Solicitation will be furnished promptly to all other prospective Offerors as an Addendum to the Solicitation, if that information is necessary for submitting offers or if the lack of it would be

prejudicial to other prospective Offerors. See clause herein entitled "Duty to Inquire." The State will not identify You in its answer to Your question.

34. **MAXIMUM COMPETITION:** The State seeks to permit the maximum practicable competition. Offerors are urged to advise the State, as soon as possible, regarding any aspect of this procurement, including any aspect of the Solicitation that unnecessarily or inappropriately limits full and open competition. If the State determines that any changes will be made resulting from the questions asked, then such decisions will be communicated in the form of an Addendum.

35. **FIRM OFFER:** Vendor's bid shall constitute a firm offer. By execution and delivery of a bid in response to a Solicitation, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposefully or inadvertently, shall have no force or effect, and will be disregarded. Any bid that contains language that indicates the bid is non-binding or subject to further negotiation before a contractual document may be signed shall be rejected.

ATTACHMENT C: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS

1. PERFORMANCE:

- a) It is anticipated that the tasks and duties undertaken by the Vendor under the contract which results from the State solicitation in this matter (Contract) shall include Services, and/or the manufacturing, furnishing, or development of goods and other tangible features or components, as deliverables.
- b) Vendor agrees to perform under the Contract in at least the same or similar manner provided to comparable users and customers. The State shall notify the Vendor of any defects or deficiencies in performance or failure of deliverables to conform to the standards and specifications provided in this Contract. Vendor agrees to timely remedy defective performance or any nonconforming deliverables on its own or upon such notice provided by the State.
- c) Vendor has a limited, non-exclusive license to access and use State Data provided to Vendor, but solely for performing its obligations under and during this Agreement and in confidence as further provided for herein or by law.
- d) Vendor or its suppliers, as specified and agreed in the Contract, shall provide support assistance to the State related to all Services performed or other deliverables procured hereunder during the State's normal business hours. Vendor warrants that its support, customer service, and assistance will be performed at a minimum in accordance with generally accepted and applicable industry standards.
- e) The State may document and take into account in awarding or renewing future procurement contracts the general reputation, performance, and performance capabilities of the Vendor under this Contract as provided by G.S. 143-52 and 143-135.9 (a) and (b) (Best Value).

2. DEFAULT AND TERMINATION.

- a) In the event of default by the Vendor, the State may, as provided by NC law, procure goods and services necessary to complete performance hereunder from other sources and hold the Vendor responsible for any excess cost occasioned thereby. See, G.S. 25-2-712. In addition, and in the event of default by the Vendor under the Contract, or upon the Vendor filing a petition for bankruptcy or the entering of a judgment of bankruptcy by or against the Vendor, the State may immediately cease doing business with the Vendor, terminate the Contract for cause, and take action to recover relevant damages, and if permitted by applicable law, debar the Vendor from doing future business with the State. 01 NCAC 05B.1520.
- b) Liquidated damages for not completing the work within 150 calendar days for reconstruction projects, 60 calendar days for MHU replacement projects, 30 calendar days for demolition projects, and 30 calendar days for rehabilitation projects with a scope <\$50,000, 60 calendar days for rehabilitation projects with a scope >\$50,000 and <\$100,00, 90 calendar days for rehabilitation projects with a scope >\$100,000 and <\$150,000, 120 calendar days for rehabilitation projects with a scope >\$150,000 commencing on the date specified in written Notice to Proceed, including all officially approved extensions thereto, are to be One Hundred Dollars and No/100 (\$100.00) PER DAY, per individually assigned Project. The Contractor may be liable for liquidated damages in the amount of One Hundred Dollars and No/100 (\$100.00) PER DAY, per affected Project, if Contractor fails to complete the work within the contracted period. If, through any cause, Vendor shall fail to fulfill in a timely and proper manner the obligations under the Contract, including, without limitation, in these North Carolina General Terms and Conditions, the State shall have the right to impose liquidated damages per affected Project as described herein, issue a Stop Work Order requiring Vendor to immediately Stop Work on any or all of Vendor's Projects, demand return of expended funds, and/or terminate the Contract by giving at least five days written notice to the Vendor and specifying the effective date thereof. In the event of a Stop Work Order or a Contract termination, any or all finished or unfinished deliverables that are prepared by the Vendor under the Contract shall, at the option of the

State, become the property of the State until such time as the State can identify another Vendor to complete the work (and shall include any applicable Vendor license and permits to the extent necessary for the State to use such property), and the Vendor may be entitled to receive just and equitable compensation for any acceptable deliverable completed (or partially completed at the State’s sole discretion) as to which such option is exercised. Notwithstanding, Vendor shall not be relieved of liability to the State for damages sustained by the State by virtue of any breach of the Contract, and the State may withhold any payment due the Vendor for the purpose of setoff until such time as the exact amount of damages due the State from such breach can be determined. The State, if failing to receive proper performance or provision of goods deliverables, or if documented Vendor Services performance issues exist, under this Contract, may make a claim upon the Vendor’s surety. G.S. 143-52(a); 01 NCAC 05B.1521; G.S. 25-2-609. If this Contract contemplates deliveries or performance over a period of time, the State may terminate this Contract for convenience at any time by providing 30 days’ notice in writing from the State to the Vendor. In that event, any or all finished or unfinished deliverables prepared by the Vendor under this Contract shall, at the option of the State, become its property, and under any applicable Vendor license and permits to the extent necessary for the State to use such property. If the Contract is terminated by the State for convenience, the State shall pay for those items or Services for which such option is exercised, less any payment or compensation previously made.

- c) The State may terminate this Contract, and any Scope of Work/Task Order assigned under this Contract, immediately upon discovery of the Vendor’s commission of fraud.
- d) This Contract may be terminated at any time by mutual agreement of the State and the Vendor, to be effective upon a date agreed to by the State and the Vendor.
- e) If funds for the project become unavailable for any reason, including without limitation, a change in state or federal laws, the State shall have the right to terminate this Contract, and any Scope of Work/Task Order assigned thereto, after giving Vendor written notice of termination at least 5 calendar days in advance of the termination date. The notice of termination shall contain the effective termination date of this Contract. Upon notice, the Vendor shall not expend any funds without the State’s express written authorization.
- f) The Vendor acknowledges and agrees that the rights and remedies of the State as set forth herein and elsewhere in this Contract are not exclusive and are in addition to any other rights and remedies provided by law.

3. INTERPRETATION, CONFLICT OF TERMS.

- a) The definitions in the Instructions to Vendors in the relevant solicitation for this Contract, and in 01 NCAC 05A.0112 are specifically incorporated herein.
- b) If federal funds are involved in the transactions under this Contract, the Vendor shall comply with all applicable state and federal requirements and laws, except where State requirements are more restrictive. See the additional federal requirements included in the “Federal Funds Provisions” section below.
- c) “Purchasing Agency” herein is as defined in 01 NCAC 05A.0112, except that if this Contract has been entered into by the NC Department of Administration, Division of Purchase and Contract (P&C) as indicated in the Contract (e.g., a State Term Contract), then P&C will then be a Purchasing Agency for the purposes herein and in the Federal Funds Provisions, below.
- d) Contracts made in contravention of General Statutes, Chapter 143, Article 3 and the Rules in 05 NCAC Chapter 5, are void. G.S. 143-58.
- e) In cases of conflict between specific provisions in this Contract and any other referenced documents, the Order of Precedence shall be (high to low) (1) any special terms and conditions specific to this Contract, including any negotiated terms; (2) requirements, specifications and administrative terms; (3) these

NORTH CAROLINA GENERAL TERMS AND CONDITIONS, including the Federal Funds Provisions; (4) Definitions and other provisions in INSTRUCTIONS TO VENDORS in this solicitation, which is specifically incorporated in this Contract; (5) PRICING, and (6) Vendor’s Bid, to the extent specifically and mutually incorporated into this Contract.

- f) In the event of conflict of terms between applicable provisions of the Federal Funds Provisions and the other provisions of these North Carolina General Contract Terms and Conditions, the more restrictive provision will govern.

4. GOVERNMENTAL RESTRICTIONS: In the event any Governmental restrictions are imposed which necessitate alteration of the goods, material, quality, workmanship, or performance of the Services offered, prior to acceptance, it shall be the responsibility of the Vendor to notify the State Contract Lead or Administrator indicated in the Contract at once, in writing, indicating the specific regulation which requires such alterations. The State reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the Contract.

5. AVAILABILITY OF FUNDS: Any and all payments to the Vendor shall be dependent upon and subject to the availability of funds appropriated or allocated to the agency for the purpose set forth in the Contract, including the availability of federal funds intended for the purpose set forth in the Contract.

6. TAXES: Any applicable taxes shall be invoiced as a separate item.

- a) G.S. 143-59.1 bars the Secretary of Administration from entering into Contracts with Vendors if the Vendor or its affiliates meet one of the conditions of G.S. 105-164.8(b) and refuses to collect use tax on sales of tangible personal property to purchasers in North Carolina. Conditions under G.S. 105-164.8(b) include: (1) Maintenance of a retail establishment or office, (2) Presence of representatives in the State that solicit sales or transact business on behalf of the Vendor and (3) Systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. By execution of the proposal document the Vendor certifies that it and all of its affiliates, (if it has affiliates), collect(s) the appropriate taxes.
- b) The agency(ies) participating in the Contract are exempt from Federal Taxes, such as excise and transportation. Exemption forms submitted by the Vendor will be executed and returned by the using agency.
- c) Prices offered are not to include any personal property taxes, nor any sales or use tax (or fees) unless required by the North Carolina Department of Revenue.

7. SITUS AND GOVERNING LAWS;

- a) This Contract is made under and shall be governed by and construed in accordance with the laws of the State of North Carolina, including, without limitation, the relevant provisions of G.S. Chapter 143, Article 3, and the Rules in 01 NCAC Chapter 05, and any applicable successor provisions, without regard to its conflict of laws rules, and within which State all matters, whether sounding in Contract, tort or otherwise, relating to its validity, construction, interpretation and enforcement shall be determined. G.S. 22B-3.
- b) Vendor shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business and its performance in accordance with the Contract, including those of federal, state, and local agencies having jurisdiction and/or authority, and including, without limitation, the applicable requirements in the Federal Funds Provisions, below.
- c) Non-resident Vendor corporations not formed under NC law must be domesticated in the Office of the NC Secretary of State in order to contract with the State of North Carolina. G.S. 55A-15-01.

8. NON-DISCRIMINATION COMPLIANCE:

- a) The Vendor will take affirmative action in complying with all State requirements and laws concerning fair employment and employment of people with disabilities, and concerning the treatment of all employees

without regard to discrimination by reason of race, color, religion, sex, national origin or disability or rights, such as preserved by Governor Roy Cooper Order E.O. 24 or 25, and will take necessary action to ensure that its internal employee policies and procedures are consistent with Executive Order #82 (Roy Cooper, December 6, 2018), which extends workplace protections and accommodations to pregnant employees.

- b) Federal Law, such as the following, applies as provided for therein: Titles VI and VII of the Civil Rights Act of 1964 (PL 88-352), and the regulations issued pursuant thereto (prohibiting discrimination on the basis race, color, national origin and ensuring that individuals are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age); Title IX of the Education Amendments of 1972 (codified as amended at 20 U.S.C. § 1681 et seq.) (prohibiting discrimination on the basis of sex); Titles I, II, III, IV, and V of the Americans with Disability Act of 1990 (prohibiting discrimination on the basis of disability); Section 504 of the Rehabilitation Act of 1973 (codified as amended at 29 U.S.C. § 794) (prohibiting discrimination on the basis of handicap); the Age Discrimination Act of 1975 (codified as amended at 42 U.S.C. § 6101 et seq.) (prohibiting age discrimination); and Section 109 of the Housing and Community Development Act of 1974, as amended.

- 9. **PAYMENT TERMS:** Payment terms are net not later than 30 days after receipt of a correct invoice or acceptance of goods, whichever is later. The Procuring Agency is responsible for all payments to the Vendor under the Contract. Payment by some agencies may be made by procurement card. If the Vendor accepts Visa, MasterCard, etc., from other customers, it shall accept procurement card payment by the State under the terms provided for the procurement card. 01 NCAC 05B.1523. If payment is made by procurement card, then payment for amounts then due may be processed immediately by the Vendor.

The State does not agree in advance, in contract, pursuant to Constitutional limitations, to pay costs such as interest, late fees, penalties or attorney’s fees. This Contract will not be construed as an agreement by the State to pay such costs, and will be paid only as ordered by a court of competent jurisdiction.

- 10. **CONDITION AND PACKAGING:** Unless otherwise expressly provided by special terms and conditions or specifications in the Contract or by express, specific federal law or rule, it is understood and agreed that any item offered or shipped has not been sold or used for any purpose, is newly manufactured, and shall be in first class condition. All containers/packaging shall be suitable for handling, storage or shipment.

- 11. **INTELLECTUAL PROPERTY WARRANTY AND INDEMNITY:** Vendor shall hold and save the State, its officers, agents and employees, harmless from liability of any kind, including costs and expenses, resulting from infringement of the rights of any third party in any Services or copyrighted material, patented or patent-pending invention, article, device or appliance delivered in connection with the Contract.

- a) Vendor warrants to the best of its knowledge that:
 - i) Performance under the Contract does not infringe upon any intellectual property rights of any third party; and
 - ii) There are no actual or threatened actions arising from, or alleged under, any intellectual property rights of any third party;
- b) Should any deliverables supplied by Vendor become the subject of a claim of infringement of a patent, copyright, trademark or a trade secret in the United States, the Vendor, shall at its option and expense, either procure for the State the right to continue using the deliverables, or replace or modify the same to become non-infringing. If neither of these options can reasonably be taken in Vendor’s judgment, or if further use shall be prevented by injunction, the Vendor agrees to cease provision of any affected deliverables and refund any sums the State has paid Vendor for such deliverables and make every reasonable effort to assist the State in procuring substitute deliverables. If, in the sole opinion of the State, the cessation of use by the State of any such deliverables due to infringement issues makes the retention of other items acquired from the Vendor under this Agreement impractical, the State shall then have the

option of terminating the Agreement, or applicable portions thereof, without penalty or termination charge; and Vendor agrees to refund any sums the State paid for unused Services or other deliverables.

- c) The Vendor, at its own expense, shall defend any action brought against the State to the extent that such action is based upon a claim that the deliverables supplied by the Vendor, their use or operation, infringe on a patent, copyright, trademark or violate a trade secret in the United States. The Vendor shall pay those costs and damages finally awarded or agreed in a settlement against the State in any such action. Such defense and payment shall be conditioned on the following:
 - i) That the Vendor shall be notified within a reasonable time in writing by the State of any such claim; and
 - ii) That the Vendor shall have the sole control of the defense of any action on such claim and all negotiations for its settlement or compromise provided, however, that the State shall have the option to participate in such action at its own expense.
- d) Vendor will not be required to defend or indemnify the State to the extent any claim by a third party against the State for infringement or misappropriation results solely from the State's material alteration of any Vendor-branded deliverables or Services, or from the continued use of the Services or other deliverables after receiving written notice from the Vendor of the claimed infringement.

12. ADVERTISING: Vendor agrees not to use the existence of the Contract or the name of the State of North Carolina as part of any commercial advertising or marketing of products or Services except as provided in 01 NCAC 05B.1516. A Vendor may inquire whether the State is willing to be included on a listing of its existing customers.

13. ACCESS TO PERSONS AND RECORDS:

- a) During, and after the term hereof during the relevant period required for retention of records by State law (G.S. 121-5, 132-1 *et seq.*, typically five years), the State Auditor and any Purchasing Agency's internal auditors shall have access to persons and records related to the Contract to verify accounts and data affecting fees or performance under the Contract, as provided in G.S. 143-49(9). However, if any audit, litigation or other action arising out of or related in any way to this project is commenced before the end of such retention of records period, the records shall be retained for one (1) year after all issues arising out of the action are finally resolved or until the end of the record retentions period, whichever is later.
- b) The following entities may audit the records of this contract during and after the term of the contract to verify accounts and data affecting fees or performance:
 - i. The State Auditor.
 - ii. The internal auditors of the affected department, agency or institution.
 - iii. The Joint Legislative Commission on Governmental Operations and legislative employees whose primary responsibility is to provide professional or administrative services to the Commission.
- c) The Joint Legislative Commission on Governmental Operations has the authority to:
 - i. Study the efficiency, economy and effectiveness of any non-State entity receiving public funds.
 - ii. Evaluate the implementation of public policies, as articulated by enacted law, administrative rule, executive order, policy, or local ordinance, by any non-State entity receiving public funds.
 - iii. Investigate possible instances of misfeasance, malfeasance, nonfeasance, mismanagement, waste, abuse, or illegal conduct by officers and employees of a non-State entity receiving, directly or indirectly, public funds, as it relates to the officer's or employee's responsibilities regarding the receipt of public funds.
 - iv. Receive reports as required by law or as requested by the Commission.

v. Access and review

- 1. Any documents or records related to any contract awarded by a State agency, including the documents and records of the contractor, that the Commission determines will assist in verifying accounts or will contain data affecting fees or performance; and
 - 2. Any records related to any subcontract of a contract awarded by a State agency that is utilized to fulfill the contract, including, but not limited to (i) records related to the drafting and approval of the subcontract, and (ii) documents and records of the contractor or subcontractor that the Commission determines will assist in verifying accounts or will contain data affecting fees or performance.
- d) The Joint Legislative Commission on Governmental Operations has the power to:
- i. Compel access to any document or system of records held by a non-State entity receiving, directly or indirectly, public funds, to the extent the documents relate to the receipt, purpose or implementation of a program or service paid for with public funds.
 - ii. Compel attendance of any officer or employee of any non-State entity receiving public funds, provided the officer or employee is responsible for implementing a program or providing a service paid for with public funds.
- e) Unless prohibited by federal law, the Commission and Commission staff in the discharge of their duties under this Article shall be provided access to any building or facility owned or leased by a non-State entity receiving public funds provided (i) the building or facility is used to implement a program or provide a service paid for with public funds and (ii) the access is reasonably related to the receipt, purpose, or implementation of a program or service paid for with public funds.
- f) Any confidential information obtained by the Commission shall remain confidential and is not a public record as defined in G.S. 132-1.
- g) Any document or information obtained or produced by Commission staff in furtherance of staff's duties to the Commission is confidential and is not a public record as defined in G.S. 132-1.
- h) A person who conceals, falsifies, or refuses to provide to the Commission any document, information, or access to any building or facility as required by this Article with the intent to mislead, impede, or interfere with the Commission's discharge of its duties under this Article shall be guilty of a Class 2 misdemeanor.

14. ASSIGNMENT OR DELEGATION OF DUTIES.

- a) As a convenience to the Vendor, the State may include any person or entity designated by the Vendor in writing as a joint payee on the Vendor's payment check. In no event shall such approval and action obligate the State to anyone other than the Vendor.
- b) If Vendor requests any assignment, or delegation of duties, the Vendor shall remain responsible for fulfillment of all Contract obligations. Upon written request, the State may, in its unfettered discretion, approve an assignment or delegation to another responsible entity acceptable to the State, such as the surviving entity of a merger, acquisition or a corporate reorganization if made as part of the transfer of all or substantially all of the Vendor's assets. 01 NCAC 05B.1507. Any purported assignment or delegation made in violation of this provision shall be void and a material breach of the Contract. G.S. 143-58.

15. INSURANCE: This section provides minimum insurance coverage rates that are applicable to most moderate risk solicitations. Agency Risk Analysis will determine if higher insurance coverage amounts are needed based on the likelihood and severity of exposure to the State. The analysis is documented in writing in the official file and considers the following non-exclusive factors:

- 1. Potential for damage to State property or property of a third party,

2. Potential for bodily injury to State employees or third parties,
3. Whether Vendor will transport State property, clients, or employees,
4. Use of a vehicle to accomplish the work or to travel to or from State locations,
5. Anticipated physical contacts of the Vendor with the State,
6. Anticipated number and activity of Vendor personnel within the State, and
7. Any other unique considerations that could result in harm, bodily injury, or property damage.

The Purchasing Agency has specified elsewhere in this Contract any increase in the minimum insurance coverage requirements below if the risk from the above factors is high.

a) REQUIREMENTS - Providing and maintaining adequate insurance coverage is a material obligation of the Vendor and is of the essence of the Contract. All such insurance shall meet all laws of the State of North Carolina. Such insurance coverage shall be obtained from companies that are authorized to provide such coverage and that are authorized by the NC Commissioner of Insurance to do business in North Carolina. The Vendor shall at all times comply with the terms of such insurance policies, and all requirements of the insurer under any such insurance policies, except as they may conflict with existing North Carolina laws or the Contract. The limits of coverage under each insurance policy maintained by the Vendor shall not be interpreted as limiting the Vendor’s liability and obligations or the indemnification requirements under the Contract. As provided above, a State agency is authorized, upon written evaluation and substantiation in the official file of the significant risk of bodily injury and/or property or other damage in the contract, to require and enforce higher coverage limits to mitigate the potential risk of liability to the State.

b) COVERAGE - During the term of the Contract, the Vendor at its sole cost and expense shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the Contract. At a minimum, the Vendor shall provide and maintain the following coverage and limits, subject to higher requirements by an agency after the risk analysis indicated above:

1. **For Small Purchases** as defined under North Carolina Administrative Code 01 NCAC 05A.0112 (35) and 05B.0301 (1), the minimum applicable insurance requirements for Worker’s Compensation and Automobile Liability will apply as required by North Carolina law. The Purchasing Agency may require Commercial General Liability coverage consistent with the assessed risks involved in the procurement.

2. **For Contracts valued in excess of the Small Purchase threshold, but up to \$1,000,000.00 the following limits shall apply:**

- i. **Worker’s Compensation** - The Vendor shall provide and maintain Worker’s Compensation Insurance, as may be required by the laws of North Carolina, as well as employer’s liability coverage, with minimum limits of \$250,000.00, covering all of Vendor’s employees who are engaged in any work under the Contract in North Carolina. If any work is sub-Contracted, the Vendor shall require the sub-contractor to provide the same coverage for any of its employees engaged in any work under the Contract within the State.
- ii. **Commercial General Liability** - General Liability Coverage on a Comprehensive Broad Form on an occurrence basis in the minimum amount of \$500,000.00 Combined Single Limit. Defense costs shall be in excess of the limit of liability.
- iii. **Automobile** - Automobile Liability Insurance, to include liability coverage covering all owned, hired and non-owned vehicles, used within North Carolina in connection with the Contract. The minimum combined single limit shall be \$250,000 bodily injury and property damage; \$250,000 uninsured/under insured motorist; and \$2,500 medical payment.

3. **For Contracts valued in excess of \$1,000,000 the following limits shall apply:**

- i. **Worker’s Compensation** - The Vendor shall provide and maintain Worker’s Compensation Insurance, as may be required by the laws of North Carolina, as well as employer’s liability

coverage, with minimum limits of \$500,000, covering all of Vendor's employees who are engaged in any work under the Contract in North Carolina. If any work is sub-Contracted, the Vendor shall require the sub-contractor to provide the same coverage for any of its employees engaged in any work under the Contract within the State.

- ii. **Commercial General Liability** - General Liability Coverage on a Comprehensive Broad Form on an occurrence basis in the minimum amount of \$1,000,000 Combined Single Limit. Defense costs shall be in excess of the limit of liability.
- iii. **Automobile** - Automobile Liability Insurance, to include liability coverage covering all owned, hired and non-owned vehicles, used within North Carolina in connection with the Contract. The minimum combined single limit shall be \$500,000 bodily injury and property damage; \$500,000 uninsured/under insured motorist; and \$5,000 medical payment.

16. GENERAL INDEMNITY:

- a) The Vendor shall indemnify, defend and hold and save the State, its officers, agents, and employees, harmless from liability of any kind, including all claims and losses accruing or resulting to any other person, firm, or corporation furnishing or supplying work, Services, materials, or supplies in connection with the performance of the Contract, and also from any and all claims and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the Vendor in the performance of the Contract that are attributable to the negligence or intentionally tortious acts of the Vendor, provided that the Vendor is notified in writing within 30 days from the date that the State has knowledge of such claims.
- b) The Vendor, at its own expense shall defend any action brought against the State, under this section. The Vendor shall have the sole control of the defense of any action on such claim and all negotiations for its settlement or compromise, provided, however, that the State shall have the option to participate in such action at its own expense.
- c) The Vendor represents and warrants that it shall make no claim of any kind or nature against the State's agents who are involved in the delivery or processing of Vendor deliverables or Services to the State.
- d) As part of this provision for indemnity, if federal funds are involved in this procurement, the Vendor warrants that it will comply with all relevant and applicable federal requirements and laws, and will indemnify, defend and hold and save the State harmless from any claims or losses resulting to the State from the Vendor's noncompliance with such federal requirements or law in the performance of this Contract. The representations and warranties in the preceding two sentences shall survive the termination or expiration of the Contract.
- e) The State does not participate in indemnification due to Constitutional restrictions, or arbitration, which effectively and unacceptably waives jury trial. See, G.S. 22B-3, -10.

17. ELECTRONIC PROCUREMENT:

- a) Purchasing shall be conducted through the Statewide E-Procurement Service. The State's third-party agent shall serve as the Supplier Manager for this E-Procurement Service. The Vendor shall register for the Statewide E-Procurement Service within two (2) business days of notification of award in order to receive an electronic purchase order resulting from award of this Contract.
- b) RESERVED. The Supplier Manager will capture an order from a State approved user, including the shipping and payment information, and submit the order in accordance with E-Procurement Service procedures. Subsequently, the Supplier Manager will send those orders to the appropriate Vendor on State Contract. The State or State-approved user, not the Supplier Manager, shall be responsible for the solicitation, bids received, evaluation of bids received, award of Contract, and the payment for goods delivered.

c) Vendor shall at all times maintain the confidentiality of its username and password for the Statewide E-Procurement Services. Vendor shall be responsible for all activity and all charges by its agents or employees. Vendor agrees not to permit a third party to use its E-Procurement Services account. If there is a breach of security through the Vendor's account, Vendor shall immediately change its password and notify the Supplier Manager of the security breach by email. Vendor shall cooperate with the State and the Supplier Manager to mitigate and correct any security breach.

18. SUBCONTRACTING: The Vendor may subcontract the performance of required Services under the Contract. Upon request, Vendor shall identify its subcontractors to the State; identify any financial interest it has in any subcontractor to the State; and/or provide the State with complete copies of any agreements made by and between Vendor and any subcontractors. The Vendor remains solely responsible for the performance of its subcontractors. Subcontractors shall adhere to all applicable requirements, terms, and conditions set forth in this Contract and the subsequent Scope of Work/Task Order. It may be required as a condition of award that an authorized officer or agent of a subcontractor sign a statement to the effect that the subcontractor has read, and will agree to abide by, Vendor's obligations under any contract awarded pursuant to this Solicitation. Any contracts made by the Vendor with a subcontractor shall include an affirmative statement that the State is an intended third party beneficiary of the Agreement; that the subcontractor has no agreement with the State; and that the State shall be indemnified by the Vendor for any claim presented by the subcontractor. Notwithstanding any other term herein, Vendor shall timely exercise its contractual remedies against any non-performing subcontractor and, when appropriate, substitute another subcontractor. **CONFIDENTIALITY:** Vendor information that cannot be shown to be, e.g., a trade secret, may be subject to public disclosure under the terms of the State Public Records Act (SPRA), beginning at G.S. 132.1. Blanket assertions of confidentiality are not favored, but confidentiality of specific material meeting one or more exceptions in the SPRA will be honored. Vendors are notified that if the confidentiality of material is challenged by other parties, the Vendor has the responsibility of defending the assertion of confidentiality. G.S. 143-52(a).

19. CARE OF STATE DATA AND PROPERTY: Any State property, information, data, instruments, documents, studies or reports given to or prepared or assembled by or provided to the Vendor under the Contract shall be kept as confidential, used only for the purpose(s) required to perform the Contract and not divulged or made available to any individual or organization without the prior written approval of the State.

The State's data and property in the hands of the Vendor shall be protected from unauthorized disclosure, loss, damage, destruction by a natural event or another eventuality. The Vendor agrees to reimburse the State for loss or damage of State property while in Vendor's custody. Such State Data shall be returned to the State in a form acceptable to the State upon the termination or expiration of this Agreement.

The Vendor shall notify the State of any security breaches within 24 hours as required by G.S. 143B-1379. For further information, see, G.S. 75-60 *et seq.* **Notice** is given to the Vendor that the NC Department of Information Technology (DIT) has requirements relating to the security of the State network, and rules relating to the use of the State network, IT software and equipment, that the Vendor must comply with, as applicable. See, e.g., G.S. 143B-1376.

20. OUTSOURCING: Any Vendor or subcontractor providing call or contact center services to the State of North Carolina or any of its agencies shall disclose to inbound callers the location from which the call or contact center services are being provided.

If, after award of a Contract, and consistent with any applicable NC DIT security provisions, the Contractor wishes to relocate or outsource any portion of performance to a location outside the United States, or to Contract with a subcontractor for any such performance, which subcontractor and nature of the work has not previously been disclosed to the State in writing, prior written approval must be obtained from the State Purchasing Agency. Vendor shall give notice to the Purchasing Agency of any relocation of the Vendor, employees of the Vendor, subcontractors of the Vendor, or other persons providing performance under a State Contract to a location outside of the United States. See, G.S. 143-59.4.

- 21. **ENTIRE AGREEMENT:** The Contract (including any documents mutually incorporated specifically therein) resulting from a relevant solicitation represents the entire agreement between the parties and supersedes all prior oral or written statements or agreements. All promises, requirements, terms, conditions, provisions, representations, guarantees, and warranties contained herein shall survive the Contract expiration or termination date unless specifically provided otherwise herein, or unless superseded by applicable Federal or State statutes of limitation.
- 22. **ELECTRONIC RECORDS:** The State will digitize all Vendor responses to the relevant solicitation, if not received electronically, as well as any awarded Contract together with associated procurement-related documents. These electronic copies shall constitute a preservation record and shall serve as the official record of this procurement with the same force and effect as the original written documents comprising such record. Any official electronic copy, printout or other output readable by sight shown to reflect such record accurately shall constitute an "original."
- 23. **AMENDMENTS:** This Contract may be amended only by a written amendment duly executed by the State and the Vendor.
- 24. **NO WAIVER:** Notwithstanding any other language or provision in the Contract or in any Vendor-supplied material, nothing herein is intended nor shall be interpreted as a waiver of any right or remedy otherwise available to the State under applicable law. The waiver by the State of any right or remedy on any one occasion or instance shall not constitute or be interpreted as a waiver of that or any other right or remedy on any other occasion or instance.
- 25. **FORCE MAJEURE:** Neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations as a result of events beyond its reasonable control, including, without limitation, fire, power failures, any act of war, hostile foreign action, nuclear explosion, riot, strikes or failures or refusals to perform under subcontracts, civil insurrection, earthquake, hurricane, tornado, other catastrophic epidemic or pandemic, natural event or Act of God.
- 26. **SOVEREIGN IMMUNITY:** Notwithstanding any other term or provision in the Contract, nothing herein is intended nor shall be interpreted as waiving any claim or defense based on the principle of sovereign immunity or other State or federal constitutional provision or principle that otherwise would be available to the State under applicable law.

27. FEDERAL FUNDS PROVISIONS

To the extent applicable and absent stricter or controlling State provisions, the following federal provisions (in addition to the North Carolina General Terms and Conditions above) apply consistent with Uniform Guidance in 2 C.F.R. § 200.326 and 2 C.F.R. Part 200, and its Appendix II and HUD requirements. Relevant federal authorities may require additional provisions depending on the scope and context of the Contract. Failure or unwillingness of the Vendor to continually meet any of these requirements, as applicable, may result in Contract termination.

Any links to websites not maintained by the State are provided as a courtesy. The State does not warrant or guarantee the accuracy of the hyperlink or the information contained therein.

- a) **No governmental non-competes.** Vendor shall not impose or enforce any non-competition agreement upon the employees included in Vendor’s bid that would prevent those employees from accepting any offer of employment from the State of North Carolina outside of the first Term of the Contract. By executing this Contract, the Vendor affirms this condition. This affirmation is a material condition for the State’s award of any work under this Contract.
- b) **Program Monitoring.** Vendor agrees to assist and cooperate with the Federal grantor or funding agency and the relevant Purchasing Agency or their duly designated representatives in the monitoring of the project or projects to which this Contract relates, and to provide in form and manner approved by the Purchasing Agency such monitoring reports, progress reports, and the like as may be required and to provide such reports at the times specified.

- c) **Remedies and Termination**, For purposes of this section the State Remedies and Termination provisions above apply as written.
- d) **Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).**

Compliance with the Contract Work Hours and Safety Standards Act.

1. *Overtime requirements.* No Vendor or subcontractor contracting for any part of the Contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.
2. *Violation; liability for unpaid wages; liquidated damages.* In the event of any violation of the clause set forth in 29 C.F.R. §5.5(b)(1) the Vendor and any subcontractor responsible therefor shall be liable for the unpaid wages. In addition, such Vendor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in 29 C.F.R. §5.5(b)(1), in the sum of \$33 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in 29 C.F.R. §5.5(b)(1).
3. *Withholding for unpaid wages and liquidated damages.* The Purchasing Agency shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the Vendor or subcontractor under any such contract or any other Federal contract with the same prime Vendor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime Vendor, such sums as may be determined to be necessary to satisfy any liabilities of such Vendor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in 29 C.F.R. §5.5(b)(2).
4. *SubContracts.* The Vendor or subcontractor shall insert in any subcontracts the clauses set forth in paragraph (b)(1) through (4) of 29 C.F.R. §5.5 and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime Vendor shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in 29 C.F.R. §5.5(b)(2) through (4).

- e) **CLEAN AIR ACT AND THE FEDERAL WATER POLLUTION CONTROL ACT.**

Clean Air Act

1. The Vendor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act, as amended, 42 U.S.C. § 7401 et seq.
2. The Vendor agrees to report each violation to the Purchasing Agency and understands and agrees that the Purchasing Agency will, in turn, report each violation as required to assure notification to the Federal Emergency Management Agency, and the appropriate Environmental Protection Agency Regional Office.
3. The Vendor agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance.

Federal Water Pollution Control Act

1. The Vendor agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Federal Water Pollution Control Act, as amended, 33 U.S.C. 1251 et seq.
2. The Vendor agrees to report each violation to the Purchasing Agency and understands and agrees that the Purchasing Agency will, in turn, report each violation as required to assure notification to the federal

agency providing funds hereunder, and the appropriate Environmental Protection Agency Regional Office.

3. The Vendor agrees that these requirements will be included in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance.

f) Debarment and Suspension.

1. This Contract, if federal funding is used, is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3000. As such, the Vendor is required to verify that none of the Vendor’s principals (defined at 2 C.F.R. § 180.995) or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).
2. The Vendor must comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C, and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.
3. This certification is a material representation of fact relied upon by a federal agency providing federal funds herein and the Purchasing Agency. If it is later determined that the Vendor did not comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C, in addition to remedies available to federal agency providing federal funds herein and the Purchasing Agency, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment.
4. The Vendor agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C while this offer is valid and throughout the period of the Contract resulting from a relevant solicitation herein. The Vendor further agrees to include a provision requiring such compliance in its lower tier covered transactions.

g) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) (as Amended).

Vendors that apply or bid for an award of \$100,000 or more shall submit the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, officer or employee of Congress, or an employee of a Member of Congress in connection with obtaining any Federal Contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient who in turn will forward the certification(s) to the awarding agency.

Required Certification. Vendors must sign and submit to the Purchasing Agency the certification attached hereto as Attachment F and, if applicable, complete the disclosure form in Attachment G. See the latest version of “Certification for Contracts, Grants, Loans, and Cooperative Agreements” found at <https://ncadmin.nc.gov/documents/vendor-forms>.

h) Procurement of Recovered Materials.

1. Unless specified otherwise in the Contract, in the performance of this Contract, the Vendor shall make maximum use of products containing recovered materials that are EPA-designated items unless the product cannot be acquired:
 - Competitively within a timeframe providing for compliance with the Contract performance schedule;
 - Meeting Contract performance requirements; or
 - At a reasonable price.
2. Information about this requirement, along with the list of EPA designated items, is available at EPA’s Comprehensive Procurement Guidelines web site: <https://www.epa.gov/smm/comprehensive-procurement-guideline-cpg-program>.

3. The Vendor also agrees to comply with all other applicable requirements of Section 6002 of the Solid Waste Disposal Act.”
- i) **Access to Records.** In addition to the North Carolina General Contract Terms & Conditions section entitled “ACCESS TO PERSONS AND RECORDS” included in this Contract, the following access to records requirements apply to this Contract:
1. The Vendor agrees to provide the Purchasing Agency, the Administrator of the federal agency providing funds hereunder, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Vendor which are directly pertinent to this Contract for the purposes of making audits, examinations, excerpts, and transcriptions.
 2. The Vendor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.
 3. The Vendor agrees to provide the Administrator of the federal agency providing funds hereunder or his authorized representative access to construction or other work sites pertaining to the work being completed under the Contract.
 4. In compliance with the Disaster Recovery Act of 2018, the Purchasing Agency and the Vendor acknowledge and agree that no language in this Contract is intended to prohibit audits or internal reviews by the Administrator of the federal agency providing funds hereunder or the Comptroller General of the United States.
- j) **Modifications to Contract.** Modifications to the Contract are governed by the North Carolina General Contract Terms & Conditions section above entitled “AMENDMENTS,” except as approval and signature by any federal official may also be required.
- k) **Records Retention.** All records required to be kept on the project shall be maintained for at least eight (8) years after final payments and until all other pending matters under the grant for this project have been closed. However, if any audit, litigation or other action arising out of or related in any way to this project is commenced before the end of the eight (8) year period, the records shall be retained for one (1) year after all issues arising out of the action are finally resolved or until the end of the eight (8) year period, whichever is later.
- l) **Energy Efficiency.** All participants in the projects funded hereby shall recognize mandatory standards and policies relating to energy efficiency, which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (PL 94-163).
- m) **Program Fraud and False or Fraudulent Statements or Related Acts.** Vendor acknowledges that 31 U.S.C. Chapter 38 (Administrative Remedies for False Claims and Statements) applies to its actions pertaining to the Contract.
- n) **No Obligation by Federal Government.** The Federal Government is not a party to this Contract and is not subject to any obligations or liabilities to the non-Federal entity, Vendor, or any other party pertaining to any matter resulting from the Contract.
- o) **Compliance with Federal Law, Regulations, and Executive Orders.** This is an acknowledgement that federal financial assistance will be used to fund all or a portion of the Contract. The Vendor will comply with all applicable Federal law, regulations, executive orders, the policies of the federal agency(ies) providing funding, procedures, and directives.
- p) **Federal Seals, Logos, and Flags.** In addition to the prohibitions of the North Carolina General Contract Terms & Conditions section above entitled “ADVERTISING,” the Vendor shall not use the seal(s), logos, crests, or reproductions of flags of a federal agency providing funding herein, or likenesses of federal agency officials without specific pre-approval of the relevant federal agency.
- q) **System for Awards Management.** Vendor shall be responsible to ensure that it has checked the federal

System for Awards Management (SAM) <https://www.sam.gov/SAM> and the State Debarred Vendors Listing, <https://ncadmin.nc.gov/documents/nc-debarred-vendors> to verify that Contractors or sub-Recipients have not been suspended or debarred from doing business with federal or State government.

r) **Section 3 Clause.** Vendor will comply with the following clauses from 24 CFR 135.38:

The Contractor shall comply with the provisions of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 USC 1701u, and implementing its regulations at 24 CFR Part 75, as expressed below:

1. The work to be performed under this contract is subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended by the Housing and Community Development Act of 1992 (Section 3). The purpose of Section 3 is to ensure that employment and other economic opportunities generated by HUD assistance or HUD-assisted projects covered by Section 3, shall, to the greatest extent feasible, be directed to low- and very low-income persons, particularly persons who are recipients of HUD assistance for housing.
2. The parties to this contract agree to comply with HUD's regulations in 24 CFR Part 75, which implement Section 3. As evidenced by their execution of this contract, the parties to this contract certify that they are under no contractual or other impediment that would prevent them from complying with the part 75 regulations.
3. The contractor agrees to send to each labor organization or representative of workers with which the contractor has a collective bargaining agreement or other understanding, if any, a notice advising the labor organization or workers' representative of the contractor's commitments under this Section 3 clause, and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall describe the Section 3 preference, shall set forth minimum number and job titles subject to hire, availability of apprenticeship and training positions, the qualifications for each; and the name and location of the person(s) taking applications for each of the positions; and the anticipated date the work shall begin.
4. The contractor agrees to include this Section 3 clause in every subcontract subject to compliance with regulations in 24 CFR Part 75, and agrees to take appropriate action, as provided in an applicable provision of the subcontract or in this Section 3 clause, upon a finding that the subcontractor is in violation of the regulations in 24 CFR Part 75. The contractor will not subcontract with any subcontractor where the contractor has notice or knowledge that the subcontractor has been found in violation of the regulations in 24 CFR Part 75.
5. The contractor will certify that any vacant employment positions, including training positions that are filled (1) after the contractor is selected by before the contract is executed, and (2) with persons other than those to whom the regulations of 24 CFR part 75 require employment opportunities to be directed, were not filled to circumvent the contractor's obligations under 24 CFR part 75.
6. Noncompliance with HUD's regulations in 24 CFR part 75 may result in sanctions, termination of this contract for default, and debarment or suspension from future HUD assisted contracts.
7. With respect to work performed in connection with Section 3 covered Indian housing assistance, section 7(b) of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450e) also applies to the work to be performed under this contract. Section 7(b) requires that to the greatest extent feasible (i) preference in the award of contracts and subcontracts shall be given to Indian organizations and Indian-owned Economic Enterprises. Parties to this contract that are subject to the provisions of Section 3 and Section 7(b) agree to comply with Section 3 to the maximum extent feasible, but not in derogation of compliance with Section 7(b).

- s) **Non-Discrimination.** Vendor will comply with all Federal statutes relating to non-discrimination. These include but are not limited to:
1. Title VI of the Civil Rights Act of 1964 (42 U.S.C 2000(d)) and implementing regulations (24 CFR part 1), which provide that no person in the United States shall, on the grounds of race, color or national origin, be excluded from participation in, be denied the benefits of, or otherwise be subject to discrimination under any program or activity that receives Federal financial assistance.
 2. Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), as amended, and implementing regulations at 24 CFR part 8, the American Disabilities Act (42 U.S.C. §§ 12101 et.seq.), and implementing regulations at 28 CFR part 35 or 36, as applicable, and the Age Discrimination Act of 1975 (42 U.S.C. §§ 6101-6107) as amended, and implementing regulations at 24 CFR part 146, which together provide that no person in the United States shall, on the grounds of disability or age, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity that receives Federal financial assistance.
 3. The Fair Housing Act (42 U.S.C. 3601- 19), as amended, and the implementing regulations at 24 CFR part 100, which prohibit discrimination in housing on the basis of race, color, religion sex (including gender identity and sexual orientation), disability, familial status, or national origin and will affirmatively further fair housing, will apply.
 4. Title IX of the Education Amendments of 1972, as amended (20 USC §§ 1681 – 1683, and 1685-1686), which prohibits discrimination on the basis of sex.
 5. The Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended relating to nondiscrimination on the basis of drug abuse.
 6. The Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism.
 7. §§ 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C §§ 290 dd-3 and 290 ee 3), as amended, relating to confidentiality of alcohol and drug abuse patient records.
 8. Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental, or financing of housing.
 9. Any other applicable Federal nondiscrimination requirements, including those listed at 24 CFR §§ 5.105(a) and 5.106 as applicable.
- t) **URA.** The acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended (42 U.S.C. 4601) and implementing regulations at 49 CFR part 24 and, as applicable, Section 104(d) of the Housing and Community Development Act of 1974 (42 U.S.C. 5304(d)) and implementing regulations at 24 CFR part 42, subpart A, will apply.
- u) **National Environmental Policy Act.** The environmental requirements of the National Environmental Policy Act (42 U.S.C. 4321 et.seq.) and related Federal authorities prior to the commitment or expenditure of funds for property will apply.
- v) **Plans, supervision, and reports.** Vendor will comply with HUD requirements with regard to the drafting, reviewing and approval of construction plans and specifications. Vendor will provide and maintain competent and adequate engineering supervision at the construction site to ensure that the complete work conforms with the approved plans and specifications and will furnish progressive reports and such other information as may be required by HUD or the State.
- w) **Davis-Bacon Act.** Vendor will comply with the David-Bacon Act, as amended (40 U.S.C. 3141-3148), if required by the federal program legislation, in Construction contracts involving an excess of \$2000, and

subject to any other federal program limitations, all laborers and mechanics must be paid at a rate not less than those determined by the Secretary of Labor to be the prevailing wages. These wage rates are a federally mandated minimum only, and will be superseded by any State or local requirement mandating higher wage rates. Vendor also agrees to comply with Department of Labor Regulations pursuant to the Davis-Bacon Act found in 29 CFR Parts 1, 3, 5 and 7 which enforce statutory labor standards provisions. Wage determinations are available at <https://sam.gov/wage-determinations>.

- x) **Lead Based Paint.** Vendor will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§ 4801 et seq.), which prohibits the use of lead-based paint in construction or rehabilitation of residence structures, and HUD's lead based paint regulations at 24 CFR Part 35.
- y) **Copeland Act.** Vendor will comply, as applicable, with the Copeland Act (40 U.S.C. §§ 276c and 18 U.S.C. §874).
- z) **Environmental.** Vendor will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91- 190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
- aa) **Wild and Scenic Rivers Act of 1968.** Vendor will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
- bb) **Preservation.** Vendor will assist HUD and the State in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq).
- cc) **Audits.** Vendor will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and 2 CFR Part 200 Subpart F Audit Requirements.

ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION

The State is committed to retaining Vendors from diverse backgrounds, and it invites and encourages participation in the procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. In particular, the State encourages participation by Vendors certified by the State Office of Historically Underutilized Businesses, as well as the use of HUB-certified vendors as subcontractors on State contracts.

Historically Underutilized Businesses (HUBs) consist of minority, women and disabled business firms that are at least fifty-one percent owned and operated by an individual(s) of the categories. Also included in this category are disabled business enterprises and non-profit work centers for the blind and severely disabled.

Pursuant to G.S. 143B-1361(a), 143-48 and 143-128.4, the State invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. This includes utilizing subcontractors to perform the required functions in this RFP. Any questions concerning NC HUB certification, contact the [North Carolina Office of Historically Underutilized Businesses](#) at (919) 807-2330. The Vendor shall respond to question a) and b) below.

a) Is Vendor a Historically Underutilized Business? Yes No

b) Is Vendor Certified with North Carolina as a Historically Underutilized Business? Yes No

ATTACHMENT F: CERTIFICATION FOR CONTRACTS, GRANTS, LOANS AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal Contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and Contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Vendor, _____, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Vendor understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

Signature of Vendor's Authorized Official

Name and Title of Vendor's Authorized Official

Date

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

The Disclosure of Lobbying Activities form, is located at <https://www.doa.nc.gov/pandc/onlineforms/pc-omb-standard-form-III-72020-pdf/open>. If applicable, download and attach the completed form with Vendor's response to this Solicitation.

ATTACHMENT H: EXPERIENCE

Complete one form for each of at least three (3) examples of projects delivered. More examples may be provided.

Example 1	
Client Name:	
Program:	
Brief Description of Services Rendered:	

Example 2	
Client Name:	
Program:	
Brief Description of Services Rendered:	

Example 3	
Client Name:	
Program:	
Brief Description of Services Rendered:	

OFFER CHECKLIST

Vendors shall be deemed non-responsive and their offer not considered for any one of the following:

- Late Offer
- Failure to submit all required Financial Information (see Section 4.11)
- Failure to sign the offer
- Failure to submit pricing
- Engaging in prohibited communications (see Section 3.2)

Offer Checklist:

1. Signed Offer. Submit the complete RFP, not just the signature page.
2. Signed Addenda, if any.
3. Statement of Qualifications (see Section 2.7), including a title page, table of contents, narrative response, resumes and bios, and examples of prior work (Attachment H).
4. Financial Documentation (see Section 4.11).
5. Attachment A: Task Order Categories. Identify categories for which you are bidding and the corresponding pricing.
6. Attachment D: Location of Workers Utilized by Vendor.
7. Attachment E: HUB Supplemental Vendor Information.
8. Signed Attachment F: Certification for Contracts, Grants, Loans, and Cooperative Agreements.
9. Signed Attachment G, if applicable: Disclosure of Lobbying Activities (OMB Standard Form LLL)
10. Attachment H: Experience.
11. Redacted version of the proposal labeled with the word REDACTED in document name (see Section 2.6).
12. List of Errata and Exceptions, if any (see Section 2.3).

*Please review Section 3.4, Evaluation Criteria, to ensure all criteria have been addressed in your proposal.

This Offer Checklist is provided as a courtesy, but the Vendor is solely responsible for ensuring all requested and required information is submitted.

2.2 Signed Addenda

Addendum 1_Staff Augmentation_Questions and Answers (released on August 26, 2025) is provided below.
Addendum 2_Staff Aug_Clarification (released on September 8, 2025) is not provided due to "This Addendum does not need to be returned" note stated by North Carolina within the Addendum.



BID ADDENDUM

August 26, 2025

FAILURE TO RETURN THIS ADDENDUM MAY SUBJECT YOUR BID TO REJECTION

Solicitation Number	Doc1677946894
Solicitation Description	Staff Augmentation
Addendum Number	1

Solicitation Opening has been extended to **September 11, 2025**.
Submit proposals **BEFORE 2:00 pm ET (by 1:59:59)**.

CHANGE TO SOLICITATION:

- Section 4.3 PAYMENT STRUCTURE** has been amended to read:
Payment will be a ~~fixed~~ fee not-to-exceed for services based on the scope of work for each task order.
- Attachment C: North Carolina General Contract Terms and Conditions 2(b)** is stricken as written in the original solicitation and is hereby replaced with the following language:

If, through any cause, Vendor shall fail to fulfill in a timely and proper manner the obligations under the Contract, including, without limitation, in these North Carolina General Terms and Conditions, the State shall have the right to terminate the Contract by giving ten days written notice to the Vendor and specifying the effective date thereof. In that event, any or all finished or unfinished deliverables that are prepared by the Vendor under the Contract shall, at the option of the State, become the property of the State (and under any applicable Vendor license to the extent necessary for the State to use such property), and the Vendor shall be entitled to receive just and equitable compensation for any acceptable deliverable completed (or partially completed at the State's option) as to which such option is exercised. Notwithstanding, Vendor shall not be relieved of liability to the State for damages sustained by the State by virtue of any breach of the Contract, and the State may withhold any payment due the Vendor for the purpose of setoff until such time as the exact amount of damages due the State from such breach can be determined. The State, if insecure as to receiving proper performance or provision of goods deliverables, or if documented Vendor Services performance issues exist, under this Contract, may require at any time a

performance bond or other alternative performance guarantees from a Vendor without expense to the State as provided by applicable law. G.S. 143-52(a); 01 NCAC 05B.1521; G.S. 25-2-609.

If this Contract contemplates deliveries or performance over a period of time, the State may terminate this Contract for convenience at any time by providing 30 days’ notice in writing from the State to the Vendor. In that event, any or all finished or unfinished deliverables prepared by the Vendor under this Contract shall, at the option of the State, become its property, and under any applicable Vendor license and permits to the extent necessary for the State to use such property. If the Contract is terminated by the State for convenience, the State shall pay for those items or Services for which such option is exercised, less any payment or compensation previously made.

RESPONSE TO QUESTIONS:

State’s Responses to Questions Received by the due date and time of August 18, 2025, by 5:00 pm ET. The Question appears exactly as submitted by the Vendor.

	CITATION	VENDOR QUESTION	DCR RESPONSE
1	5.2.7 – Task 7: Needs Assessments, Market Analysis, and Geospatial Support; 5.2.8 – Task 8: Program Performance Monitoring and Evaluation	May vendors include nonbinding annexes (e.g., sample dashboards or geospatial maps) to illustrate technical approach for Tasks 7 and 8, or should responses remain narrative only?	Samples are acceptable.
2	5.1 General (SOR)	For the System of Record (SOR) referenced, does DCR anticipate a required integration with HUD DRGR , or will DRGR be operated separately alongside the SOR?	No, DRGR will be separate from the SOR.
3	4.5 HUB Participation; Attachment E – HUB Information	To confirm: will a woman-owned prime (not HUB-certified) partnering with certified HUB subcontractors be recognized as meeting the State’s 10% HUB utilization goal ?	The minority participation goal is for state construction projects for state-owned buildings (N.C.G.S. 143-128.2). Outside of state construction, the state has a policy of encouraging and promoting the use of small, minority, and women-owned businesses (see N.C.G.S. 143-48) but it is not a criterion for award.
4	5.1 General (staffing & hours)	Will remote or hybrid staffing be acceptable if we maintain weekday 8:00 a.m.–5:00 p.m. ET coverage and comply with any required in-person roles?	As described in the RFP, DCR may require in-person roles depending upon program needs. Virtual or hybrid will not meet the in-person requirement for those roles determined to be in-

Addendum 1_Staff Augmentation

			person. In-person needs will be identified in each task order.
5	4.6 Background Checks	Are specific background checks required (e.g., SBI, CJIS, fingerprinting), or will standard vendor HR screenings suffice unless otherwise requested?	Standard HR screenings will suffice unless otherwise requested based on specific needs. Additional background checks may be required for in-person roles.
6	4.2 Pricing; Attachment A – Task Order Categories / Pricing	For pricing, may vendors propose category specific position titles and rates (i.e., rates can differ by Task Order category), provided all rates are not to exceed and inclusive of expenses?	Yes.
7	2.7 Proposal Contents Narrative Response: Vendor Qualifications and Approach Page No: 10	Is it mandatory, the Vendor should meet the Relevant experience with HUD-funded programs (e.g., CDBG-DR, CDBG-MIT, HOME, ESG) or other disaster recovery work as an eligibility to submit the bid	Vendors will not be disqualified for lack of experience, so a bid could be evaluated even without relevant experience. Experience is an important criterion, and lack of experience would be considered a weakness in the evaluation and might result in the vendor not being placed on the contract at all or for a particular task.
8	2.7 Proposal Contents Narrative Response: Vendor Qualifications and Approach Page No: 10	Can CDBG-DR confirm if vendors without experience in HUD-funded programs or other disaster recovery work, may still be considered to bid if they demonstrate strong qualifications in other areas?"	Yes, vendors without experience in HUD-funded programs may still be considered for a bid.
9	No reference citation provided by the Vendor.	Is there an existing incumbent vendor or vendor pool currently providing staff augmentation services for the CDBG-DR program?	Not for the NC Department of Commerce’s CDBG-DR programs.
10	No reference citation provided by the Vendor.	Can DCR confirm whether there is a minimum number of personnel the vendors required to propose for each task order category	There are no minimums.
11	2.6 RFP Submittal Page No: 9	Will the Department require both electronic submission through eProcurement <i>and</i> a hard copy, or is electronic submission alone sufficient?	Electronic submission alone is sufficient.

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12	No reference citation provided by the Vendor.	Could DCR please provide more insights regarding vendors may propose staffing levels (labor categories) based on their approach and capacity to meet each task order category?	Based on their experiences with HUD and/or disaster recovery work, vendors should propose how they would staff each task.
13	2.7 Proposal Contents Examples Page No: 10	For Attachment H, are all example projects required to be related specifically to HUD-funded programs and disaster recovery work, or may we include other relevant staffing engagements that demonstrate comparable scope and complexity?	Other relevant staffing engagements are acceptable, though more comparable experience may receive a stronger evaluation.
14	2.7 Proposal Contents Resumes Page No: 10	Can DCR confirm whether it is mandatory to submit minimum of two resumes for all proposed staff for each proposed position or labor category?	It is not mandatory but encouraged for key personnel.
15	No reference citation provided by the Vendor.	Can you confirm whether vendors must be registered with the State of North Carolina at the time of proposal submission?	Vendors do not have to have a Certificate of Authority to Transact Business in NC at the time of submission, but they will be required to obtain one upon contract.
16	No reference citation provided by the Vendor.	Is business registration is required upon award of a contract?	Yes, a Certificate of Authority to Transact Business in North Carolina from the NC Secretary of State's Office is required upon award of a contract.
17	Attachment B North Carolina Instructions to Vendors	Could you please confirm the bid opening date and advise when and where the bid tabulation results will be made available for public viewing?	Per this Addendum the solicitation opening date has been extended to September 11, 2025. Submit proposals by September 11, 2025, BEFORE 2:00 pm ET (by 1:59:59). Per ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS, paragraph 26 TABULATIONS, " <i>Bid tabulations can be electronically retrieved at the Electronic Vendor Portal (eVP), https://evp.nc.gov</i> ".
18	2.7 Proposal Contents Resumes	Can we submit sample resumes instead of actual staff resumes?	This is not prohibited but may receive a weaker evaluation, as

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	Page No: 10		DCR will not be able to determine actual experience. Sample resumes should be identified as such.
19	2.7 Proposal Contents Examples Page No: 10	For the experience requirements outlined in the RFP, can project examples from subcontractors be included in the proposal, or must all examples reflect the direct past performance of the prime contractor?	Project examples from subcontractors may be included and should be identified as such.
20	2.6 Reference: Section RFP Submittal, Page no: 9	Is there a maximum file size limit for electronic proposal submissions through eProcurement Sourcing?	The file size limit is 100MB. If Vendor response is greater than 100MB Vendors are allowed to "ZIP" the file and upload a zip file. The State must be able to open any file submitted. Per the RFP, " Questions or issues related to using eProcurement Sourcing must be directed to the eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET ".
21	Offer Checklist Page no: 60	Should the attachments be included within the Technical Proposal?	The entire offer, one (1) pdf file, should be uploaded in eProcurement Sourcing in Section 5.1 VENDOR OFFER.
22	Offer Checklist Page no: 60	Should the attachments be submitted as separate files?	The attachments should not be submitted as separate files.
23	4.5 Hub Participation Page no: 16	Is it mandatory for the vendor to meet the 10% HUB participation goal	No. See response to Question #3.
24	No reference citation provided by the Vendor.	Will the vendor's resources be required to work on-site?	Some personnel may be required to work on-site, depending on the task order.
25	No reference citation provided by the Vendor.	Will the vendor's resources be required to work on-site, remotely, or a combination of both?	Depending on the task order, some personnel may be required to work on-site; others will be able to work remotely.
26	5.2.16 Technical Systems Specification & Project Management Page No: 23	Will the vendor be required to provide actual IT development/configuration, or only project management and system specification support?	Only project management system specification support. DCR has issued a separate procurement for a grants management system.

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27	4.3 Payment Structure Page No: 15	Payment is stated as a “fixed fee per task order.” Can you clarify how this aligns with Attachment A’s hourly rate structure? Should vendors present max hourly rates only, with task order pricing later converted into fixed fees?	See clarification at the top of this addendum. Payment will be a NOT-TO-EXCEED amount for services based on the scope of work for each task order.
28	1.0 Purpose and Background (p. 6); 3.1 Method of Award (p. 11–12)	Can the State clarify how many vendors it intends to pre-qualify under this pool, and whether there is a target number of awards and contract value?	The number of prequalified vendors may vary by task and will depend on the applicant pool. The State does not have a target number at this time.
29	2.4 RFP Schedule (p. 8)	We respectfully request a one- to two-week extension to the current proposal submission deadline of September 4, 2025 for Staff Augmentation, Community Development Block Grant-Disaster Recovery, Expert Administrative Support, RFP # Doc1677946894. Due to the complexity and level of detail required, additional time would enable our team to prepare a thorough and high-quality response that fully aligns with the objectives and expectations outlined in the solicitation.	Per this Addendum the solicitation opening date has been extended to September 11, 2025. Submit proposals by September 11, 2025, BEFORE 2:00 pm ET (by 1:59:59).
30	5.3 Task Order Methodology (p. 24)	Will all pre-qualified vendors be invited to respond to each task order, or will DCR use a rotation, shortlisting, or limited competition approach?	The State does not have any information to add to Section 5.3 Task Order Methodology at this time.
31	5.3 Task Order Methodology (p. 24)	Will task order awards be based solely on the hourly rates in Attachment A, or can vendors propose reduced rates or discounts when competing for individual task orders?	Task order awards will not be based solely on hourly rates. Please see the description in Section 5.3 regarding best value. Reduced rates may be acceptable, but the State encourages vendors to submit their best rate in response to this RFP.
32	4.2 Pricing (p. 15); Attachment A (p. 27–28)	The RFP states that hourly rates must be “inclusive of salary, overhead, administrative and other similar fees, travel and other expenses.” Can the State	Travel should be included in the hourly rates and will not be reimbursed separately.

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		confirm that no separate travel reimbursement will be permitted under task orders?	
33	4.2 Pricing (p. 15); Attachment A (p. 27–28)	Are vendors permitted to propose different position titles under different task order categories (e.g., Senior Policy Analyst for Task 1 vs. Analyst for Task 7), or must positions be standardized across all categories?	Vendors may propose different positions titles under different task order categories.
34	5.2.17 Environmental Review (p. 24)	For Task 17, should unit pricing for environmental reviews include the cost of specialized studies (e.g., wetlands delineations, Phase I ESA), or will those be procured separately by DCR or reimbursed as pass-through costs?	Unit pricing will be considered inclusive of any specialized study necessary to complete the review. See response to Question #27.
35	4.2 Pricing (p. 15)	Does the State allow annual rate escalation within the three-year base term, or are hourly rates fixed for all three years?	The table in Attachment A asks for hourly rates each year for three years – the rates do not have to be the same each year but must be identified in the response to this RFP.
36	4.5 HUB Participation (p. 15); Attachment E (p. 55)	Will HUB participation be evaluated during the pre-qualification stage, or only at the task order level?	See response to Question #3.
37	4.9 Insurance Requirements (p. 16–17)	Must vendors demonstrate proof of all required insurance at the time of proposal submission, or is it sufficient to show the ability to obtain coverage prior to task order award?	Proof of insurance coverage is not required at the time of submission, though vendors should indicate their willingness and ability to obtain the required amount of coverage. Proof of insurance will be required prior to any task order award.
38	5.2.14 Communication & Outreach (p. 23)	For communication and outreach deliverables, will DCR provide centralized branding and style guidelines, or should vendors propose their own branding/messaging approach?	Yes, DCR will provide branding and style guidelines. Vendors may draft messaging, subject to DCR final approval.
39	1.0 Scope of Services – Staff Augmentation Page 6	Can the Department clarify whether augmented staff will be embedded onsite at DOC offices or deployed remotely, and if	See response to Question #4, #25.

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		there is a required percentage of onsite vs. remote presence?	
40	1.0 Scope of Services – Staff Augmentation Page 7	Are staff expected to support multiple grant programs simultaneously (e.g., CDBG-DR and other federal disaster recovery grants), or will assignments be dedicated to one program at a time?	As an Agency-Specific Term Contract, this contract could be used for any need within the Department of Commerce. Currently, the intent is to use the contract for CDBG-DR funded Helene Recovery programs. Specific Task Orders will identify the program(s) and assignments needed at that time.
41	1.0 Scope of Services – Disaster Recovery Expertise Page 8	Does “expert support” refer to programmatic advisory roles (e.g., policy, compliance, technical assistance) or operational roles (e.g., processing applications, reviewing files)?	Could apply to either depending upon the respective Task order.
42	3.2 Minimum Qualifications Page 13	Will the Department accept equivalent professional experience in place of formal certifications, particularly in community revitalization, federal grant administration, or disaster recovery?	It depends upon the task order.
43	3.3 Key Personnel Page 14	Are bidders required to name specific personnel in the proposal, or can they submit general position descriptions with resumes provided upon request or at award?	See response to Question #14 and #18.
44	4.0 Deliverables and Reporting Page 18	What are the specific reporting expectations for augmented staff (e.g., weekly timesheets, task completion reports, outcome-based metrics)?	Reporting expectations will be task-dependent and will reflect completion activities and timesheets as needed.
45	4.0 Performance Standards Page 19	How will the Department measure successful augmentation — is it based on hours delivered, tasks completed, or program outcomes?	DCR will measure successful staff augmentation through tasks completed and program outcomes, but will require documentation for billing based on the task order.
46	5.1 Contract Term Page 22	Is there an anticipated maximum number of augmented staff to be engaged at one time, or will this be on a task-order/on-demand basis?	No, it will be task order dependent.

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47	5.2 Compensation Page 23	Will the Department reimburse based on fixed hourly rates per role, or can firms propose blended rates?	See clarification at the top of this addendum. Payment will be a NOT-TO-EXCEED amount for services based on the scope of work for each task order.
48	6.0 Proposal Submission Requirements Page 25	Does the Department require hard-copy submission in addition to electronic, or is electronic submission via email sufficient?	See responses to Question #11 and #72.
49	6.0 Proposal Format Page 27	Is there a required template for resumes and qualifications, or will standard organizational formats be acceptable?	There is no required template; standard formats are acceptable.
50	4.0 Deliverables and Reporting Page 20	Would the Department be open to integrating lightweight third-party engagement tools (such as AskHumans) to gather stakeholder feedback and track satisfaction with augmented staff over time?	Any third-party engagement tools will have to be approved by the NC Department of Information Technology.
51	2.7 Proposal Contents Page 10	Can vendors submit more than three project examples in Attachment H to demonstrate broader HUD-related experience, or will additional examples beyond three be disregarded?	See response to Question #184.
52	4.11 Financial Information Page 17	For privately held firms, will reviewed financial statements prepared by a CPA be acceptable if audited financials are not available?	Please see Section 4.11 re privately owned entities or sole proprietorships, which includes the following language: "Last three years of audited or un-audited accrual-basis financial statements, including an income statement, cash flow statement and balance sheet"
53	4.9 Requirements Page 16	For contracts valued at less than \$1,000,000, will vendors still be required to provide proof of insurance at the higher thresholds outlined in Attachment C, or will minimum statutory coverage suffice?	Vendors should anticipate being required, at the time of the Task Order, to provide proof of insurance in the amounts for Contracts Valued in Excess of \$1,000,000.
54	5.2.1 Development of Policies, Procedures, and SOPs Page 19	Will DCR provide existing policies and templates to be updated, or should vendors plan to create all materials from scratch?	This will vary by task order.

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55	5.2.2 Financial Compliance, Oversight, and Fraud Prevention Page 19	Can DCR clarify whether financial monitoring will include direct oversight of subrecipients' accounting systems, or be limited to compliance reviews?	DCR does not anticipate financial monitoring to include direct oversight of subrecipients' accounting systems.
56	5.2.3 Duplication of Benefits Compliance Page 20	Will DCR provide access to federal and state data systems for DOB checks, or must vendors procure and integrate their own data sources?	DCR will provide access to the data systems.
57	5.2.4 Procurement Compliance and Monitoring Page 20	Should vendors anticipate providing procurement training to subrecipients, or will DCR handle training and vendors focus solely on compliance monitoring?	This will depend upon the task order and needs of subrecipients.
58	5.2.5 Claims, Appeals, and Case Reviews Page 20	Can DCR confirm whether vendors will have direct authority to make eligibility determinations, or will recommendations be reviewed and approved by DCR staff?	DCR staff will review and approve.
59	5.2.7 Needs Assessments, Market Analysis, and Geospatial Support Page 21	Will DCR provide access to state GIS and data repositories, or must vendors rely on publicly available datasets?	DCR can provide access to state data, but the vendor may also choose to use publicly available datasets.
60	5.2.8 Program Performance Monitoring and Evaluation Page 21	Can DCR clarify whether vendors are expected to design new performance metric systems or only provide staff to operate and maintain DCR-selected systems?	Vendors will be expected to help develop and design performance metric systems and conduct program evaluation activities.
61	5.2.8 Program Performance Monitoring and Evaluation Page 21	Will vendors be granted access to the Disaster Recovery Grant Reporting (DRGR) system directly, or will all DRGR reporting be managed through DCR staff?	DRGR reporting will be managed by DCR staff.
62	5.2.8 Program Performance Monitoring and Evaluation Page 21	Should proposed tools for milestone tracking and progress reporting be integrated with the future System of Record (SOR), or will standalone tools be acceptable?	Standalone tools will be acceptable as long as they can at least interface with the SOR to avoid manual data entry.
63	5.2.11 Technical and Engineering Support Page 22	Can DCR clarify whether engineering services must be performed by licensed Professional Engineers (PEs) in	Licensing in the state of North Carolina will not be required for most tasks, however PEs must be knowledgeable of local codes

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		North Carolina, or if equivalent licensed professionals from other states are acceptable?	and requirements sufficient to provide a thorough review and feasibility analysis of projects.
64	5.2.12 Training, Technical Assistance, and Capacity Building Page 22	Should training materials be designed for statewide use and reuse, or should they be tailored to specific subrecipients/programs?	Statewide use.
65	5.2.14 Communication, Public Information, and Outreach Support Page 23	Will DCR provide branding/graphic standards for public-facing materials, or should vendors propose their own?	See response to Question #38.
66	5.2.16 Technical Systems Specification & Project Management Page 23	Can DCR clarify whether the vendor's role is limited to documenting workflows and specifications, or will vendors also be expected to manage vendors providing SOR development services?	Documenting workflows and specifications. DCR will manage vendors providing SOR development services.
67	5.2.16 Technical Systems Specification & Project Management Page 23	Is there an anticipated timeline for finalizing the System of Record (SOR), and will Task 16 vendors be engaged prior to or after system vendor selection?	See response to Question #104.
68	5.2.16 Technical Systems Specification & Project Management Page 23	Will vendors under Task 16 be expected to provide ongoing project management support for system implementation (e.g., sprint planning, testing, user acceptance) or only provide initial specifications?	Anticipated deliverables are workflow and technical specification documentation and project management and monitoring of SOR.
69	5.2.16 Technical Systems Specification & Project Management Page 23	Can DCR clarify if integration requirements with financial management and reporting systems are within scope for Task 16 vendors?	Yes, these could be within scope depending upon the task orders.
70	5.2.17 Environmental Review Page 24	Should vendors provide unit costs inclusive of all required studies (e.g., noise, floodplain, endangered species), or will these be contracted separately as needed?	See response to Question #34.
71	3.4 Evaluation Criteria Page 13	Will DCR assign weighted scoring to the evaluation factors (experience, firm qualifications, methodology, cost), and if so, can	Criteria are listed in order of importance; no specific weights will be assigned.

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		the weights be shared with vendors?	
72	2.6 RFP Submittal Page 8	If a vendor experiences technical issues with the eProcurement portal on the submission deadline, is there an alternate method (e.g., email submission) permitted as backup?	Pursuant to 01 NCAC 05B .0303, e-mail, facsimile, and telephone offers shall not be accepted in response to a Solicitation that is required to be sealed pursuant to Rule .0301. Vendors should not wait until the submission deadline to begin submitting through the portal. Submit well in advance with plenty of time to call the helpdesk for assistance. For training on how to use eProcurement Sourcing, https://eprocurement.nc.gov/training/vendor-training . Questions or issues related to using eProcurement Sourcing must be directed to the eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET
73	2.7 Proposal Contents, Page 9	Can the vendor include cover letter with the submittal?	Yes
74	18 Subcontracting, Page 46	Is it permissible for a firm to be included as a subcontractor on another firm’s response in addition to submitting its own proposal as a prime respondent?	Yes. DCR will ensure there are no conflicts of interest when issuing task orders and making selections.
75	18 Subcontracting, Page 46	Are subcontractors required to complete the attachment forms as well, or is that only required of the prime respondent?	The prime respondent is the responsible entity, so it is only required of the prime respondent for now. Information from subcontractors, such as the lobbying certification, may be required upon contract.
76	3.5 Performance Outside the United States, Page 14	Should the completed form required, Attachment D, be included in the upload of the entire RFP document via the Ariba procurement portal or	See response to Question #21. The entire offer, one (1) pdf file, should be uploaded in eProcurement Sourcing in Section 5.1 VENDOR OFFER.

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		separately as an appendix in the submittal?	
77	4.5 Hub Participation, Pages 15-16	Should the completed form required, Attachment E, be included in the upload of the entire RFP document via the Ariba procurement portal or separately as an appendix in the submittal?	See response to Question #21 and #76.
78	4.10 Lobbying Activity Certification for Federal Grants, Page 17	Should the completed forms required, Attachments F & G, be included in the upload of the entire RFP document via the Ariba procurement portal or separately as an appendix in the submittal?	See response to Question #21, #76, and #77.
79	No reference citation provided by the Vendor.	What would be the number of awards you intend to give (approximate number)?	See response to Question #28.
80	No reference citation provided by the Vendor.	What are the estimated funds that are estimated to be allocated for this contract?	Funds allocated to these activities depend upon task orders issued.
81	No reference citation provided by the Vendor.	What is the tentative start date of this engagement?	That will vary by task order, but first tasks could start as early as October 2025 after evaluation committee reviews.
82	No reference citation provided by the Vendor.	What is the work location of the proposed candidates?	See response to Question #4 and #25.
83	No reference citation provided by the Vendor.	Is this a new contract or are there any incumbents? If there is an incumbent, could you please let us know the incumbent name and pricing and are the incumbents eligible to submit the proposal again?	The Division of Community Revitalization (DCR) is a new division and new program. This is a new contract for DCR.
84	No reference citation provided by the Vendor.	Are there any pain points or issues with the current vendor(s)?	See response to Question #83.
85	No reference citation provided by the Vendor.	Could you please share the previous spending on this contract, if any?	See response to Question #83.
86	No reference citation provided by the Vendor.	Is there any mandatory subcontracting requirement for this contract? If yes, Is there any specific goal for the subcontracting?	There is no mandatory subcontracting requirement. Please see NC General T&Cs #18 on page 46 regarding subcontracting.

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87	No reference citation provided by the Vendor.	How many positions were used in the previous contract (approximate)?	See response to Question #83.
88	No reference citation provided by the Vendor.	How many positions will be required per year or throughout the contract term?	This information is not known. Per RFP Section 5.1 GENERAL, <i>"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."</i>
89	No reference citation provided by the Vendor.	If the resources we provide at the time of proposal submission are not available at the time of a potential contract award could vendors replace them with equally qualified resources?	Yes, subject to approval of proposed replacement personnel by the Division of Community Revitalization.
90	No reference citation provided by the Vendor.	Can we provide hourly rate ranges in the price proposal?	No, rate ranges per position are not acceptable.
91	No reference citation provided by the Vendor.	Is it entirely onsite work or can it be done remotely to some extent / Does the services need to be delivered onsite or is there a possibility for remote operations and performance?	See response to Question #4 and #25. The specific Task Order will contain requirements, terms, and conditions particular to that project.
92	No reference citation provided by the Vendor.	Are resumes required at the time of proposal submission? If yes, Do we need to submit the actual resumes for proposed candidates or can we submit the sample resumes?	See response to Question #14, #18, #43, and #49.
93	No reference citation provided by the Vendor.	Could you please provide the list of holidays?	2025 State Holidays: September 1 (Labor Day) November 11 (Veterans Day) November 27-28 (Thanksgiving) December 24-26 (Christmas) 2026 State Holidays: January 1 (New Year's Day) January 19 (Martin Luther King Jr. Birthday) April 3 (Good Friday) May 25 (Memorial Day) July 3 (Independence Day) September 7 (Labor Day) November 11 (Veterans Day) November 26-27 (Thanksgiving) December 24, 25, 28 (Christmas)

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94	No reference citation provided by the Vendor.	Are there any mandated Paid Time Off, Vacation, etc.?	This is up to each vendor.
95	5.0 Scope of Work Page 18	If a vendor is selected for inclusion on the STC, will they be required to submit proposals for all subsequent Task Orders within their designated task areas, or will vendors have the discretion to determine which Task Orders they wish to pursue?	Vendors will not be required to respond to subsequent Task Orders.
96	General Clarification (Applicable Across Categories) Section 5.0, Scope of Work Page 18 Section 4.0, Requirements Page 14	For software-driven deliverables, are there preferred platforms or technical standards (e.g., security, integration) DCR requires for training, reporting, or grant management tools?	DCR does not have any preferred platforms. DCR is in the procurement process for a grant management system that could have potential requirements, but they are not yet known. Technical standards will depend on the deliverable and must conform to NCDIT's relevant standards.
97	General Clarification Section 5.2.12, Task 12: Training, Technical Assistance, and Capacity Building Page 22	What is the anticipated volume or scale of training sessions (in-person/virtual) per year? Is there a preferred mode (on-site vs remote) for delivery?	There could be multiple training sessions per year, depending on training needs. The mode of delivery will vary depending on the type of training.
98	General Clarification Section 5.2.12, Task 12: Training, Technical Assistance, and Capacity Building Page 22	Will DCR provide existing training materials or resources for the vendor to build upon, or is the successful proposer expected to develop content from scratch?	Training materials will be developed in collaboration with DCR. The exact training needs are not yet known.
99	Task 12: Training, Technical Assistance, and Capacity Building Section 5.2.12 Page 22	Can you clarify what regulatory areas (e.g., CDBG-DR specifics, HUD rules, state procurement) you anticipate requiring ongoing training for?	The exact training needs are not yet known, but training will likely be needed to ensure compliance with CDBG-DR, HUD, federal, state, and local requirements.
100	Task 12: Training, Technical Assistance, and Capacity Building Section 5.2.12 Page 22	Is there a required certification for trainers or specific credentials preferred in training staff?	No specific certifications are required, but trainers should have expertise in the training that is being provided.
101	Task 12: Training, Technical Assistance, and Capacity Building Section 5.2.12 Page 22	Will the successful proposer be supporting only DCR staff, or will task orders extend to subrecipients and external partners? What is the expected	Per the RFP in task 12, training sessions are for DCR staff, subrecipients, and partners. The expected size of these events is not yet known.

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		attendee profile/size for technical assistance events?	
102	Task 12: Training, Technical Assistance, and Capacity Building Section 5.2.12 Page 22	What systems or formats do DCR prefer for application intake support? For example, web portals, paper-based, or hybrid?	This is not yet determined due to a system not yet being procured. An interim process is being developed.
103	Task 12: Training, Technical Assistance, and Capacity Building Section 5.2.12 Page 22	Does DCR intend to incorporate any Learning Management System (LMS) or digital training platform as part of this work, or should the vendor propose one?	Currently, DCR does not plan to incorporate a digital training platform.
104	Task 15: Grant Management Section 5.2.15 Page 24	Can you specify which grant management systems (if any) are currently used by DCR, or should vendors recommend/provide their own?	The Division of Community Revitalization (DCR) issued a competitive procurement for a grant management system; offers are under evaluation.
105	Task 15: Grant Management Section 5.2.15 Page 24	Is grant management support expected to include direct interaction with subrecipients regarding compliance or just tools/workflows?	Grants management support could include direct interaction with subrecipients depending on the task.
106	Task 15: Grant Management Section 5.2.15 Page 24	Does DCR seek tools that integrate with HUD reporting systems (e.g., DRGR) or should vendor workflows remain standalone?	Integration with DRGR is not allowed. Data can be uploaded to the system using templates provided by HUD.
107	Task 14: Communication, Public Information, and Outreach Support Section 5.2.14 Page 23	Are there existing branding, accessibility, or language translation standards vendors must adhere to for outreach materials?	See response to Question #38.
108	Task 14: Communication, Public Information, and Outreach Support Section 5.2.14 Page 23	What digital platforms are currently leveraged for public communication (e.g., website, email, social media), and is the vendor intended to manage any of these directly?	DCR uses email, listservs, website, social media, and may implement additional platforms as needed. The vendor is not intended to manage any of these directly.
109	Task 14: Communication, Public Information, and Outreach Support Section 5.2.14 Page 23	For crisis communication protocols, will the vendor act as spokesperson or advisory support only?	Advisory support only.
110	Task 14: Communication, Public Information, and Outreach Support	Are rural/low-connectivity communities a focus for outreach delivery and, if so, what accommodations are preferred?	Yes; accommodations depend on community need but may include in-person meetings, printed materials, or working with local

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	Section 5.2.14 Page 23		partners, stakeholders, and other groups directly in the community.
111	Task 8: Program Performance Monitoring & Evaluation Section 5.2.8 Page 21	Does DCR have an existing DRGR or program performance dashboard, or is the vendor expected to implement and operate such a system?	DCR is a new division and does not have a program performance dashboard.
112	Task 8: Program Performance Monitoring & Evaluation Section 5.2.8 Page 21	What KPIs or compliance metrics are used in current monitoring, and will samples/templates be provided to the selected vendor?	DCR has not yet developed KPIs.
113	Task 8: Program Performance Monitoring & Evaluation Section 5.2.8 Page 21	Are site visits, interviews, or fieldwork expected as part of evaluation deliverables, or will work be limited to reporting and data analysis?	Task 8 will mainly be limited to reporting and data analysis and could require interviews. Monitoring is under Task 10.
114	Additional Strategic Questions Section 5.2, Tasks / Deliverables Multiple pages (19–24)	Is there a preferred form and structure for reporting deliverables (e.g., templates, digital uploads)?	No.
115	Additional Strategic Questions Section 5.4, Transition Assistance Page 24	How will transition assistance during closeout (Section 5.4) be handled for technical/software deliverables?	Please see clarification for T&C 2(b) at the top of this Addendum.
116	5.1 Scope of Work - General Page 21	The Scope of work indicates “DCR will utilize a System of Record (SOR) for CDBG-DR grant activities” Has this system of record been finalized, if so. Please indicate.	See response to Question #104.
117	5.2.8 - TASK 8 – Program Performance Monitoring and Evaluation Page 21	The RFP notes the vendor will assist with “performance metric tracking systems.” Does DCR have a preferred project or task management software currently in use?	No.
118	5.2.14 - TASK 14 – Communication, Public Information, and Outreach Support Page 23	The RFP notes the vendor will assist with “language translation.”	Materials may be provided through both oral interpretation and written translation services to people at no cost and these services are available upon

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		Does DCR have a known list of target languages for translation?	request. Meaningful and equal access to federally funded programs and activities is required by Title VI of the Civil Rights Act of 1964.
119	3.4 Evaluation Criteria Page 13	Under Evaluation Criteria 1. Experience, the State lists "Years of experience in the business". Is this the total years of the firm has been in business or total years of experience managing federal/HUD funds?	Please include both in your proposal; HUD and disaster recovery experience is the most relevant.
120	2.7 Proposal Contents Page 9	The RFP requires the disclosure of the respondent's finance information, but the Proposal Contents Section does not list an area to provide that disclosure. Is it OK that the respondent's financial information is provided after 6. Examples?	Yes.
121	2.7 Proposal Contents Page 9 and 10	May respondents provide a cover letter?	See response to Question #73.
122	Attachment E: Historically Underutilized Businesses Information Page 55	If we are utilizing a subcontractor that is a Historically Underutilized Business, may we indicate "Yes" to the questions on the form? What other information in the response will the state require to identify subcontractors?	Attachment E: Historically Underutilized Business Information regards the Vendor submitting the offer (prime contractor). The Vendor may indicate in their offer names of subcontractors and the subcontractor(s) HUB status.
123	2.7 Proposal Contents Pages 9 and 10	Section 2.7 states that "All pages of the RFP should be returned," but Item #2 asks only for "Signed Execution Pages and signed Addenda." Where should bidders attach all pages of the RFP? In the section corresponding to Item #2, or as an attachment to the proposal?	The entire offer, one (1) pdf file, should be uploaded in eProcurement Sourcing in Section 5.1 VENDOR OFFER. The entire offer includes information in RFP Section 2.7 PROPOSAL CONTENTS, and all information required by the RFP. The State will not disqualify a Vendor for where in the offer the Vendor elects to place all pages of the RFP.
124	4.9 Insurance Requirements Page 16	This section states that "Vendor shall submit acceptable evidence of insurance with each task order." Please confirm that proof of insurance should be submitted	See response to Question #37.

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		only with task orders, not with this response.	
125	Ariba Sourcing Event, Section 5.1	Please confirm that the upload required in this section should include a complete, signed, and initialed copy of the Solicitation Document, and our unredacted offer, in a single PDF file. (If not, please clarify the intended content to upload.)	<p>eProcurement Sourcing, Section 5.1 VENDOR OFFER, is where to upload the complete and <u>signed UNREDACTED</u> offer. The <u>entire offer</u> should be one (1) pdf file.</p> <p>eProcurement Sourcing, Section 5.3 VENDOR OFFER (REDACTED), is where to upload the REDACTED offer.</p>
126	Ariba Sourcing Event, Section 5.2	This section requests that bidders upload a completed Attachment A, Pricing, in Excel format. However, Attachment A is provided only in PDF format, not in Excel. Is there an Excel version of Attachment A that DCR will provide? Or are bidders expected to replicate the entire content of Attachment A in Excel before completing it and uploading it? Or is Excel only for the pricing table, and the rest of Attachment A should be completed in PDF format? If the latter, are bidders able to upload more than one file in Section 5.2?	<p>eProcurement Sourcing, Section 5.2 ATTACHMENT A: PRICING is where to upload <u>pricing</u> in <u>Excel</u> format. Do not password protect the Excel Price file.</p> <p>There is not an Attachment A: Pricing (in Excel) for Vendors to download. Vendors should replicate in Excel the format shown in Attachment A for pricing submittal.</p> <p>Attachment A (RFP page 26) TASK ORDER CATEGORIES the vendor should return in <u>pdf</u> format. The TASK ORDER CATEGORIES selected by the Vendor should be included in the entire Vendor offer uploaded in Section 5.1 VENDOR OFFER (unredacted).</p>
127	5.2.1 Task 1 – Development of Policies, Procedures, and SOPs Page 19	Will this staff augmentation also support the Workforce Housing for Homeownership (WHO) Program?	Yes, it could potentially support the Workforce Housing for Homeownership (WHO) Program, depending on the requirements of individual task orders.

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128	2.3 Notice to Vendors Regarding RFP Terms and Conditions Page 7	Is there a preferred format for submitting exceptions or redlines in the “Errata and Exceptions” section, i.e., does the State prefer redlines or a statement describing the changes vendor would seek to negotiate upon award?	The State prefers a statement describing the changes vendor would seek to negotiate. The State is not required to consider any proposed modifications and may choose not to negotiate T&Cs.
129	3.4 Evaluation Criteria Page 13	Please confirm the presence of exceptions or redlines to the RFP Terms and Conditions will not impact proposal scoring under the Firm Qualifications or Methodology criteria.	Exceptions or redlines to the T&Cs will not impact scoring; however, the State is not required to consider any proposed modifications and may choose not to negotiate T&Cs.
130	Attachment C, Section 2(b), Default and Termination Page 38	Can the State please define the term “CONTRACTOR” as used in this section? Will the State consider adding this term to its definitions under RFP Section 2.8?	A contractor is a business or entity that agrees to perform work under terms of a contract. DCR will add this term to its definitions under RFP Section 2.8.
131	Attachment C, Section 2(b), Default and Termination Page 38	Please confirm that section 2(b) within Attachment C does not apply to the staff augmentation vendor.	See replacement language at the beginning of this Addendum.
132	Attachment C, Section 2(b), Default and Termination Page 38	Please confirm that delays beyond vendor’s control (e.g., force majeure, state or grantee actions, and delays by the State other third parties, etc.) will not trigger liquidated damages.	See clarification at the top of this Addendum regarding 2(b).
133	Attachment B, Section VI, Bid Submission, 23. Valid Taxpayer Information Page 35	Can the State please provide a working link to the Substitute W-9 and Instructions?	https://www.osbm.nc.gov/direct-ed-grants-w-9-form/open . For General Instructions, please refer to the IRS Form W-9 located on the IRS Website (https://www.irs.gov/)
134	Section 4.3, Payment Structure Page 15	The RFP states “Payment will be a fixed fee for services based on the scope of work for each task order,” however the state is only requesting not to exceed labor rates (other than for the environmental unit tasks). Please confirm offerors will be able to invoice the state based on the	See clarification at the top of this addendum: Payment will be a NOT-TO-EXCEED amount for services based on the scope of work for each task order.

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		not-to-exceed labor rates for the time and materials portion.	
135	Section 2.1, Request for Proposal and Task Orders Page 7	Can the state provide a sample task order for review?	We do not have a sample task order for review at this time.
136	Section 5.2.17, Task 17 – Environmental Review Page 24	Is there currently a statewide Section 106 Programmatic Agreement which the state utilizes to expedite Section 106 compliance?	No. A statewide PA does not yet exist.
137	Section 5.2.17, Task 17 – Environmental Review Page 24	Given the wide range of complexities and variables of a potential Environmental Impact Statement (EIS), would it be acceptable to omit a cost estimate for EISs? And instead, provide an estimate when more details are known?	A cost estimate should be provided for all levels of review, however vendors may note assumptions utilized to determine their cost estimates.
138	2.7 Proposal Contents, 5. Resumes and Bios Page 10	Can DOC clarify what staff should be considered key personnel?	Key personnel are task-specific.
139	2.7 Proposal Contents, 5. Resumes and Bios Page 10	By encouraging vendors to submit at least two qualified candidates per position or labor category, is this also requesting resumes/bios for every potential candidate? Should there be multiple named candidates proposed for every LCAT, or for support/lower level LCATs can the vendor simply provide a summary of the qualifications that will be met by the individual slated to support in this role?	See response to Question #14, #18, #43, and #49.
140	3.4 Evaluation Criteria Page 13-14	Is DOC able to elaborate further on the criteria/scoring that goes into the narrative evaluation, specifically if any points or weight is assigned to the multiple factors taken into consideration of the best-value evaluation?	See response to Question #71.
141	Attachment C, 2. <u>DEFAULT AND TERMINATION</u> , b) Liquidated damages... Page 38-39	Can DOC clarify if this clause is relevant since the task orders and descriptions do not imply that any single-family reconstruction projects will be done under this contract?	See replacement language at the top of this Addendum.

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142	Attachment B, VI. BID SUBMISSION, 22. <u>INELIGIBLE VENDORS</u> Page 35	Given there are possible monitoring and oversight responsibilities under this contract, can DOC clarify if the vendor selected to provide services for DOC/DCR for the Single-Family Homeowner Recovery program is precluded from pursuing this contract?	Horne, in its capacity as the Single-Family Housing Recovery vendor, is precluded from participating in any monitoring-related task orders for the Single-Family Housing program, as well as any other task orders that would present a conflict of interest.
143	Attachment B, VI. BID SUBMISSION, 22. <u>INELIGIBLE VENDORS</u> Page 35	Given there are possible monitoring and oversight responsibilities under this contract, can DOC clarify if any subcontractor providing services under the prime for the Single-Family Homeowner Recovery program is precluded from pursuing this contract?	Vendors or subcontractors may not monitor or provide oversight for work they have performed themselves. However, they may be included in the pre-qualified vendor pool to support monitoring or oversight for other programs or task orders where no conflict of interest exists.
144	3.5 Performance outside the US Page 14	Does DCR specifically prefer firms that would provide the “option” to offshore some of the awarded work, or is this merely the disclosure of where each firm employee resides?	No, DCR does not specifically prefer firms that offshore work. The request is solely for disclosure of where each firm’s employees reside.
145	4.3 Payment Structure Page 15	Please clarify the “fixed fee for services based on the scope of work for each task order” statement. It is our understanding that this RFP is the vehicle for interested firms to get into a pre-approved pool of vendors for future work considerations. Please confirm that this fixed fee seems to be referencing future opportunities for firms that achieve pre approval status, to submit “fixed fee” task order bids for future work RFP’s. Our interpretation is that there will be no fixed fee submittals for this specific RFP, only a detailed hourly rate card for any Task Order Categories that our firm is interested in	That is correct. See clarification at the top of this Addendum.

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		responding, will be submitted, correct?	
146	4.8 Vendor’s Representations Page 16	Please confirm whether the selected vendor will be classified as a contractor rather than a subrecipient?	The selected vendor will be classified as a contractor.
147	5.1 General (Scope of Work) Page 18	Please confirm whether these tasks pertain to full-team capabilities rather than being specific to any one vendor?	If this question is referring to partners and subcontractors, then the tasks pertain to full-team capabilities (including partners and subcontractors).
148	5.1 General (Scope of Work) Page 18	For tasks similar to previous DCR CDBG-DR RFPs, does DCR expect to engage vendors for expanded scopes of work not previously contemplated, or only in the event of identified limitations with selected vendor for those RFPs?	DCR recognizes that either of these is possible – unanticipated work as well as limitations with another selected vendor. DCR will distribute tasks among vendors depending on its need and the vendors’ qualifications and experience.
149	5.2 Tasks/Deliverables Page 19	<p>Would selected vendor(s) for the below tasks assist work in conjunction or in the alternative potentially to vendor(s) selected to perform the Scope of Work envisioned in RFP# DPC-646236801-MT?</p> <ul style="list-style-type: none"> • Financial Compliance, Oversight, and Fraud Prevention. • Duplication of Benefits (DOB) Compliance. • Procurement Compliance and Monitoring. • Program Performance Monitoring and Evaluation. • Civil Rights, Fair Housing, Labor Standards, and Historic Preservation. • Audit Readiness and Monitoring Support. • Training, Technical Assistance, and Capacity Building. • Grant Management. 	DCR will distribute tasks among vendors on this contract and on State Term Contract 8411A depending on its need and the vendors’ qualifications and experience. DCR intends to separate tasks, but some collaboration may be required.
150	5.2.1 Task 1 – Development of Policies, Procedures, and	Is the service of assisting in the “Development of Policies, Procedures, and Standard	Anticipated for both Action Plan programs and general grants management.

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	Standard Operating Procedures (SOPs) Page 19	Operating Procedures (SOPs)" envisioned as something that would be done for each Action Plan program or for more general CDBG-DR grant management needs?	
151	5.2.13 Task 13 – Relocation Program (URA/TRA) Development and Compliance Support Page 22-23	Is the service of assisting with "Relocation Program Development and Compliance Support" envisioned as something that would be done as a separate program and contract from current contracts with vendors operating the Renew NC Reconstruction and Rehabilitation for Owner-Occupied Units Program?	The service of assisting with "Relocation Program Development and Compliance Support" is envisioned as something that would support URA compliance within housing, infrastructure, and/or economic revitalization programs, as required.
152	5.2.14 Task 14 – Communication, Public Information, and Outreach Support Page 23	Is the service of assisting with "Communication, Public Information, and Outreach Support" envisioned as something that would be done for each Action Plan program or specific ones?	The service of assisting with "Communication, Public Information, and Outreach Support" is envisioned as being available for all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.
153	5.2.16 Task16 – Technical Systems Specification & Project Management Page 23	Is the service of assisting with "Technical Systems Specification & Project Management" envisioned as something that would be done as an overarching service across all Action Plan programs or specific ones?	The service of assisting with "Technical Systems Specification & Project Management" is envisioned as an overarching service available across all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.
154	5.2.5 Task 5 – Claims, Appeals, and Case Reviews Page 20	Is the service of assisting with "Claims, Appeals, and Case Reviews" envisioned as something that would be done for each Action Plan program or specific ones?	The service of assisting with "Claims, Appeals, and Case Reviews" is envisioned as being available for all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.

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155	5.2.7 Task 7 – Needs Assessments, Market Analysis, and Geospatial Support Page 21	Is the service of assisting with “Needs Assessments, Market Analysis, and Geospatial Support” envisioned as something that would be done for each Action Plan program or specific ones?	The service of assisting with “Needs Assessments, Market Analysis, and Geospatial Support” is envisioned as being available for all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.
156	5.0 Scope of Work Page 18	Are the selected vendors of this RFP expected to support Hurricane Helene efforts and reporting to current Program Manager, Horne; or is this exclusively related to future events.	The selected vendors of this RFP are expected to support DCR. Horne is providing implementation services to one of the five DCR programs outlined in the Action Plan.
157	5.2.3 Page 20	Does DCR currently have access to benefits datasets required for the duplication of benefits calculation at beneficiary and property level?	Yes.
158	5.2.16 Page 23	What platform/products does DCR intend to use as the system of record?	See response to Question #104.
159	5.2.16 Page 23	Does DCR expect the system of record to integrate with financial or other agency/State-owned system.	Yes.
160	2.7 Proposal Contents/ 5. Resumes and Bios Page 10	For the “two qualified candidates per position or labor category”, is this by overall service or by billing rate?	See response to Question #14, #18, #43, and #49.
161	5.2.17 TASK 17 – Environmental Review Page 24	Do you anticipate any SEPA documentation under Task 17?	Yes. NEPA compliance will require the state to follow any applicable SEPA requirements.
162	5.2.17 TASK 17 – Environmental Review / Anticipated Deliverables Page 24 –and– Attachment A – Pricing Page 28	For Task 17 we are being asked to provide Unit Costs for Environmental Reviews (ER) on the basis of the required <i>level</i> of the review. However, different project reviews at the <i>same level</i> may have significantly different costs associated with them based on site-specific conditions requiring additional assessment/studies (e.g. Phase I	Vendors are welcome to provide any project assumptions along with their cost estimates however project costs must be sufficient to include any information necessary for a compliant NEPA review.

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		and/or Phase II ESAs, wetlands delineation, etc.) to produce a compliant ER. Costs for these additional assessments may exceed the typical unit cost by a factor of 10 or more. How do we account for these potential differences in costs for the purpose of submitting unit costs?	
163	5.2 TASKS / DELIVERABLES Task 9 (section 5.2.9) Page 21	<p>The section requests technical assistance "including but not limited to civil rights, fair housing, labor standards, and historic preservation."</p> <p>It appears as if the intention of the RFP is for firms to propose on a full task; however, there are firms that specialize in historic preservation and Section 106 consultation without any expertise in items like fair housing and labor standards.</p> <p>Would it be permissible for a firm to propose on a subset of services within a Task? Specifically for Task 9, can a firm provide qualifications for work involving Section 106 consultation and other historic resources services but not the other scope items within Task 9?</p>	The vendor or its team should be able to respond to all tasks and deliverables within task 9. DCR may or may not issue task orders for all of these activities.
164	4.11 FINANCIAL INFORMATION Page 17	Can submit financial statements directly instead of including in the response, o avoid any unintentional disclosure given the highly confidential nature of the information?	No, all documents that are part of the proposal should be submitted in one pdf file in the sourcing tool, as described in the RFP. A redacted version should be submitted separately.
165	5.1 General Page 18	Does the State have an estimate of how many staff will be activated for this contract?	See response to Question #88. This information is not known. Per RFP Section 5.1 GENERAL, <i>"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."</i>

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166	5.1 General Page 18	How many staff has the State hired on previous staff augmentation contracts for CDBG-DR program?	See response to Question #83. The Division of Community Revitalization (DCR) is a new division and new program. This is a new contract for DCR. The number of staff hired via staff augmentation contracts by agencies other than the Department of Commerce, Division of Community Revitalization, the information would need to be obtained from that respective agency.
167	3.1 Method of Award Page 11-12	Does the State have an estimate of how many vendors will be awarded per Task?	See response to Question #28.
168	2.7 Proposal Contents, Item 5. Resumes and Bios Page 10	Does the State intend for vendors to provide 2 resumes per position listed in the cost form, 2 resumes per Task, or other?	Two resumes for each position listed in the cost form.
169	2.1 Request for Proposals and Task Orders Page 7	How will task orders be issued among the pre-qualified pool of vendors? Competition, Low Price, DCR's discretion, other?	See responses to Question #28 and #31.
170	5.1 General Page 18	Should the hourly rate provided for a task consider the position as remote or on location position?	See response to Question #32.
171	5.2.3 - Task 3- Duplication of benefits (DOB) Compliance Page 20	Will the staff augmentation vendor complete all DOB verifications for Horne LLP, or only assist in case of the lack of capacity?	The staff augmentation vendor may assist the Single Family Housing program only in case of lack of capacity, though it will assist with DOB for other state-run CDBG-DR programs.
172	5.2.5 & 5.2.10 Page 20 & 22	With the exception of the Appeals responsibility, how do responsibilities between 5.2.5-Task 5 on page 20 differ from 5.2.10: Task 10 on page 22?	Task 5 is for appeals, and Task 10 is for monitoring of grants.
173	5.1 General Page 18	Once a selected-pool vendor is notified of being actived, how much lead time is expected between notification and implementation of responsibilities?	Once a vendor is selected for a particular task order, the time to begin implementation will be fairly short. It will depend upon the task.
174	5.2.3-Task Order 3 Duplication of Benefits (DOB) Compliance	What data sources will be available to the contractor to analyze duplication of benefits?	DCR has data-sharing agreements in place with SBA,

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	Page 20		NFIP, NC Emergency Management and FEMA
175	2.7 Proposal Contents Page 10	Will the state accept personnel experience in lieu of firm experience?	The RFP requires personnel and firm experience.
176	2.7 Proposal Contents Page 10	Will the state consider the firm's broader experience in disaster recovery?	As stated in the RFP, vendor qualifications include experience with HUD-funded programs or other disaster recovery work.
177	5.3 Task Order Methodology Page 24	In Section 5.3, the State says, "DCR will issue task orders, as the need arises, to at least two vendors qualified in that category." Does the state intend to issue a task order to all qualified vendors for a specific task or a selected few?	See response to Question #30.
178	5.0 Scope of Work Page 18	The RFP states that some tasks may require vendors to report to an office provided by the State. Which tasks are projected to have this requirement?	See response to Question #4, #25
179	5.0 Scope of Work Page 18	Can the State confirm if both biographies and resumes are required?	Per the RFP, resumes or biographies must be provided for all key personnel proposed.
180	No reference citation provided by the Vendor.	Please identify the current vendor(s) providing the services outlined in this RFP, and provide the corresponding contract number(s) and period of performance for each.	See response to Question #9.
181	No reference citation provided by the Vendor.	Will the State consider out-of-state vendors for prime contractor roles if all work is performed during North Carolina business hours and personnel can travel on-site as needed?	Yes.
182	2.7 Proposal Contents Page 9	Please confirm whether the State prefers the proposal to be submitted as a single consolidated PDF within the eVP system, or as separate files for the technical proposal, pricing, and attachments.	See response to Question #21, #22, #76, #123, #125, and #126. Yes, the State prefers the proposal to be submitted as a single consolidated PDF in eProcurement Sourcing in Section 5.1 VENDOR OFFER.

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			Pricing should be submitted in Excel format in eProcurement Sourcing Section 5.2 ATTACHMENT A: PRICING.
183	2.7 Proposal Contents Page 9	Kindly confirm whether specific formatting requirements ,e.g., font size, font type, margin settings, apply to the technical narrative, resumes, or attachments.	There are no formatting requirements.
184	2.7 Proposal Contents Page 9	Please clarify whether any page limitations apply to the technical narrative, and whether required attachments (e.g., resumes, forms, references) are excluded from any applicable page count.	There is not a page limitation; however, Vendors are requested to keep offers concise and not to include marketing material.
185	2.7 Proposal Contents Page 9	The RFP states that "All pages of the RFP should be returned." Please clarify whether the agency requires vendors to return the entire RFP document (including all pages) as part of the proposal submission, or only the completed forms and required attachments.	All pages of the RFP should be returned as part of the proposal submission. The entire document would become part of the contract between the vendor and DCR if the vendor is awarded, so it should be signed and submitted in full.
186	2.7 Proposal Contents 5. Resumes and Bio Page 10	At the prequalification stage, will the State accept sample resumes for labor categories, or must all the proposed personnel be confirmed and committed for potential task orders?	See response to Question #14, #18, #43, and #49.
187	2.7 Proposal Contents 5. Resumes and Bio Page 10	Could the agency please clarify which specific labor categories will be required under this contract and the expected experience and skill sets associated with each?	These labor categories are task-specific and will vary by task.
188	2.7 Proposal Contents 6. Examples Page 10	Please confirm whether past performance from proposed subcontractors may be included in Attachment H	See response to Question #19
189	2.7 Proposal Contents 6. Examples Page 10	Are state ,local government or federal disaster recovery programs (non-HUD funded) considered acceptable relevant experience if they demonstrate	As stated in the RFP, vendor qualifications include experience with HUD-funded programs or other disaster recovery work. Lack of such experience could be

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		comparable scope and complexity?	evaluated as a weakness in the proposal.
190	5.0 SCOPE OF WORK 5.1 GENERAL Page 18	Please clarify the expected ratio of on-site versus remote work for personnel under this contract.	The determination of on-site versus remote work will be based on program needs. DCR does not have an estimate at this time.
191	5.1 General Page 18	Can vendors add or remove task order categories after initial qualification, or must their selections remain fixed for the three-year contract term?	Vendors can remove task order categories, but the agency may not allow addition of task order categories.
192	4.7 Personnel Page 16	What is the process and expected timeline for DCR approval of key personnel substitutions, and how will delays in approval affect active task orders?	The expected process is that the vendor will notify the State in writing of any changes, and the State will attempt to respond in writing with a decision within 5 business days.
193	4.11 Financial Information Pages 17–18	For privately held firms, will unaudited financial statements be acceptable if audited statements are unavailable, and what level of detail must be disclosed for contingent liabilities?	See answer to Question #52. Vendor should provide sufficient detail for DCR to “determine: whether the Vendor has sufficient ability to perform the Contract; whether the Vendor is able to meet its short term obligations, debts, liabilities, payroll, and expenses; whether Vendor has provided complete, reliable and accurate financial information regarding its business operation; whether the Vendor is financially solvent; and whether Vendor has sufficient cash flow and/or available financing from a financial institution to perform the proposed contract for an extended period without receiving payment from the State.” (per Section 4.11)
194	2.6 RFP Submittal Page 9	Since redacted copies of proposals are required, what criteria will DCR use to determine whether a vendor’s confidentiality designations are	The State does not create “criteria” to make such determinations but follows the Public Records Act. Initially, the State may accept the Vendor’s redactions and assume they were

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		accepted or overruled under the Public Records Act?	made on a good faith basis. The State generally gives Vendors notice and an opportunity to defend their redactions if the State receives a request to provide unredacted information. Vendors are reminded that all redacted versions of the contracts must be posted on DCR’s website.
195	4.9 Insurance Requirements Page 16	Will the insurance requirements outlined in Attachment C apply to the master agreement as a whole, or only to individual task orders valued in excess of \$1,000,000?	Vendors should anticipate being required, at the time of the Task Order, to provide proof of insurance in the amounts for Contracts Valued in Excess of \$1,000,000.
196	3.4 Evaluation Criteria Pages 13–14	While the RFP lists evaluation criteria in order of importance, will DCR publish specific scoring percentages or weights associated with each factor?	See response to Question #71.
197	4.7 Personnel Page 16	Are subcontractors allowed to be proposed at the pool qualification stage, or must they be identified and approved only when responding to specific task orders?	Subcontractors should be proposed in the vendor’s response to this RFP for the qualification stage.
198	5.4 Transition Assistance Page 24	What specific activities are expected under “transition assistance”—for example, data/system turnover, staff training, or ongoing service delivery until a new vendor is operational?	See response to Question #115.
199	5.1 General Page 18	Since the SOR has not yet been finalized, what level of responsibility will vendors bear in its implementation and maintenance (for example, configuration, user support, or system administration)?	Vendors in this RFP shall not be responsible for the implementation or ongoing maintenance of the System of Record (SOR).
200	5.2.17 Environmental Review Page 24	Must vendors provide unit costs for all levels of environmental review and reevaluations, even if they intend to compete only for selected review levels?	Vendors must provide costs for all areas in which costs are required to be provided.

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201	No reference citation provided by the Vendor.	Are firms that hold disaster recovery contracts that include CDBG-DR support services for Helene impacted municipalities precluded from bidding on this contract?	No; however if a conflict of interest exists, the firm may be prohibited from working on specific task orders.
202	2.7 Page 10	<p>Section Language: 5. Resumes and Bios. This section states, "Vendors are encouraged to submit at least two qualified candidates per position or labor category, where applicable."</p> <p>Question: Please confirm the two candidates per position is only applicable to key staff and not all staff listed to support the project.</p>	See response to Question #14, #18, #43, and #49.
203	4.5 Page 16	<p>Section Language: HUB Participation. States, "...Vendors that are minority owned or have a strategic plan to support the State's Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT E: HUB SUPPLEMENTAL VENDOR INFORMATION"</p> <p>Question: This section states there is a HUB Certified goal of 10% met by a prime or subcontract certified firm; however, Attachment E appears to only inquire the state of a prime vendors HUB status. Please confirm if non-HUB-certified firms who partner with HUB-certified subcontractors will receive the same evaluation scoring. Or is the evaluation only applicable to prime firms.</p>	See response to Question #3 and #122.
204	Offeror Checklist Page 60	Section Language: Signed Offer. Submit the complete RFP, not just the signature page.	Inserting the Vendor name in the top right corner of each RFP page

		Question: Please confirm whether vendors should be placing their firm name at the top of each page of the RFP in this section.	is encouraged, but is not required.
205	2.7 Proposal Contents (page 9) and Section 4.2 Pricing (page 15)	The cost proposal is not listed under the components. Please clarify where it should be included.	See response to Question #126.
206	4.11 Financial Information (Page 17) and 2.7 Proposal Contents	This section requires submittal of financial information, but that is not listed in Section 2.7 Proposal Content. Please clarify where it should be included.	Financial information may be included anywhere in the proposal; most vendors typically include it towards the end or last.
207	2.7 Proposal Contents (page 10) and 4.1 Task Order Categories (page 14)	The instructions for Section 4 "Narrative Response: Vendor Qualifications and Approach" appear to focus on past project experience and qualifications and capacity of staff. Please confirm that you are not looking for an actual technical approach response to each task in the scope of work?	As stated in the RFP, "for each task order category that Vendor wishes to be considered Vendor proposal should demonstrate specific proof of experience and qualifications to carry out the respective task." Based on the vendor's experience, it will need to generally describe a staffing plan, how Vendor will ensure quality and timely services, and how Vendor will ramp up services across the task order categories. Vendors should describe their experience in each specific category for which they wish to be prequalified. Vendors can provide a more specific technical approach in response to individual task orders.

Execute Addendum:

VENDOR: Deloitte & Touche LLP _____

AUTHORIZED SIGNATURE: _____

NAME and TITLE (Print or Typed): _____ Linus Akanoh, Jr. DATE: 9/11/2025

A photograph of two construction workers at a demolition site. In the foreground, a man in a grey t-shirt and a dark baseball cap is wearing blue work gloves and is focused on a piece of wood. In the background, another man in a blue t-shirt and a white cap is also working. The ground is covered in a large pile of wooden debris and rubble. The scene is outdoors with trees and a clear sky in the background.

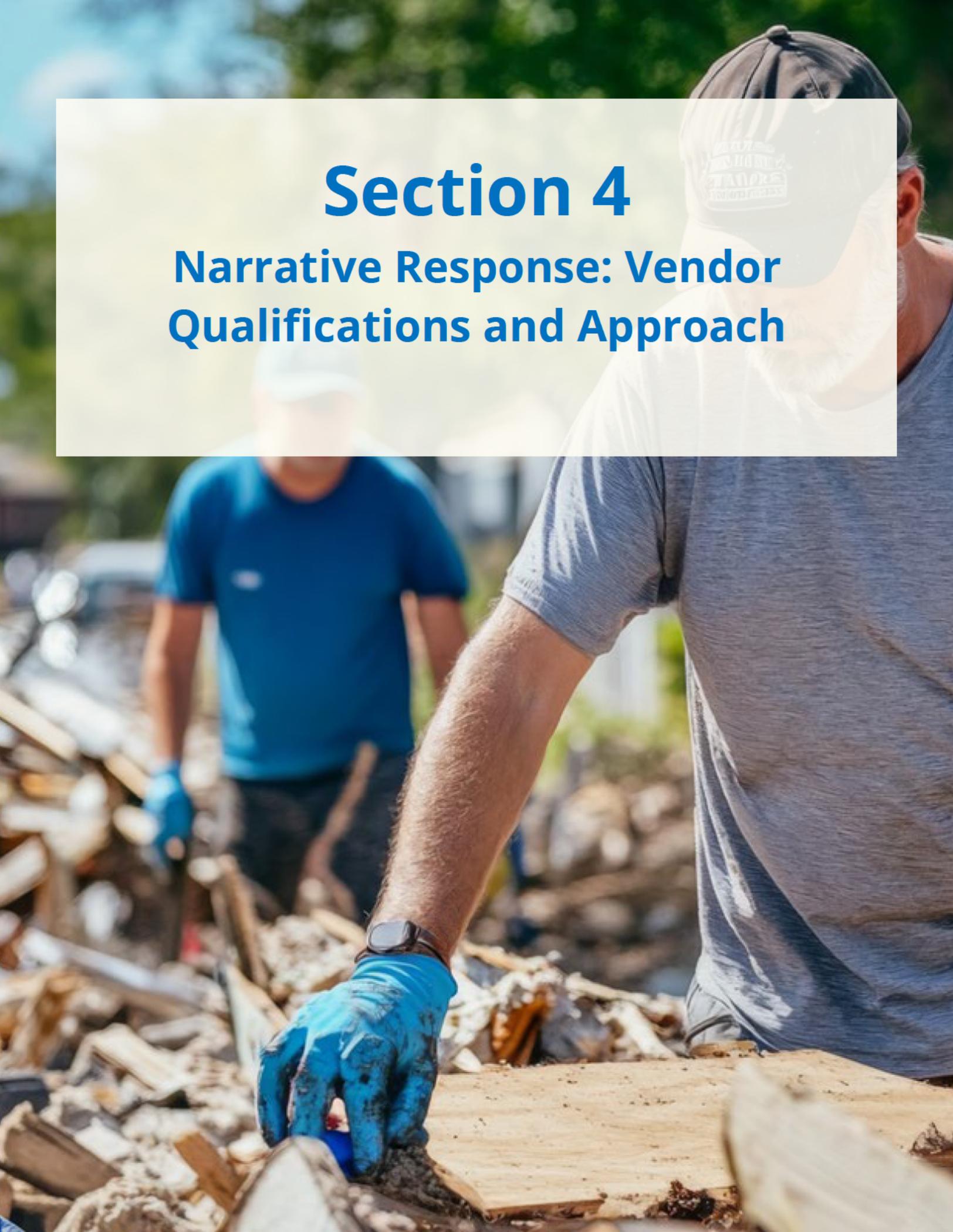
Section 3:

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3.0 Table of Contents

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Section 4

Narrative Response: Vendor Qualifications and Approach

4.0 Narrative Response: Vendor Qualifications and Approach

Executive Summary

Our team will provide the level of coordinated service that you expect and bring a depth of experience that we believe no other professional services organization can.

In the wake of Hurricane Helene, communities across western North Carolina have faced unprecedented challenges—homes destroyed, neighborhoods disrupted, and a sense of security shaken. DCR stands at the forefront of the region’s journey toward renewal, driven by a singular mission: to help disaster-impacted communities **not only rebuild, but emerge stronger, safer, and more resilient than ever before.**

Backed by \$1.4 billion in federal CDBG-DR funding, as announced by HUD, DCR is poised to provide transformative recovery solutions. Unlike immediate emergency relief, these funds are dedicated to long-term rebuilding—confirming that new homes and infrastructure are designed to withstand future storms and support thriving communities for generations to come. The federal funding the State of North Carolina has received through the CDBG-DR program is essential to supporting the long-term recovery and resilience of communities impacted by disasters. These funds have enabled the launch of diverse recovery task orders across the state, driving improvements in housing, infrastructure, and economic revitalization for North Carolinians in need.

As the agency responsible for administering these critical funds, DCR faces the complex task of confirming compliance with federal and state requirements, promoting transparency and accountability, and driving meaningful outcomes for affected residents. Effective task order execution is essential to safeguard public resources, mitigate risks, and enhance the impact of CDBG-DR investments. This critical responsibility brings with it a host of challenges, including coordinating across numerous subrecipients, interpreting and applying evolving grant management, upholding civil rights standards and fair housing standards, providing technical assistance, supporting relocation program development, managing communication, and performing a deep review of environmental documents as part of the environmental compliance process.

Meeting these objectives requires **a trusted advisor** with the ability to scale, subject matter knowledge, and proven experience—one who can provide tailored support to DCR and its subrecipients in the moments that matter. Sections 4 and 5 will further show how Deloitte and our teaming partners, AG Witt, McBride and WSP, are equipped to conform with the specifications and exceed the minimum requirements and illustrate the ability and capacity to perform the work.

Qualifications and Capacity to Support DCR through Future Task Orders

As a leading provider of disaster recovery and grants services, Deloitte delivers a broad, integrated approach to support DCR across program needs. Our team **brings deep experience and advanced technology capabilities to a full spectrum of services, including policy development, financial oversight, procurement, performance monitoring, technical assistance, environmental review, outreach and stakeholder engagement, construction management, and more.** By leveraging demonstrated methodologies and innovative tools, we help enhance the impact of CDBG-DR and other federal recovery funds in an expedited, cost-effective, and efficient manner.

Our recent experience supporting similar disaster recovery programs—both within North Carolina and nationwide—has provided us with first-hand insight into the specific challenges faced by DCR and impacted North Carolinians. Through established relationships with stakeholders across the State’s grant ecosystem, we are able to build trust, understand your operating environment, and provide value from day one.

This broad experience translates into a deep understanding of what DCR needs to effectively plan, execute, monitor, and achieve the intended outcomes of CDBG-DR investments. **We are excited by the opportunity to collaborate with the State to accelerate progress toward recovery and resilience, addressing each aspect of program delivery, from outreach and technical assistance to construction management and compliance, with expertise and care.**

Multidisciplinary Disaster Recovery Knowledge and Experience, Nationwide Perspective

Our multidisciplinary team brings together **seasoned leaders and practitioners with specialized knowledge and experience** in staff augmentation, programmatic requirements, and grants management. We have supported clients across the full spectrum of CDBG programs—including CDBG-DR—as well as American Rescue Plan Act (ARPA) and FEMA funded initiatives. Our hands-on experience in delivering targeted program technical assistance, monitoring subrecipients, and navigating evolving federal regulations has enabled numerous programs to be high-

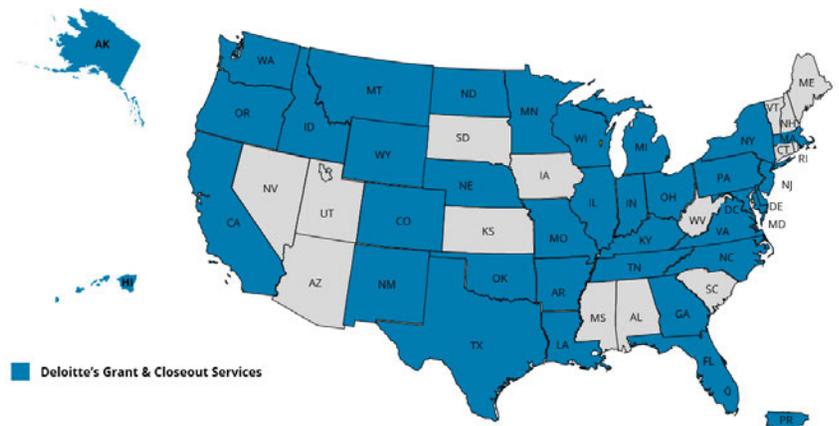


Figure 1 - Deloitte's Grant & Closeout Services

performing, resilient, and compliant. Deloitte’s first-hand knowledge of CDBG-DR and disaster recovery challenges is informed by our work with agencies nationwide—including Oklahoma, Missouri, North Carolina, New York, Florida, Louisiana, Oregon, Arkansas, Washington, Virginia, and Pennsylvania.

For example, we recently collaborated with the North Carolina Department of Commerce Pandemic Recovery Office (NCPRO) to oversee the State’s \$5.4 billion State Fiscal Recovery Fund allocation under ARPA, supporting compliance, reporting, and accounting for 68 subrecipients and beneficiaries. Our extensive experience allows us to provide end-to-end services—from compliance monitoring and risk assessment to program administration—helping agencies like DCR effectively utilize recovery funding, strengthen internal controls, and maintain compliance throughout the grant lifecycle.

With experience supporting nearly every major agency and funding program across the federal, state, and local landscape, Deloitte brings a **deep understanding of programmatic and regulatory frameworks, stakeholder engagement, and funding requirements.** Our long-standing relationships with agencies such as HUD, FEMA, and the U.S. Department of the Treasury provide valuable perspective on federal expectations and reporting requirements, confirming that DCR’s programs are aligned with leading practices and compliant with relevant regulations.

On-Demand Resources and Scalable Solutions for Evolving Priorities

We believe that Deloitte’s unmatched depth of talent supports delivery of resources at the right time, providing immediate access to specialized knowledge, experience and scalable teams that drive program success. With a nationwide bench of highly qualified professionals and experience supporting complex, federally funded initiatives, Deloitte stands ready to assist the State with agile staffing solutions, rapid mobilization, and integration of technical, functional, and regulatory specialists. Our commitment is simple: whenever and wherever support is needed, Deloitte is thereempowering the State to achieve its objectives with confidence and continuity.

Proven Tools and Accelerators for Rapid Results

We set ourselves apart by leveraging a suite of proprietary accelerators and toolkits that deliver rapid, actionable insights and measurable results. Through configurable solutions, immersive Greenhouse Labs for collaborative problem-solving, and advanced analytics, we empower your team to make data-driven decisions and anticipate challenges. Our tools have enabled clients to achieve successful outcomes in critical areas such as disaster recovery and program integrity, driving tangible impact and resilience.

Commitment to North Carolina’s Success

Deloitte’s **deep-rooted commitment to North Carolina** is demonstrated by our ongoing, trusted relationships across State agencies and our active delivery of multiple high-impact engagements under Statewide Term Contract Supplemental Audit Services 8411A. We believe that our extensive, first-hand experience working with NCPRO, Department of Commerce (DOC), Office of State Budget and Management (OSBM), Department of Environmental Quality (NCDEQ), Department of Transportation (NCDOT), Department of Health and Human Services (DHHS), Department of Public Instruction (NCDPI), and the Regional Councils of Government (COGS) gives us a deep understanding of the State’s operating environment, regulatory landscape, and community priorities.

Because **we are already embedded in North Carolina’s ecosystem**, we believe that Deloitte brings immediate value: our team is equipped with local knowledge, stakeholder relationships, and operational context that can deliver relevant, actionable insights from day one. This familiarity reduces the learning curve, accelerates time to impact, and confirms that our recommendations are grounded in the realities facing North Carolina communities.



Figure 2 : Deloitte’s North Carolina Presence

Leveraging our trusted relationships and proven experience in North Carolina, along with expertise gained from similar federal, state, and local projects, Deloitte provides DCR with valuable insights into current needs and the foresight to anticipate future challenges and opportunities. Our support provides DCR with confidence in the effectiveness and efficiency of CDBG-DR programs and the effective stewardship of federal funds. We will help DCR across the tasks laid out in the RFP that matter to North Carolina’s people and communities.

Anticipated Benefits and Outcomes for DCR

[Redacted text block containing multiple paragraphs of information, likely detailing anticipated benefits and outcomes for DCR. The content is obscured by black bars.]

4.1 A Brief History of the Organization

180 Years of Experience in Business

Deloitte traces its origins to 1845, when William Welch Deloitte founded his accounting firm in London. Over the decades, Deloitte grew through mergers and expansions, becoming one of the largest global professional services firms. With a presence in more than 150 countries, our reputation for innovation and integrity has made us a trusted advisor to organizations across industries, including major corporations, nonprofits, and governments.

Deloitte's commitment to government and public service has continually evolved to meet the complex and changing needs of federal, state, and local agencies across the United States. Through our dedicated Government & Public Services (GPS) practice, Deloitte delivers integrated solutions spanning across disaster response and recovery, grants management, advanced grant technology and management systems, and compliance, monitoring, and program integrity services. Our capabilities extend to external outreach and stakeholder engagement, infrastructure planning and development, performance improvement, and strategic partner coordination; empowering public sector clients to modernize operations, find efficiencies, and enhance citizen experiences and outcomes. Leveraging strategic partnerships and deep sector experience, Deloitte is recognized as a leading provider of consulting and technology services to government entities, supporting a wide range of missions from infrastructure resilience and public health to scientific research and national security.

Deloitte has a long-standing presence in North Carolina, supporting both private and public sector clients. Our involvement in North Carolina spans a variety of industries and services. Notable Deloitte projects and initiatives in North Carolina include:

- **OSBM Grant Writing and Technical Assistance:** Deloitte enhances capacity and experience of NC agencies, empowering them to activate transformative investment dollars under the Bipartisan Infrastructure Law (BIL), the CHIPS and Science Act, and the Inflation Reduction Act (IRA). Our detailed approach includes identifying funding opportunities and creating strategic roadmaps that align with agency priorities, convening stakeholders and hosting collaborative workshops, and providing technical expertise for grant application development. We've supported OSBM in promptly evaluating the impact of Executive Orders, Federal Directives, Agency Memoranda, and Congressional Spending Reductions to help the state be better prepared and equipped to respond to impacts on their state programs. Through this engagement, Deloitte is committed to driving impactful outcomes and supporting North Carolina's strategic goals.
- **Pandemic Support and Recovery Office (NCPRO):** A Deloitte team has been working hand in hand with more than a dozen state agencies, the higher education system, local governments and non-governmental agencies via the current NCPRO office in the monitoring and assessment, including regulatory and financial compliance, of projects funded through ARPA and implemented around the state and touching on services from mental health to historic preservation.
- **North Carolina Financial System (NCFS) Support:** We supported NC with the implementation of NCFS, the first Statewide Oracle Cloud Finance Implementation. Through this support, we have intimate knowledge of financial requirements and a complete understanding of the North Carolina financial business process. These insights and experiences enable us to make connections that other vendors may not be able to with the NCFS – which is critical for grants management support.
- **Department of Environmental Quality (DEQ):** Deloitte served as the Home Energy Rebates (HOMES) and Home Electrification and Appliance Rebates (HEAR) design consultant for NCDEQ, enhancing the agency's ability to deliver impactful energy rebate programs under the Inflation Reduction Act. Our team provided end-to-end support, including program design, stakeholder engagement, and compliance strategies,

promoting alignment with NCDEQ's climate and equity goals. Through this engagement, Deloitte helped secure over \$200 million in federal funding, efficiently advancing program implementation for environmental justice communities and supporting North Carolina's net-zero objectives.

These examples demonstrate Deloitte's multifaceted contributions to North Carolina, ranging from consulting and technology projects to community engagement and public sector innovation. Our history in North Carolina, combined with a long history of innovation and surge support in times of crisis and disaster combine to make Deloitte the trusted vendor for the wide range of needs for North Carolina's CDBG-DR operational implementation.

4.2 Relevant Experience with HUD-Funded Programs (e.g., CDBG-DR, CDBG-MIT, HOME, ESG) or Other Disaster Recovery Work

Deloitte has extensive experience supporting CDBG-DR programs nationwide. Our teams have collaborated with federal, state, and local agencies to design, launch, and administer CDBG-DR initiatives for hurricanes, floods, and other major disasters, including multi-billion-dollar recovery efforts in Texas, Puerto Rico, Louisiana, and New York. We have guided clients through each phase—from needs assessment and action plan development to program implementation, compliance monitoring, and closeout—facilitating alignment with HUD requirements and industry leading practices.

Our subject matter advisors are deeply versed in HUD regulations, including Environmental Review Procedures for Entities Assuming HUD Environmental Responsibilities (24 Code of Federal Regulations (CFR) Part 58) and Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200), and related federal guidance governing disaster recovery, mitigation, housing, and infrastructure programs. We have operationalized complex requirements such as duplication of benefits, environmental review, procurement, and reporting, and have supported clients in navigating state-specific policies, including North Carolina's State Environmental Policy Act. Our collaborative approach facilitates program activities that are compliant, audit-ready, and positioned for timely approval and funding.

Deloitte brings over 20 years of experience in disaster recovery and grants management, with a dedicated team of national recovery specialists and technical advisors who have supported HUD-funded programs and other federal initiatives across the country. Our legacy of service includes continuous innovation and improvement, enabling us to deliver scalable solutions and rapid mobilization for clients facing urgent recovery needs.

Within the past five years, Deloitte has successfully delivered services for projects of comparable scope and complexity, such as:

- Administering CDBG-DR and CDBG-MIT programs for hurricane and flood recovery in Texas and Puerto Rico, supporting billions in federal investment and thousands of beneficiaries.
- Implementing Home Investment Partnership (HOME) and Emergency Solutions Grant (ESG) programs in states like Louisiana and Florida, advancing affordable housing, economic revitalization, and hazard mitigation objectives.
- Providing technical assistance and grant management for state agencies, including OSBM, where we have helped agencies identify funding opportunities, develop strategic roadmaps, convene stakeholders, write and manage grant applications, and determine compliance for transformative federal investments under BIL, IRA and CHIPS.

- Delivering program management, technical assistance, and stakeholder engagement for Florida Division of Emergency Management’s (FDEM) Elevate initiative, supporting statewide resilience, infrastructure planning, and the effective deployment of federal disaster recovery and mitigation resources.

Deloitte’s methodologies, configurable tools, and commitment to quality position us to help North Carolina elevate the impact of federal funding and achieve its recovery and resiliency objectives—no matter the size or complexity of the program.

NATIONAL EXPERIENCE IN THE ADMINISTRATION AND OVERSIGHT OF LARGE DISASTER RECOVERY PROGRAMS

Deloitte is a recognized national leader in emergency management and disaster recovery, with a demonstrated track record of administering, overseeing, and closing out large-scale programs in response to presidentially declared disasters across the United States. Our team brings decades of hands-on experience, leveraging lessons learned from a diverse portfolio of disaster events—including hurricanes, floods, wildfires, and public health emergencies—to deliver effective solutions tailored to each client’s specific needs.

As federal grant funding landscapes evolve, Deloitte’s deep knowledge and experience positions us to help North Carolina proactively adapt its internal processes and staffing models, promoting continued program effectiveness and compliance. We offer strategic guidance and practical resources to help the State anticipate and respond to changes, drawing on leading practices refined through our work with agencies nationwide.

Deloitte’s national experience is demonstrated by our effective delivery of disaster recovery projects for events such as Hurricane Katrina, Superstorm Sandy, Hurricanes Harvey, Irma, Maria, and the COVID-19 response. In each engagement, we have consistently met critical milestones for grant administration, compliance, and reporting, supporting billions in federal investment and thousands of beneficiaries. Our approach emphasizes efficient processes, stakeholder collaboration, and clear, actionable timelines—enabling North Carolina to

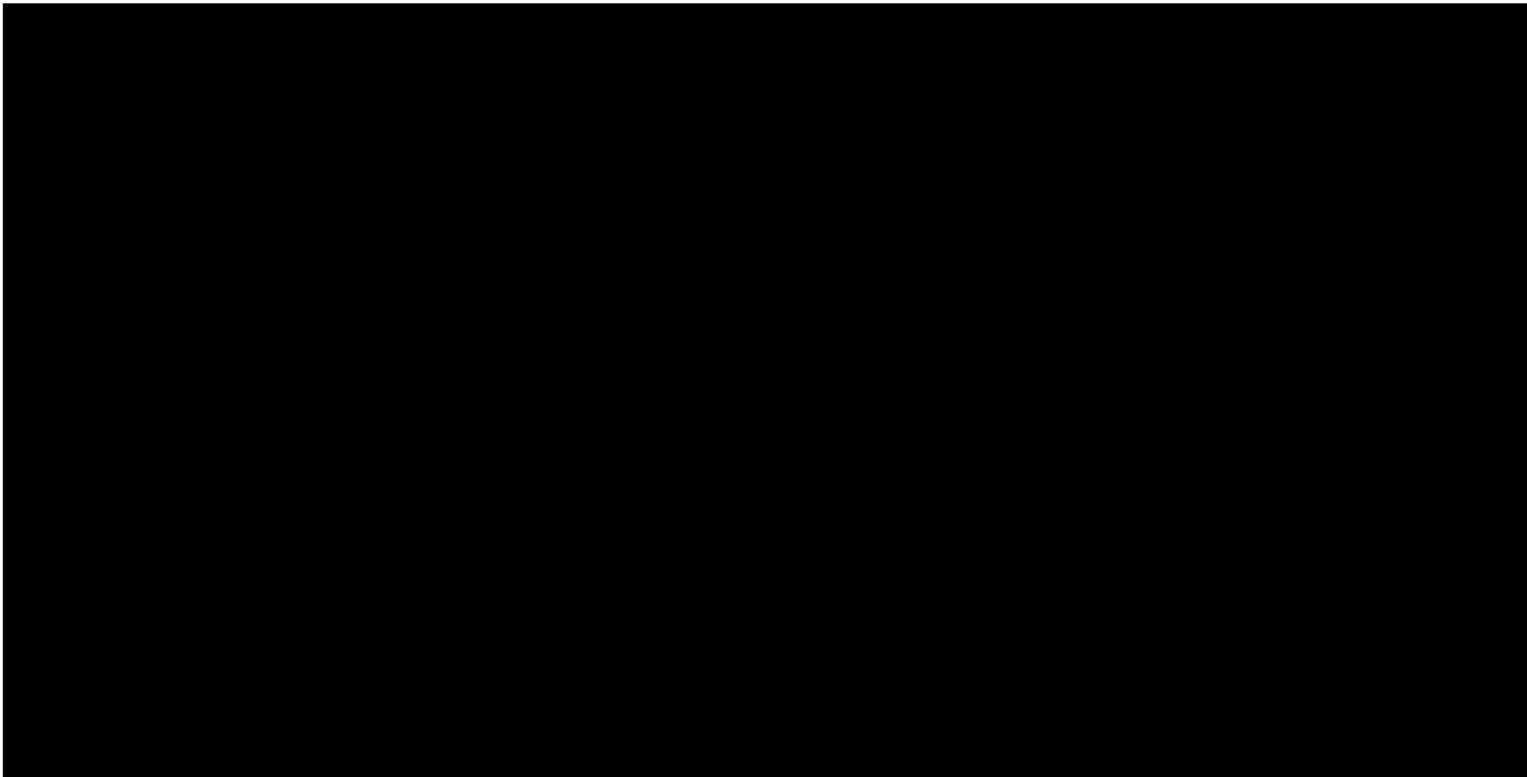


Figure 3 : National Experience Timeline

Through our ongoing work with OSBM, Deloitte has helped agencies enhance their capacity to secure and manage transformative federal investments under the BIL, CHIPS and Science Act, and IRA. Our services

include identifying funding opportunities, convening stakeholders, writing and managing grant applications, providing technical knowledge, producing competitive analyses, planning projects, performing peer-review and compliance alignment, and advising on reporting and risk mitigation. This support confirms that North Carolina is well-equipped to achieve its recovery and resiliency goals, regardless of the scale or complexity of future disaster events.

Experience with CDBG-DR Programs and Relevant Policies and Requirements

Our team brings over 100 years of combined disaster recovery experience, helping clients identify risks, strengthen controls, and implement practical improvements. Leveraging advanced analytics, collaborative technology, and real-time reporting, we provide clear insights and keep stakeholders informed. We have successfully managed a wide range of federal grant programs—including HUD CDBG-DR, FEMA HMGP, FEMA Public Assistance, ARPA, Coronavirus Aid, Relief, and Economic Security (CARES) Act, Coronavirus Relief Fund, and Emergency Rental Assistance—and **are eager to bring this depth of experience to continue supporting North Carolina’s recovery and resilience efforts.**

Deloitte’s proven experience in project management, technical assistance, communications, outreach, and environmental services positions us to effectively address the multifaceted challenges of disaster recovery programs. Our team of seasoned, multi-disciplinary professionals has a demonstrated history of delivering immediate and measurable impact for clients facing complex recovery needs.

Our expertise is evidenced by a wide range of successful disaster recovery engagements, including work with HUD-funded programs such as CDBG-DR, CDBG-MIT, HOME, and ESG. We have consistently applied our deep understanding of relevant policies and requirements, leveraging more than 20 years of industry experience to deliver compliant and efficient solutions, as demonstrated in Figure 3.

We are pleased to present examples of similar projects that highlight our ability to deliver results for clients like North Carolina’s Division of Community Revitalization. These examples showcase our experience with programs of comparable type and size, as well as our capacity to navigate regulatory requirements and achieve client objectives. Detailed client narratives are provided below in Table 1, with those marked by an asterisk featuring expanded descriptions in Section 6: Examples (Appendix H).

Table 1: Client Engagements Mapped to RFP Task Numbers

Client	Task Number																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
State of North Carolina (NCPRO)	✓	✓		✓				✓		✓		✓		✓			
City of San Marcos, Texas		✓		✓				✓		✓		✓		✓			
Commonwealth of Puerto Rico (AAFAF)	✓	✓		✓						✓		✓					✓
State of Florida - Public Assistance	✓	✓	✓	✓	✓			✓	✓	✓		✓		✓	✓		✓
State of Texas Department of Housing and Community Affairs (TDHCA)	✓	✓	✓		✓			✓		✓		✓					✓
State of Nebraska (NEMA)	✓	✓	✓	✓	✓			✓		✓		✓		✓	✓	✓	✓
State of Arkansas				✓	✓		✓	✓						✓	✓		
Commonwealth of Pennsylvania Department of Education	✓	✓		✓	✓	✓		✓		✓		✓		✓	✓		

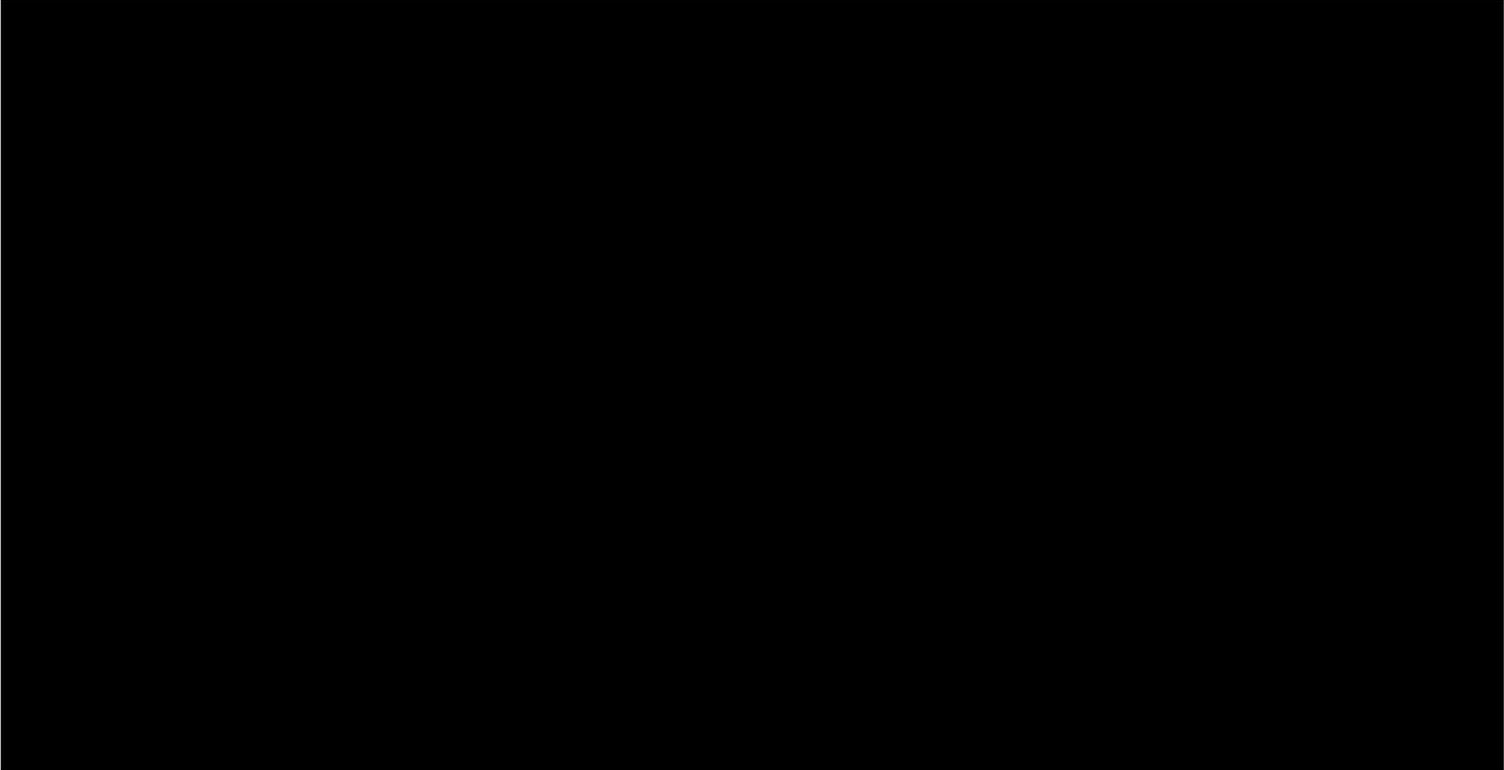
Client	Task Number																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
State of Florida - Elevate*	✓		✓		✓								✓	✓			✓
Commonwealth of Puerto Rico (COR3)*	✓	✓		✓	✓			✓				✓		✓	✓		
State of Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP)*	✓	✓	✓	✓	✓	✓		✓	✓	✓		✓		✓	✓		✓



CITY OF SAN MARCOS, TEXAS
2017 - 2025

Relevant Tasks:

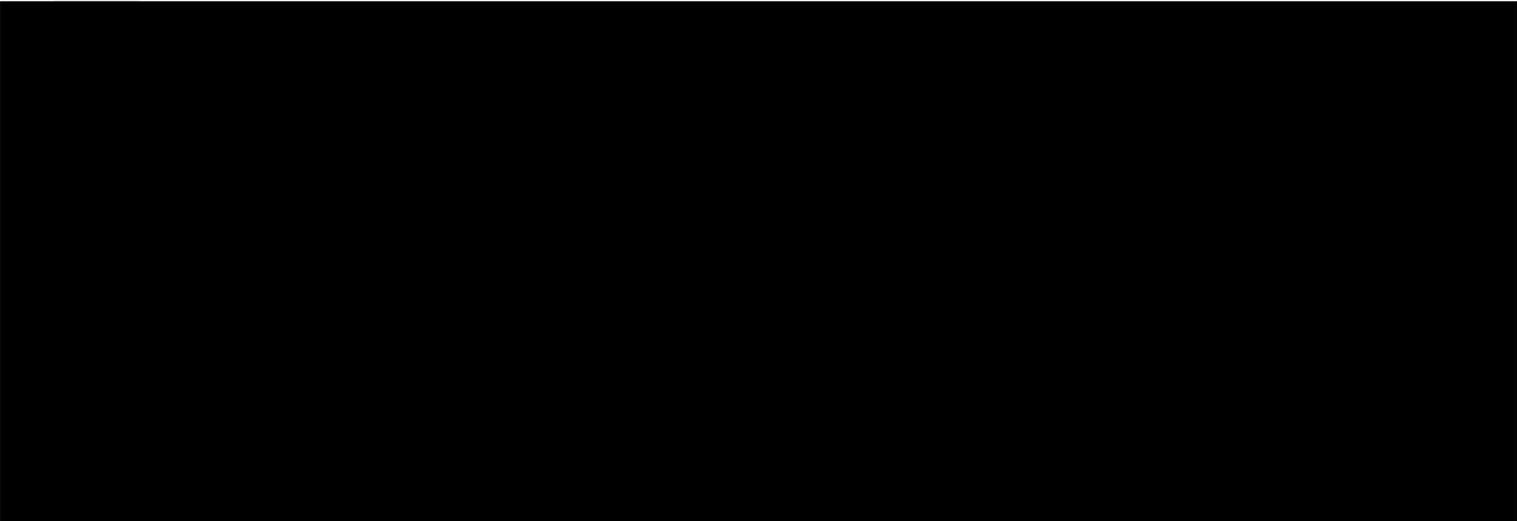
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
	✓		✓				✓		✓		✓		✓	✓		

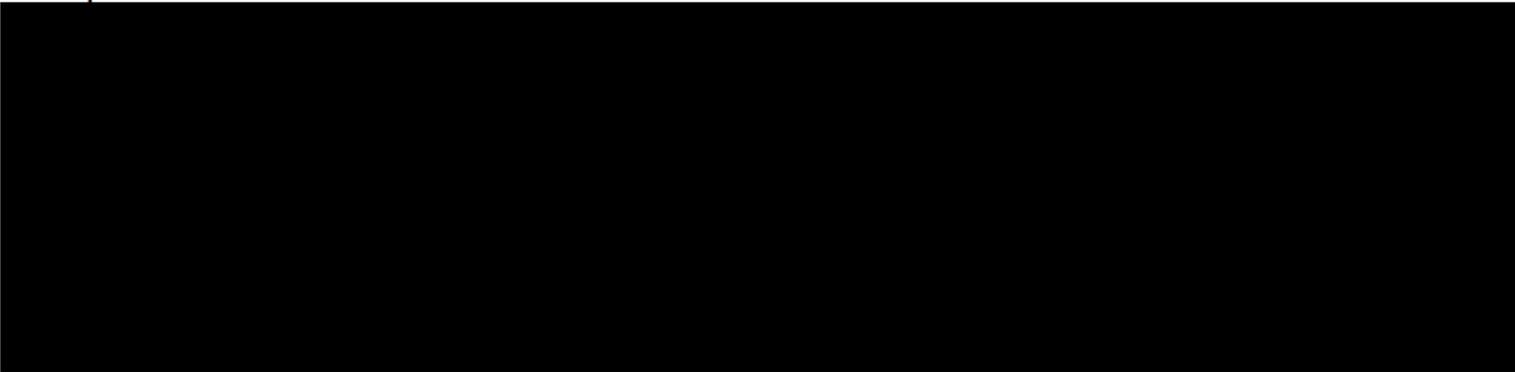


COMMONWEALTH OF PUERTO RICO (AAFAF)
2020 - Present

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓		✓						✓		✓			✓		



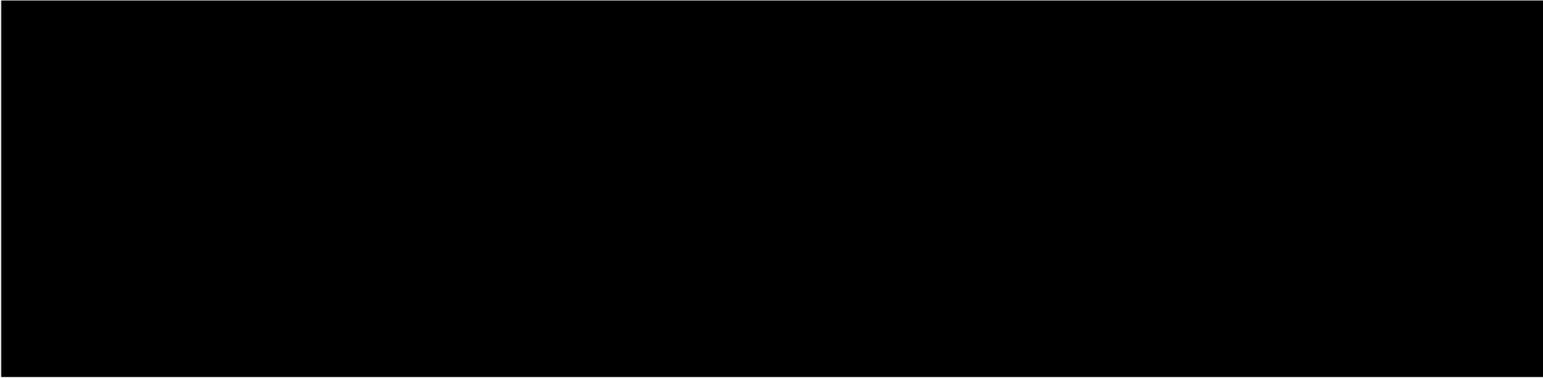


FLORIDA DIVISION OF EMERGENCY MANAGEMENT
JANURARY 2025 - Present

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓



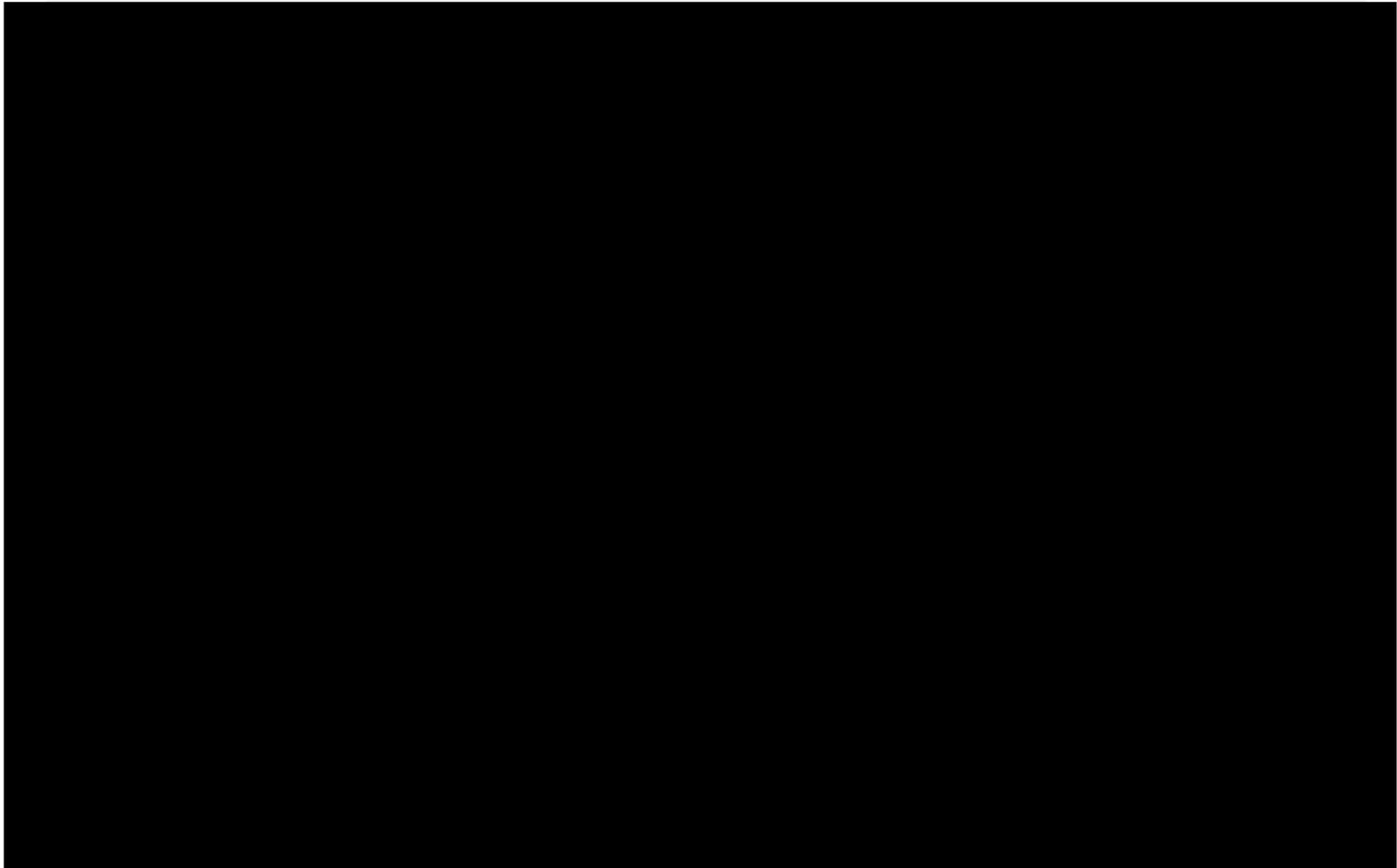


FLORIDA DIVISION OF EMERGENCY MANAGEMENT
2024 - Present

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓	✓	✓	✓			✓	✓	✓		✓		✓	✓		✓

Description of Work:

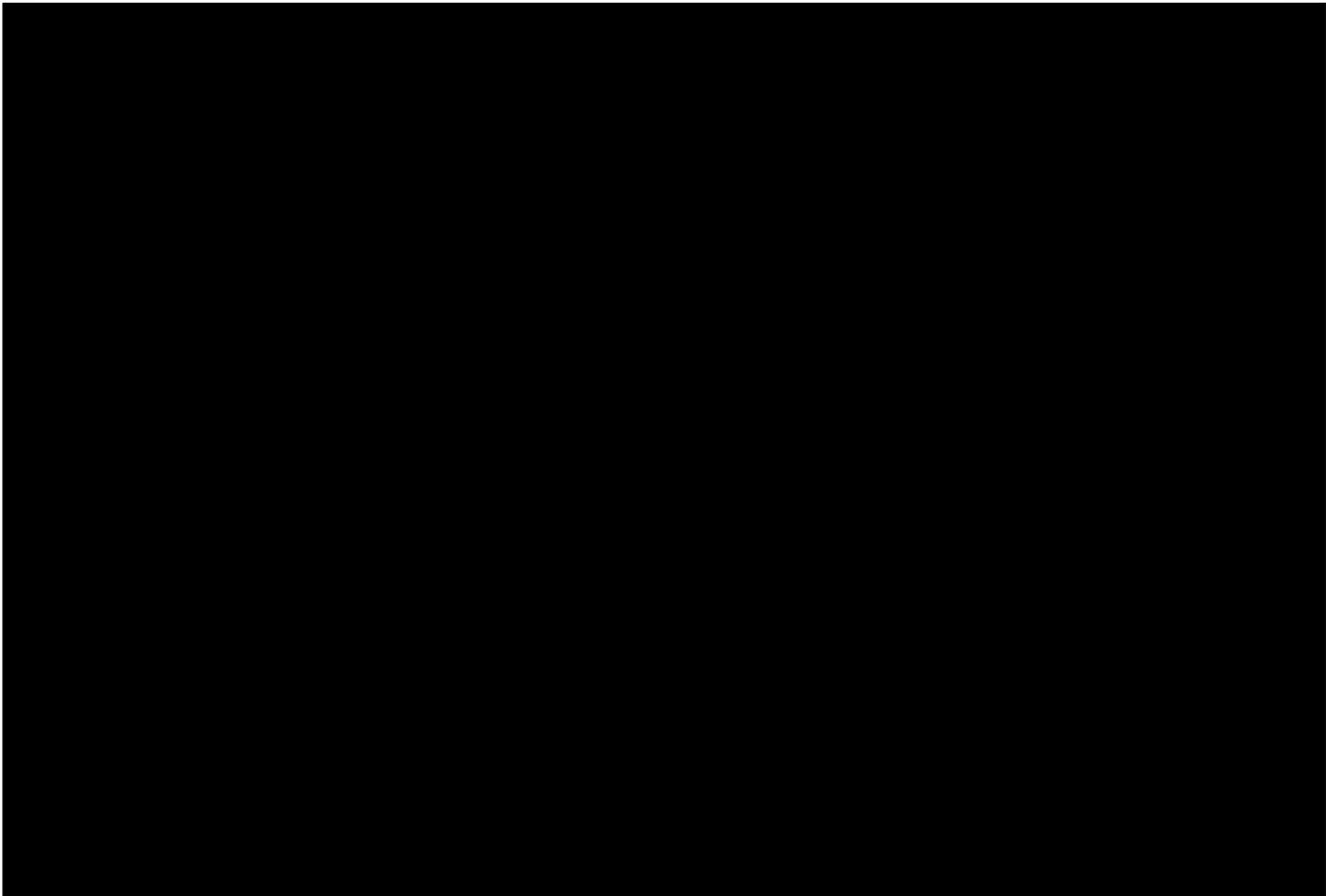


STATE OF TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS (TDHCA)
2021 – 2024

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓	✓		✓			✓		✓		✓				✓	

Description of Work:



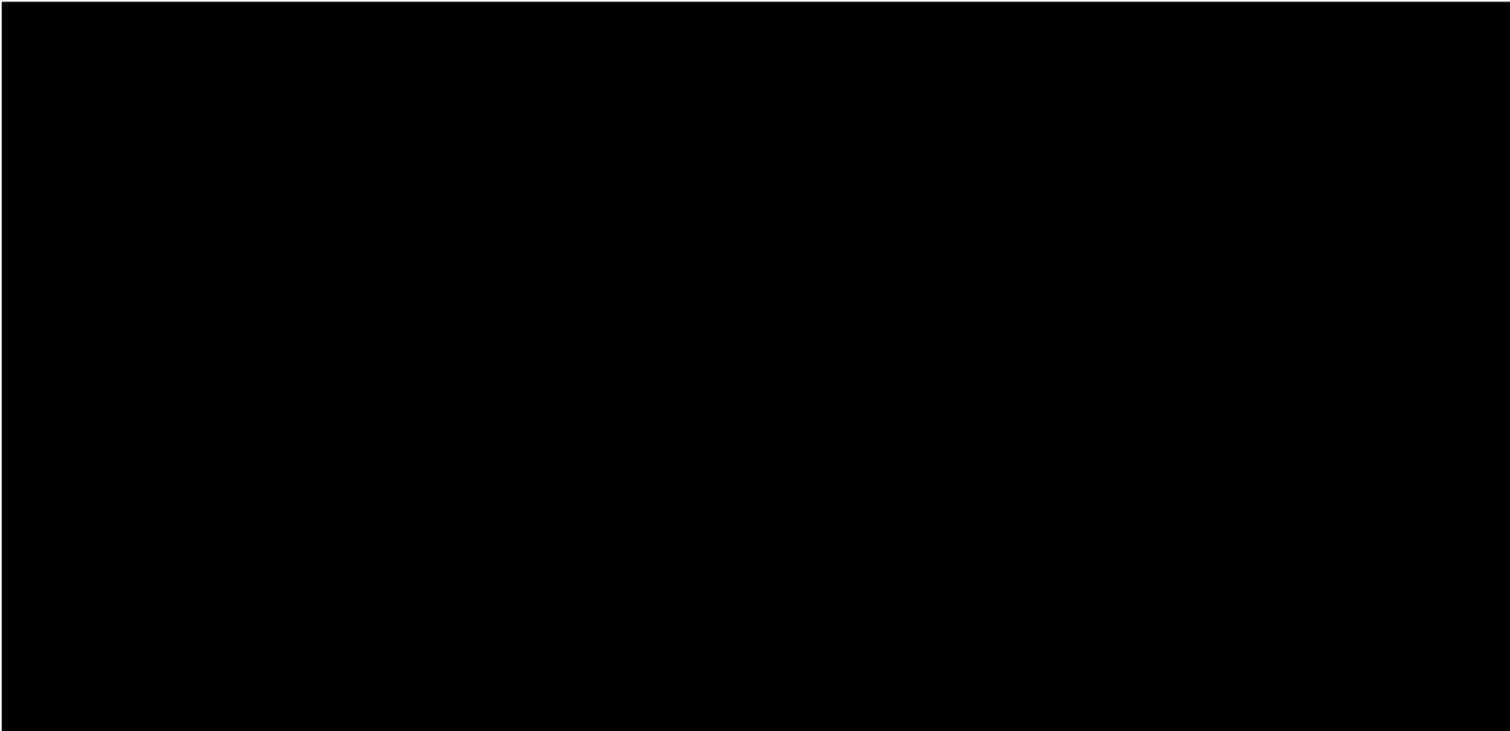
STATE OF NEBRASKA (NEMA)
2020 – Present

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓	✓	✓	✓			✓		✓		✓		✓	✓	✓	

Description of Work:



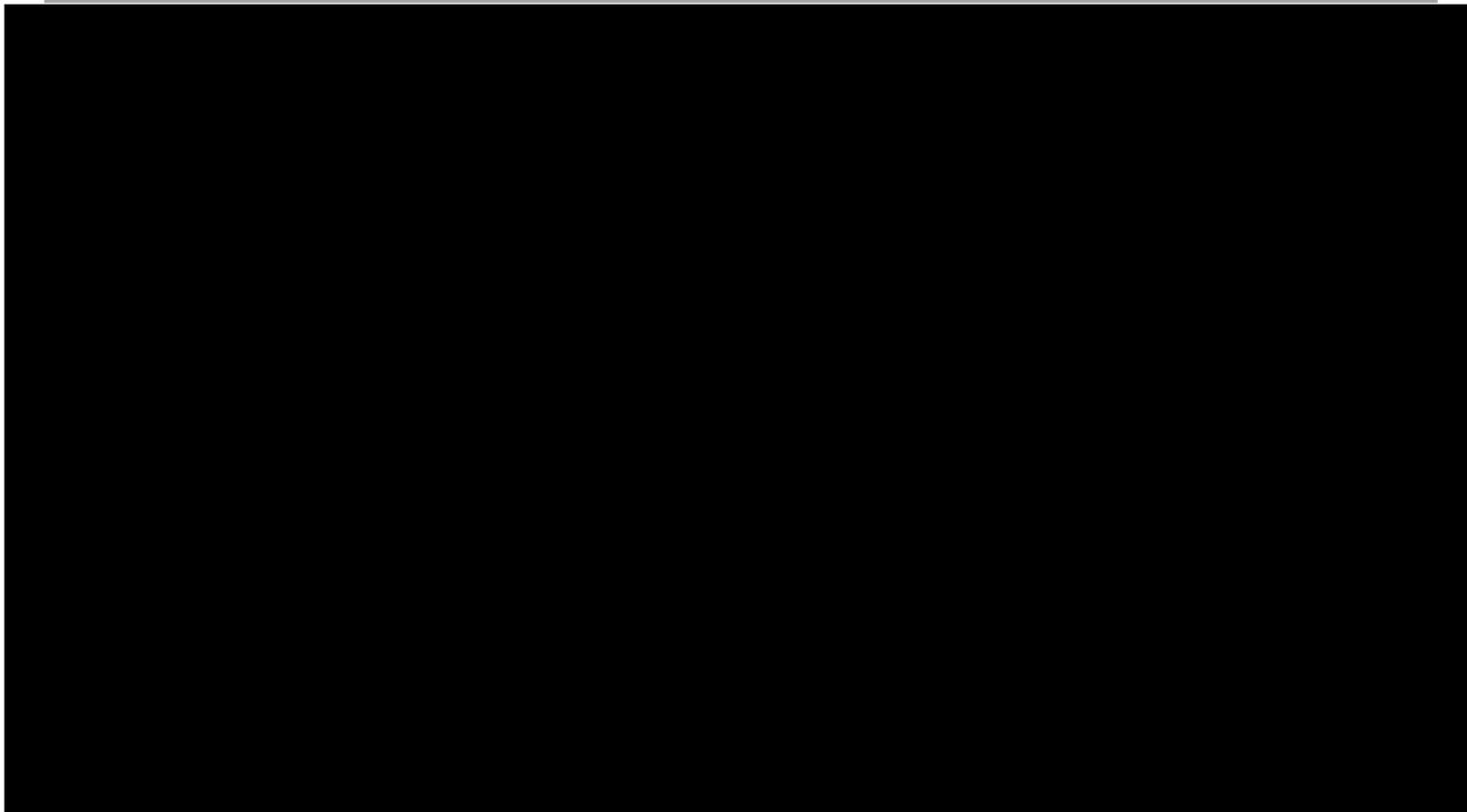


STATE OF ARKANSAS
2021-2022

Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
			✓	✓			✓	✓					✓	✓		

Description of Work:





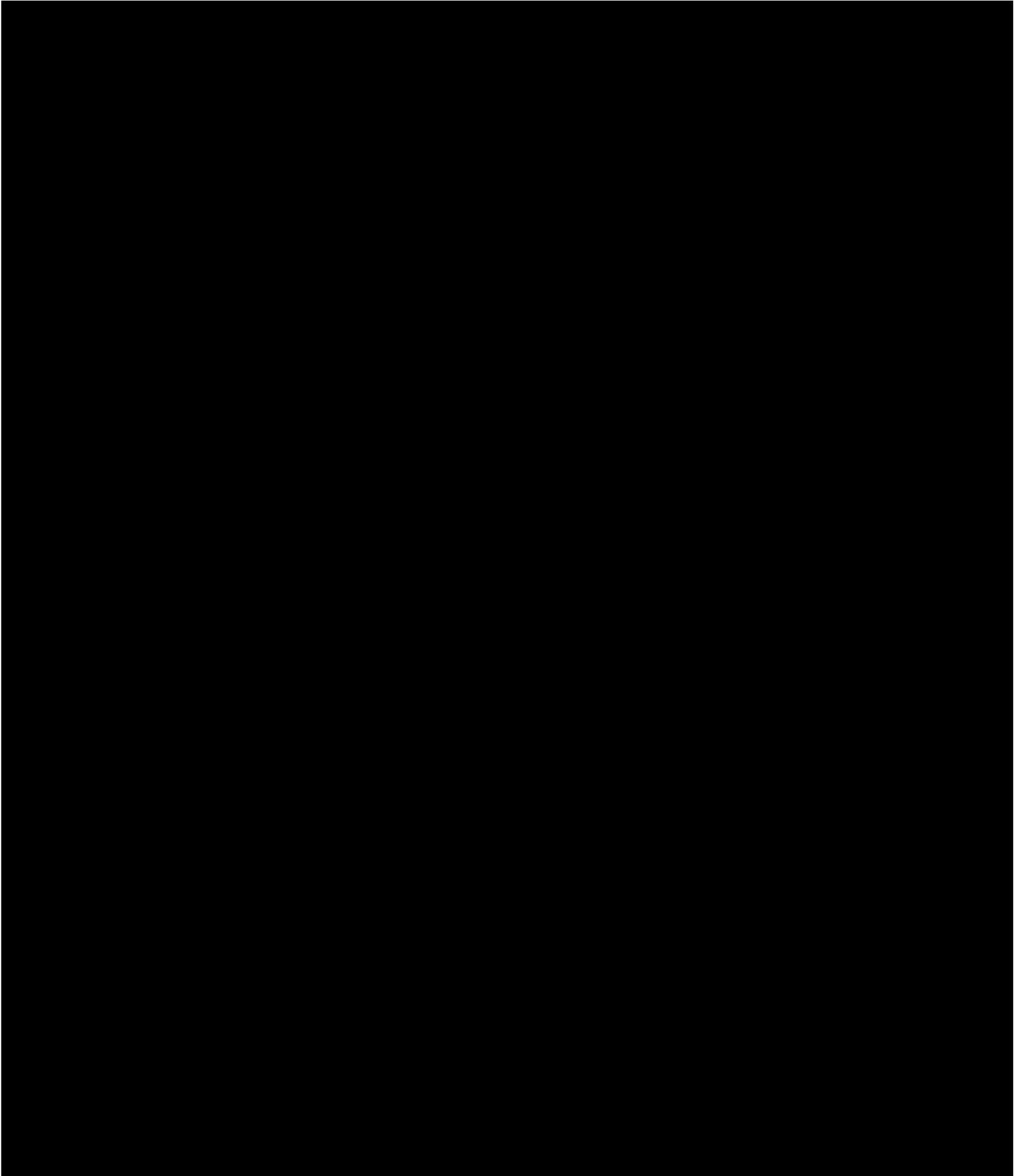
COMMONWEALTH OF PENNSYLVANIA, DEPARTMENT OF EDUCATION
2022-2025

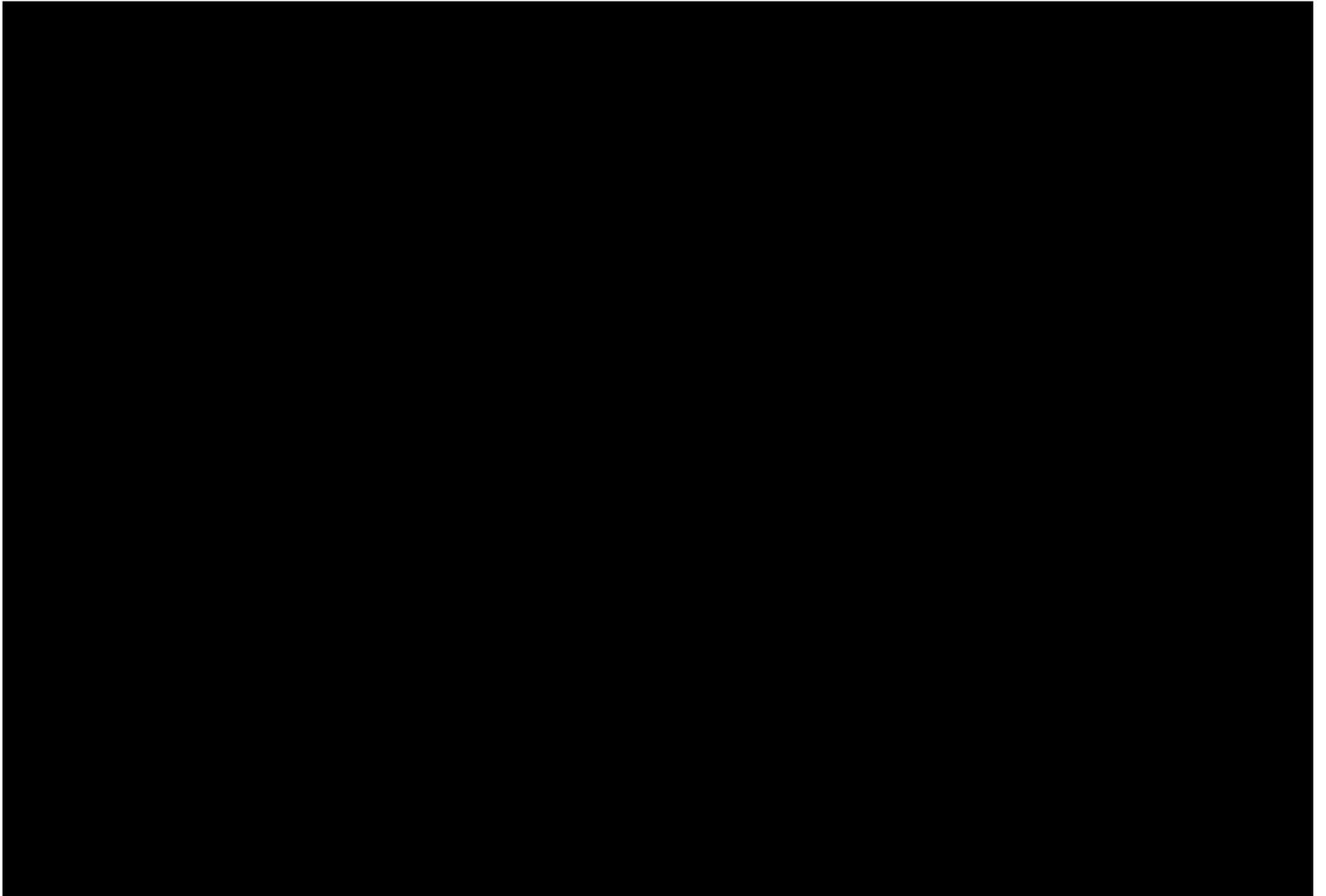
Relevant Tasks:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
✓	✓		✓	✓	✓		✓		✓		✓		✓	✓		



4.3. Deloitte's Approach to Fulfilling Task Orders





4.3.1 Task 1: Development of Policies, Procedures, and Standard Operating Procedures (SOPs)

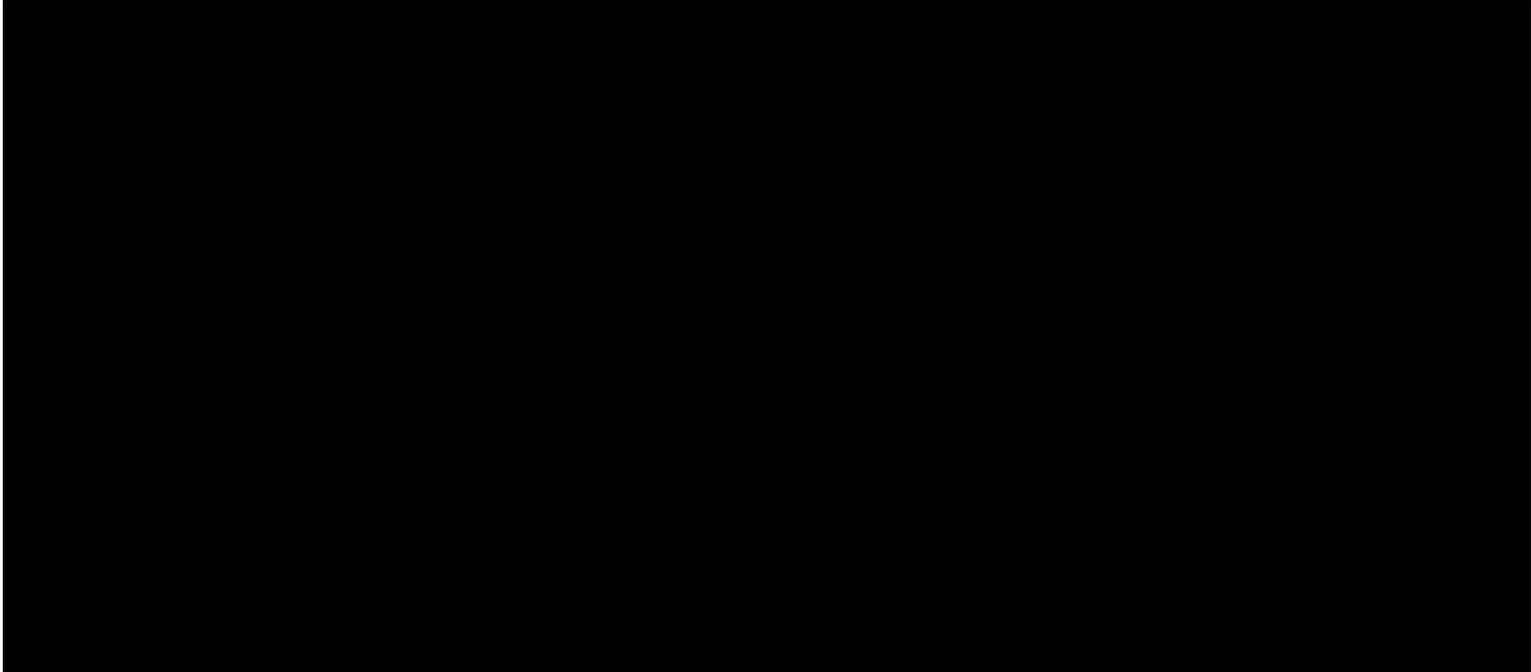
A robust framework of policies, procedures, and SOPs is essential for the compliant, consistent, and transparent administration of CDBG-DR programs. Deloitte’s proven approach supports DCR across all program areas, including single-family housing repair, multifamily rental housing, commercial district revitalization, community infrastructure and resilience projects, private roads and bridges, small rental programs, and general administration of CDBG-DR funds.

Deloitte recognizes North Carolina’s unique challenges as detailed in the state’s Action Plan. The legacy of multiple hurricanes has resulted in a variety of policies that now require harmonization into a unified disaster recovery and mitigation framework.

Our experience supporting states with similarly complex recovery histories positions us to help North Carolina integrate disparate policies into a cohesive, streamlined set of procedures that promote consistency and compliance. Our team brings extensive experience delivering similar services for agencies nationwide, tailoring solutions to diverse program requirements and regulatory environments, helping each policy and procedure to be practical, actionable, and audit ready.



Table 2: Approach for Task 1: Development of Policies, Procedures, and SOPs



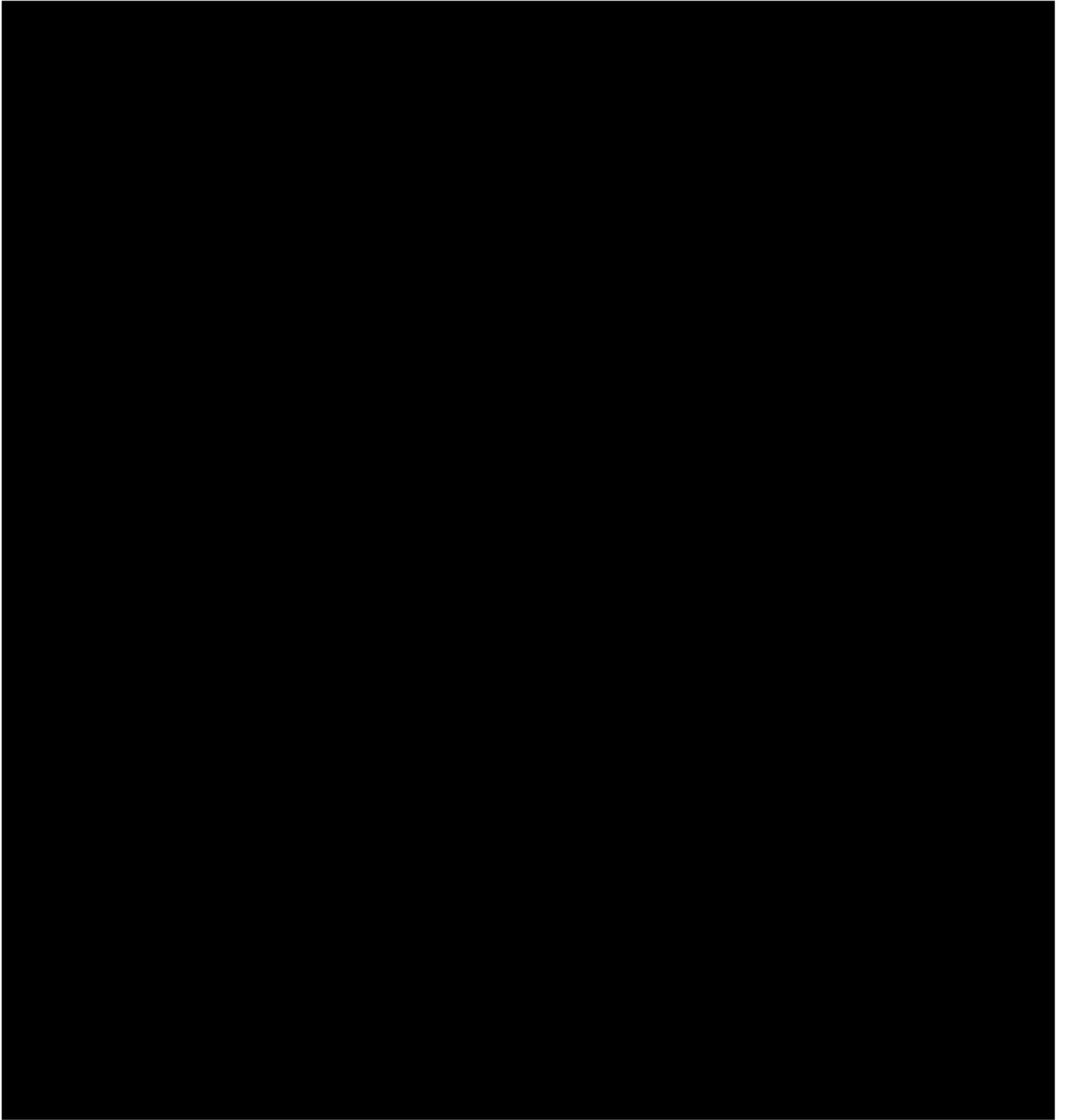


Table 3: Performance and Success Measures

Criteria	Description
Policy Development & Maintenance	Performance and success in policy development and maintenance will be measured by the timely delivery of compliant, actionable policies; the reduction of compliance findings in audits; and positive feedback from DCR staff and program stakeholders.

Procedure Implementation	Our team will monitor the effectiveness of procedure implementation by assessing staff proficiency through post-training evaluations and periodic skills assessments, allowing us to address gaps proactively.
Staff SOP Trainings	Success will be measured by timely rollout and adoption of SOPs, demonstrated staff proficiency, and a measurable reduction in process-related errors or delays, contributing to the overall effectiveness and accountability of CDBG-DR program delivery.

Table 4: Task 1 Specialist Spotlights

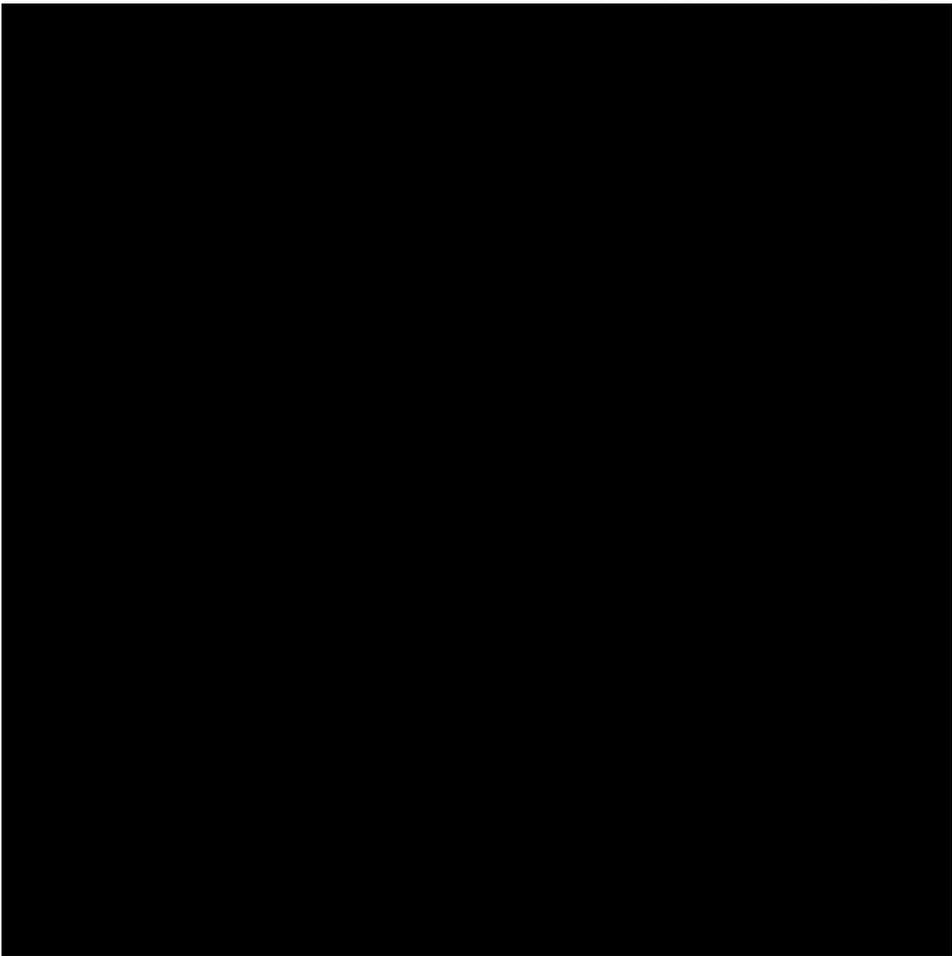
Name	Experience with Similar Requirements
 <p>Kelley Grow Senior Manager</p> 	<p>Kelley is a Senior Manager based in North Carolina with over 15 years of grants management and financial management experience across Federal and state agencies, including HUD and the State. She has built process blueprints for NC’s Department of Environmental Quality’s state-wide Home Energy Rebate (IRA Section 50121 and 50122) to support climate and socio-economic goals in reducing energy burdens for low-to-moderate income (LMI) North Carolinians. She has experience creating workflows for end-to-end grants and financial management processes such as travel programs or eligibility processes, documenting internal controls and building QA/QC processes and SOPs for Project Management, Risk and Compliance, and Information Technology units. This experience will enable DCR to develop clear, comprehensive documentation—an essential foundation for implementing a program that meets compliance standards and supports long-term operational integrity</p>
 <p>Yara Ibrahim Manager</p> 	<p>Yara is a skilled manager with extensive experience managing a diverse range of grants, including FEMA, ARPA, and state grants in Louisiana. She assists parishes in establishing grant governance, covering the entire process from grant identification to closeout. Yara engages in stakeholder interviews, policy review and development, eligibility assessment of expenses, and evaluation of financial and grant management systems. She also creates executive dashboards and structures that enhance an entity’s capacity to manage grants effectively.</p>

 = proposed key personnel

4.3.2 Task 2: Financial Compliance, Oversight, and Fraud Prevention

Effective financial compliance, robust oversight, and proactive fraud prevention are essential to safeguarding disaster recovery funding and maintaining public trust. As North Carolina mobilizes resources in response to natural disasters, DCR must provide for CDBG-DR funds that are allocated, tracked, and protected from fraud, waste, and abuse. Deloitte’s proven approach delivers end-to-end financial compliance and advanced fraud prevention solutions, tailored to DCR’s regulatory needs and risk profile.

Deloitte understands the complexities of managing significant federal funds across multiple accounts and the risks this entails, such as miscoding and cash-management errors. Our team brings deep experience supporting agencies nationwide with large-scale federal funding streams. For example, we have helped the Commonwealth of Pennsylvania Department of Education and the Commonwealth of Puerto Rico (COR3) design and implement robust fund allocation and reconciliation processes, mitigating errors and facilitating accurate, timely reporting across complex funding structures. Deloitte has also strengthened sub-recipient oversight, a common audit issue including for North Carolina, for clients like the FDEM and the State of Louisiana Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP) by implementing risk-based monitoring frameworks, standardized documentatio



experience is complemented by our current work supporting FEMA in fraud detection by leveraging advanced analytics, program integrity expertise, and robust case management processes to identify, prevent, and respond to fraudulent activities within disaster recovery programs. Our teams have implemented data-driven monitoring and risk scoring tools to proactively flag suspicious claims and transactions, enabling timely investigation and resolution. By integrating these capabilities into FEMA’s Public Assistance and Hazard Mitigation programs, Deloitte has helped safeguard federal funds, enhance compliance, and maintain public trust throughout the recovery process.

For TDHCA, Deloitte leveraged advanced analytics, automation, and AI-powered detection to proactively identify compliance gaps, reduce risk exposure, and respond swiftly to potential FWA. Our methodology begins with a thorough review of DCR’s financial management policies and procedures, benchmarking against HUD, state, and federal requirements such as 2 CFR Part 200 and the CDBG-DR Financial Management Handbook. We collaborate with DCR stakeholders to design robust governance frameworks, clear roles and responsibilities, and risk mitigation processes that enhance compliance and transparency.

Deloitte will deploy financial performance dashboards, Key Performance Indicator (KPI) tracking systems, and standardized reporting structures to provide stakeholders—including HUD, auditors, state leadership, and the public—with transparent insights into fund allocation and safeguards. Our comprehensive fraud risk management framework integrates people, processes, technology, and security, leveraging advanced analytics and AI to prevent, identify, and respond to FWA. By deploying innovative tools and proven methodologies, Deloitte empowers DCR to maintain financial integrity, strengthen compliance, and facilitate disaster recovery funds efficiently reaching those truly eligible.

Table 5: Approach for Task 2: Financial Compliance, Oversight, and Fraud Prevention

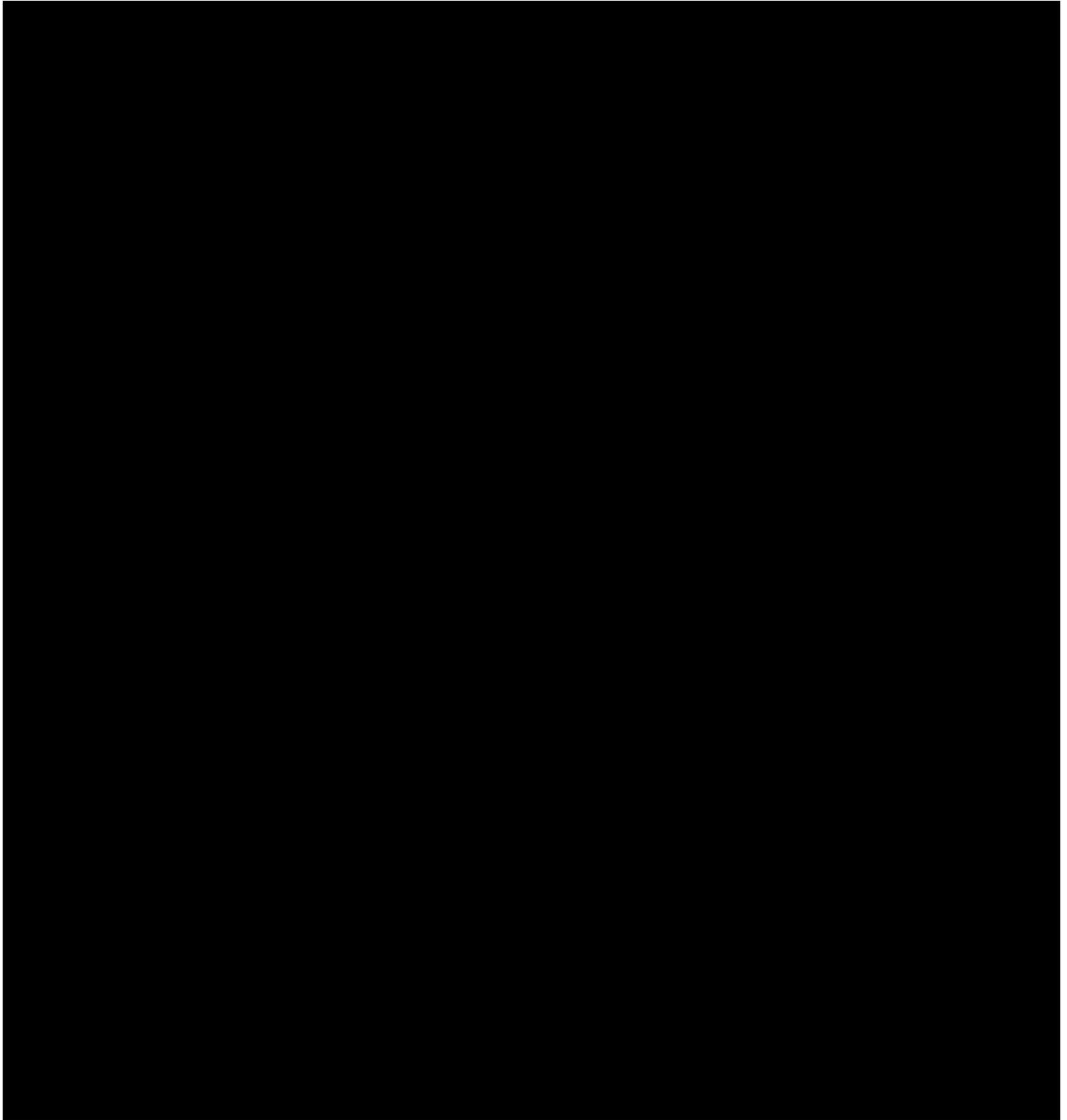


Table 6: Performance and Success Measures

Criteria	Description
Compliance	Processes and documentation are rigorously maintained to help facilitate adherence to established standards and compliance with applicable federal, state, and local regulatory requirements, as demonstrated by successful audits and minimal findings.
Monitoring	Reports will be thoroughly completed and delivered in a comprehensive and timely manner according to agreed-upon deadlines, with any anticipated delays proactively communicated to stakeholders in advance.
Financial Reporting	Financial reports are prepared accurately and comprehensively, providing clear and transparent insight into financial performance
Fraud Prevention	Fraud prevention protocols are developed, implemented, and verified as operating as intended through stakeholder engagement and regular audits and testing.

Table 7: Task 2 Specialist Spotlight

Name	Experience with Similar Requirements
 Dermot O'Reilly Specialist Leader	Dermot O'Reilly is a highly skilled specialist leader with over 30 years of experience in federal criminal investigations and helping State and Federal agencies in the prevention, detection, and mitigation of fraud risks. Dermot currently leads client service teams delivering advanced analytics and investigative services designed to identify and address instances of fraud impacting a wide range of government services. Dermot is also assisting in designing and implementing a comprehensive fraud risk prevention and mitigation program that is helping FEMA accurately characterize and proactively address fraud risks across its disaster and hazard mitigation assistance programs.
 Lauren Malley Manager	Lauren Malley is a licensed Certified Public Accountant (CPA) with over 10 years of experience specializing in Accounting, Investigations, and Fraud, Waste, and Abuse (FWA) Prevention. Lauren previously worked in Deloitte's Commercial Audit practice leading audit teams and serving PCAOB and AICPA clients focusing on complex financial reporting and internal controls. She currently helps State clients in designing anti-FWA programs to identify, detect, and prevent instances of Fraud, Waste, and Abuse (FWA) through advanced analytics and investigative techniques. Lauren supported the State of Texas' Emergency Rental Assistance Program (ERAP) to provide Anti-Fraud Policy, Advanced Analytics, Financial Monitoring, and FWA Investigations.
 Madison Moreau Analyst 	Madison is an accomplished analyst specializing in grants management, strategic planning, and infrastructure finance. She has supported state and territorial agencies—including the Arkansas Department of Finance & Administration, the Puerto Rico Fiscal Agency and Financial Advisory Authority, and the Pennsylvania Department of Education—by conducting detailed funding research, coordinating grant applications, and providing compliance monitoring and closeout support for large-scale federal programs. Madison's expertise spans energy, broadband, and education sectors, where she excels at synthesizing complex information, facilitating stakeholder communications, and delivering high-quality, actionable insights to advance client priorities.

 = proposed key personnel

4.3.3 Task 3: Duplication of Benefits (DOB) Compliance

Effective Duplication of Benefits (DOB) compliance is essential to providing the equitable, efficient distribution of CDBG-DR funds while also maintaining alignment with HUD guidance, Section 312 of the Stafford Act, and federal cost principles. Deloitte’s extensive experience in DOB policy management, reviews, and quality assurance for disaster recovery programs—including our current work with the Elevate Florida Program—positions us to deliver robust, tailored solutions for DCR. Our approach integrates policy expertise, advanced analytics, and proven tools to proactively prevent, detect, and monitor DOB risks throughout the program lifecycle.

Deloitte understands North Carolina’s unique challenges, particularly the high concentration of SBA disaster loans and NFIP payouts that require complex, real-time data matching for accurate eligibility and benefit calculations. We recognize that delayed FEMA data feeds can impede timely DOB corrections and increase recapture risk. Our team’s deep familiarity with these issues enables us to design targeted solutions that address these specific pain points.

We will collaborate closely with DCR to develop, maintain, and implement DOB prevention policies and SOPs that reflect the latest federal HUD and state requirements. Deloitte will establish a centralized framework for policy management, version tracking, and document control, so that all templates, forms, and workflows are accessible and consistently applied. Our methodology emphasizes stakeholder engagement, leveraging input from program managers and reviewers to tailor policies and workflows to North Carolina’s CDBG-DR needs. To support consistent eligibility determinations, Deloitte will deploy standardized templates and fact sheets for applicant certification and documentation of disaster-related assistance. Our **DOB Calculation Tool**, refined through experience in multiple public programs, will be adapted for DCR to track external funding, calculate awards, and reconcile gap funding. This tool enables real-time tracking and documentation of DOB for every application, supporting accurate award determinations and HUD compliance.

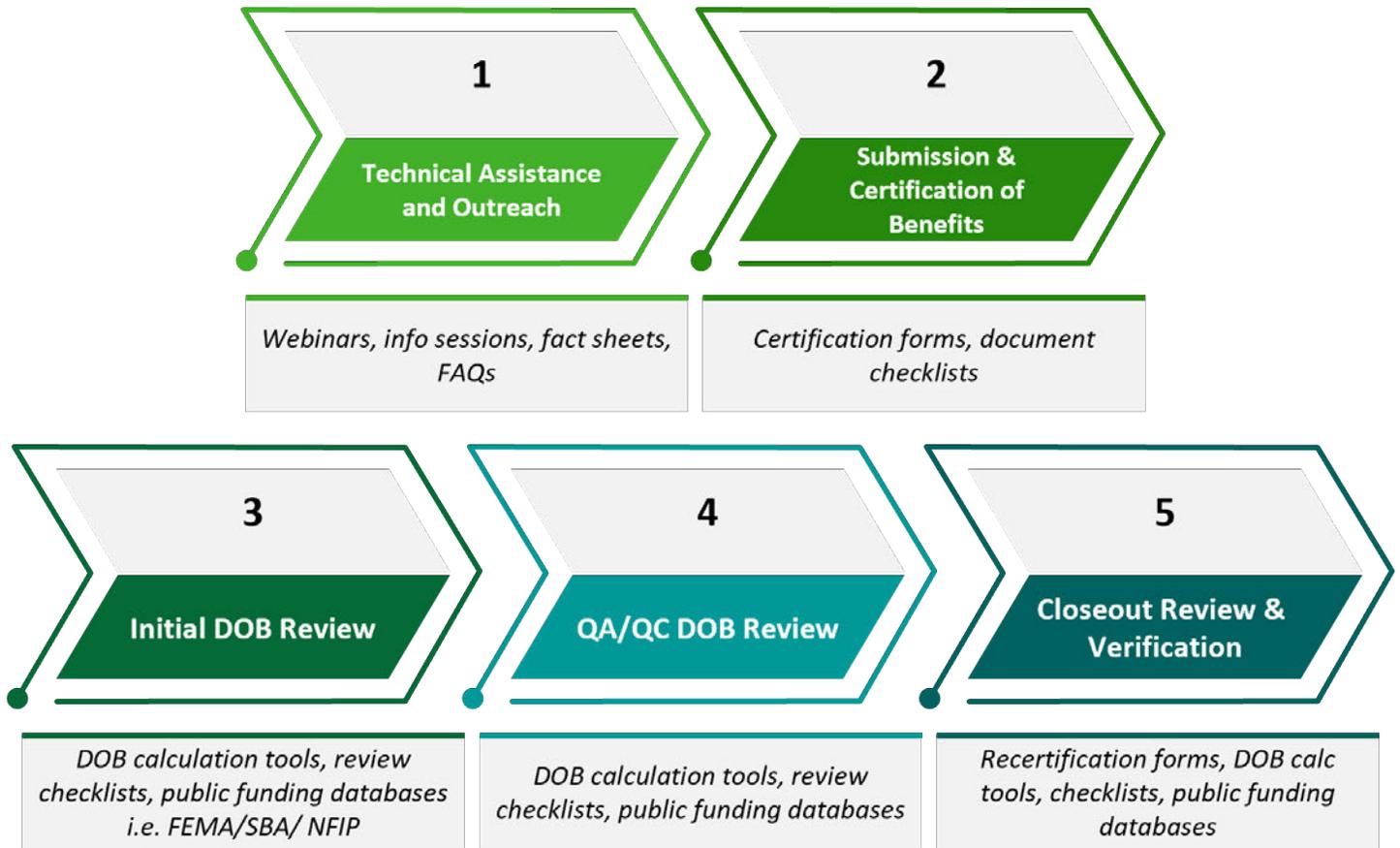


Figure 5: DOB Compliance Process Flow

Deloitte’s advanced data matching tools and integrated analytics platforms validate applicant data against FEMA, SBA, and insurance databases—even when data feeds are delayed. Automated reconciliation and exception handling facilitate timely DOB corrections, minimizing recapture risk. We also provide technical assistance, training, and outreach to educate stakeholders, reinforcing program integrity and transparency. Continuous improvement is embedded in our approach, helping DCR benefit from a comprehensive, compliant, and efficient DOB prevention and monitoring program.

Table 8: Approach for Task 3: Duplication of Benefits (DOB) Compliance



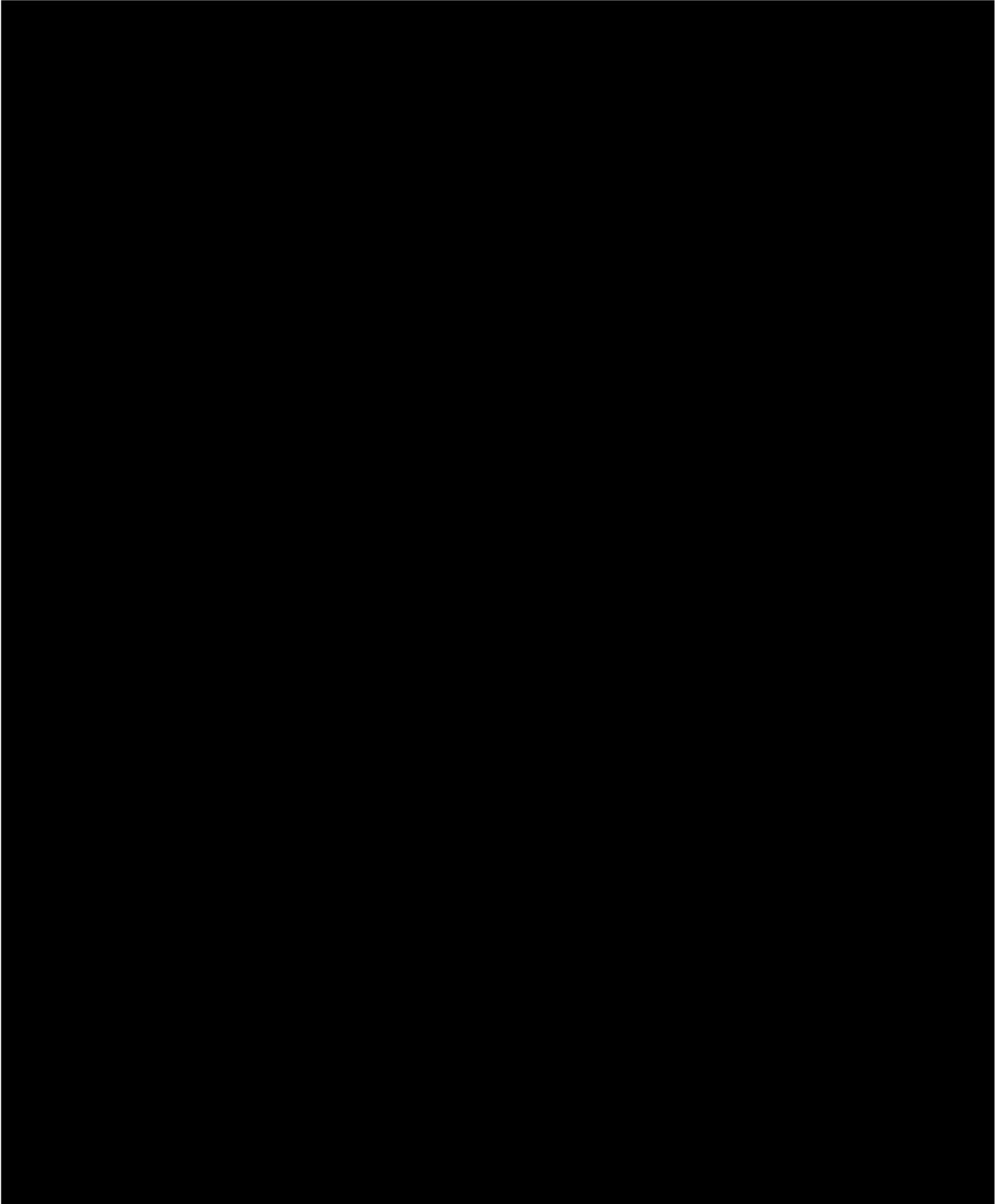


Table 9: Performance and Success Measures

Criteria	Description
Work products, templates, workflows, DOB Calculation tools	Success and performance for work products related to DOB will be measured by their ability to accurately detect and calculate DOB and award amounts with the goal of preventing any instances of DOB for all program applications. It will also be measured by adoption and implementation of templates in alignment with project timelines and federal, state and local regulations regarding Duplication of Benefits.
Outreach & Technical Assistance	Successful outreach and technical assistance will be illustrated by applicants' understanding of DOB compliance and regulations and proper submission of program required documentation to identify instances of DOB. Performance will be evaluated based on stakeholders' engagement in webinars or information sessions performed and evaluated against instances of correctly identified DOB, and accurate and compliant self-reporting on current and anticipated benefits.
Policies & SOPs	Success and performance in policy and SOP development will be measured by tracking the accuracy of benefit determinations, the rate of compliance with federal guidelines, and the minimization of audit findings or corrective actions related to DOB issues.

Table 10: Task 3 Specialist Spotlight

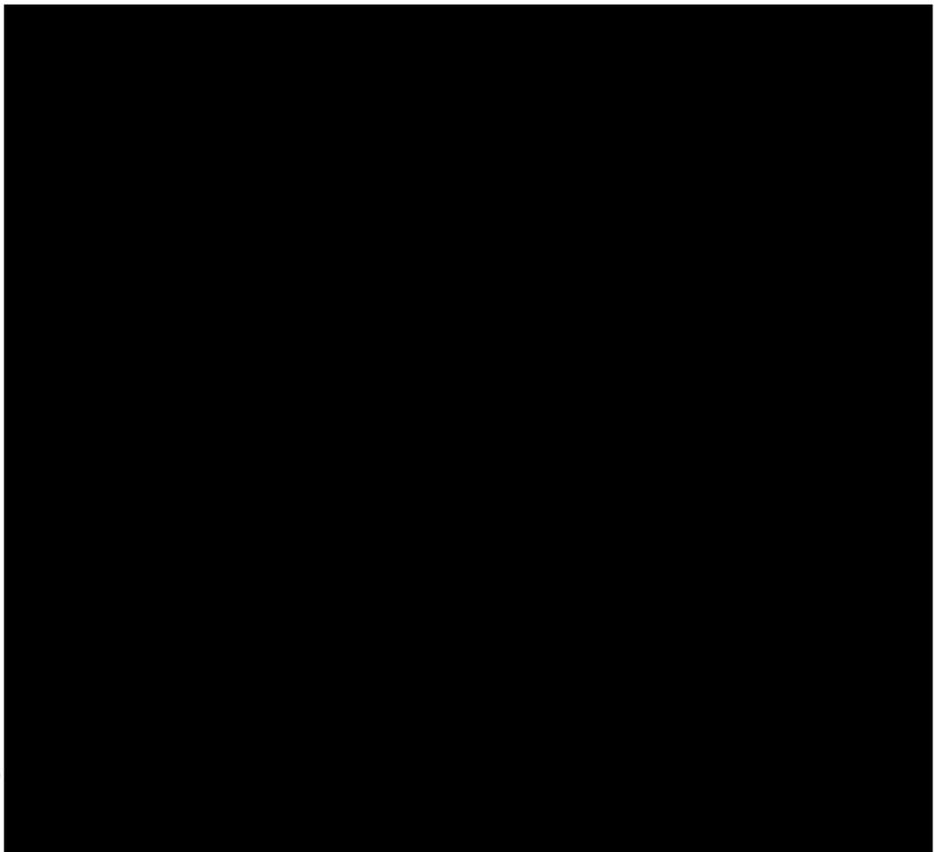
Name	Experience with Similar Requirements
 <p>Inah Hong Manager</p>	<p>Inah Hong is an experienced professional specializing in DOB policy and review within disaster recovery programs. For the State of Florida Hazard Mitigation Assistance grant program, she informed programmatic policies for DOB, mapped comprehensive program guidelines and review processes, and led a webinar to educate stakeholders on DOB requirements. Inah's DOB review work encompasses evaluating assistance from NFIP and private insurance, increased cost of compliance, SBA loans, and other sources of disaster recovery funding. Her expertise emphasizes compliance and improves the effectiveness of grant resources for impacted communities.</p>

4.3.4 Task 4: Procurement Compliance and Monitoring

Transparent, fair, and compliant procurement is essential for the responsible use of disaster recovery funds and the success of CDBG-DR programs. Deloitte brings extensive experience supporting public sector organizations in establishing procurement compliance and monitoring frameworks that meet both federal and state requirements, with a focus on disaster recovery and grant-funded programs. We recognize that North Carolina’s procurement landscape is uniquely complex, requiring reconciliation of NC General Statutes with federal 2 CFR 200 regulations, which can create compliance challenges. Additionally, we understand that many local sub-recipients lack written procurement policies, increasing the risk of heightened HUD monitoring and potential audit findings.

Deloitte’s experience spans the full spectrum of procurement activities, including policy review and design, implementation, and ongoing oversight. We have guided agencies through federal audits, supported transitions to new compliance protocols, and developed monitoring systems that enhance transparency and accountability. This positions us to address NC DCR’s needs with solutions that are compliant, auditable, and adaptable to North Carolina’s evolving recovery priorities.

Our approach is grounded in proven practices and tailored to each engagement’s objectives. We begin with a comprehensive assessment of the procurement environment, engaging stakeholders to understand current processes, statutory constraints, and areas of risk. By reviewing documentation and workflows, we identify opportunities for improvement and compliance gaps, including those that arise from reconciling state and federal frameworks and from local sub-recipients’ lack of written policies. Leveraging our knowledge of federal guidance, state regulations, and recent audit findings, we develop accessible, robust policies that enable DCR and its sub-recipients to maintain strong oversight and transparency.



Top 10 Procurement Risks

- Absence of comprehensive written procurement policies and procedures
- Insufficient competition in procurement processes
- Inadequate or improper justification for sole source procurements
- Failure to verify contractor and vendor eligibility
- Missing or incomplete required contract provisions
- Inadequate documentation of procurement activities and decisions
- Noncompliance with established procurement thresholds
- Violations of conflict-of-interest policies
- Insufficient cost or price analysis to support procurement decisions
- Failure to adhere to specific grant requirements and conditions

Deloitte integrates training and reference materials into the policy framework, supporting consistent implementation. Guidance documents and training sessions—delivered in-person or virtually—help staff and sub-recipients apply procedures and address common questions. Real-time tracking tools and reporting systems provide leadership with visibility into procurement, vendor performance, and risk indicators, supporting informed decision-making and timely remediation.

Table 11: Approach for Task 4: Procurement Compliance and Monitoring

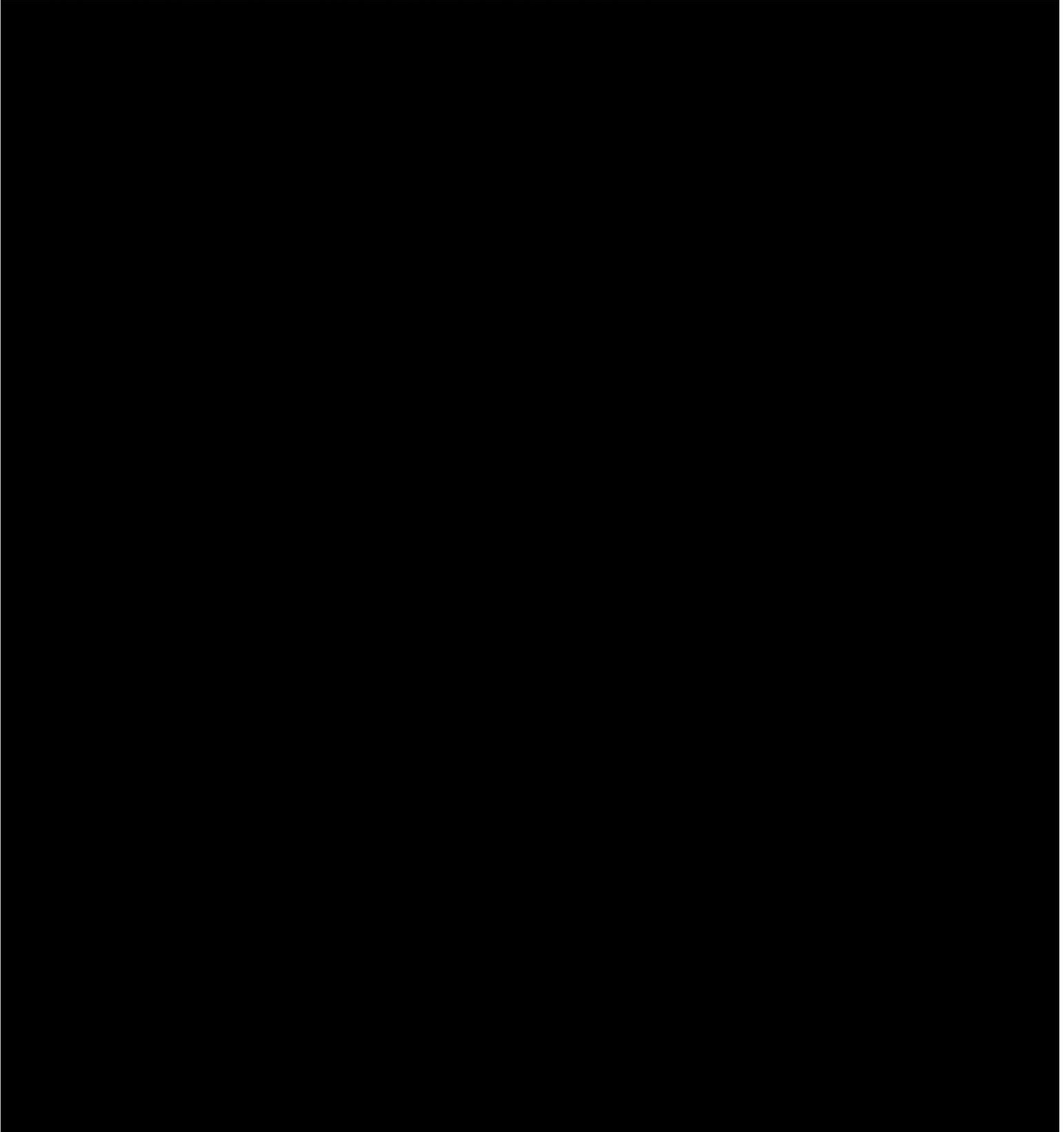


Table 12: Performance and Success Measures

Criteria	Description
Policy Development	Develop comprehensive and well-defined policies to support NC DCR in maintaining full compliance with federal, state, and local regulations. These policies will help mitigate compliance risks while enhancing oversight and transparency in the management and allocation of funds.
Training	Deliver targeted training and development programs to equip staff with a thorough understanding of policies and procedures. Additionally, create accessible reference materials to support staff in their daily operations and ongoing compliance and efficiency.
Compliance Monitoring	Design comprehensive checklists and assessment tools to enable NC to effectively monitor its compliance progress. Additionally, develop dashboards and tracking systems that provide real-time updates on NC’s adherence to local, state, and federal regulations, thereby enhancing transparency and informed decision-making.

Table 13: Task 4 Specialist Spotlight

Name	Experience with Similar Requirements
 Ameyali Salazar Manager	Ameyali is a Project Management Professional with over five years of experience in project management, grant compliance, and financial risk mitigation. Skilled in leading multi-team operations to execute virtual and on-site monitoring reviews, technical assistance, and grant close-out activities, with a strong focus on procurement compliance and adherence to regulatory requirements. Proficient in stakeholder communications and training, including presenting compliance findings and industry leading practices to clients and subrecipients at conferences and technical assistance townhalls, and navigating complex procurement-related issues for resolution.
 Ibrahim Almatrri Senior Consultant	Ibrahim specializes in grants management, disaster recovery, and project management for government and public sectors. His expertise includes conducting detailed and comprehensive risk assessments for subrecipients of federal funding, supporting their adherence and compliance with federal, state, and local regulations. Ibrahim has a proven track record of leading intricate subrecipient monitoring visits, where he offers hands-on oversight and strategic guidance to improve program effectiveness and help manage risk to address compliance gaps and strengthen program effectiveness. He developed comprehensive risk assessments and data-driven monitoring strategies, enabling targeted oversight and improved training for grant recipients. Ibrahim has facilitated the procurement review and closeout process for federally funded disaster recovery projects, maintaining accurate documentation, eligibility of expenses, and timely resolution of compliance issues.
 Madison Stone Analyst 	Madison Stone is an experienced grant management analyst with specialized expertise in procurement compliance and monitoring for federally funded programs. At Deloitte, she supports the Division of Emergency Management and the Office of the Secretary of Infrastructure by guiding departments through procurement processes for FEMA Public Assistance and infrastructure grants, facilitating strict adherence to 2 CFR 200 and federal requirements. Madison has a proven track record of managing vendor selection, contract administration, and documentation to maintain regulatory compliance and transparency. Her background includes overseeing procurement activities for multimillion-dollar hazard mitigation projects, developing inventory management systems, and coordinating with internal and external stakeholders to optimize procurement operations.

 = proposed key personnel

4.3.5 Task 5: Approach for Claims, Appeals, and Case Reviews

Accurate, equitable, and compliant management of claims, appeals, and case reviews is critical to the integrity of CDBG-DR programs. Deloitte brings proven experience assisting state and local agencies in addressing these issues through robust, scalable processes for eligibility determinations, duplication of benefits, and federal compliance.

Our approach integrates standardized protocols, advanced technology, and comprehensive training to streamline case management, facilitate fairness, and support audit readiness. We develop detailed review checklists and protocols to guide staff through eligibility verification, benefit calculations, and documentation checks, promoting consistency and defensibility even in high-volume, backlog situ

homeowner appeals from Hurricane Florence disaster recovery. For appeals, Deloitte implements transparent processes with clear communication channels, defined timelines, and escalation protocols for complex or delayed cases. Regular trend analyses help identify root causes of appeals backlogs and documentation inconsistencies, enabling targeted corrective actions and improving applicant experience.

Quality assurance is central to our methodology. Deloitte conducts secondary reviews of flagged cases to confirm decisions are well-supported, documented, and audit-ready, directly addressing risks to fair-hearing standards. Our technology solutions—including case management systems, automated workflow tools, and rule-based decision engines—centralize applicant data, automate eligibility determinations, and reduce manual errors, helping documentation remain complete and accessible. Secure document management and applicant communication portals enhance transparency and trust, while scalable infrastructure supports surges in activity and backlog reduction.

Comprehensive audit trails and reporting dashboards provide real-time insights into review outcomes, appeals volumes, and resolution times, supporting data-driven program management. Our knowledge management ecosystem—including centralized resources, virtual help desk, and proactive change management— helps provide staff timely access to guidance and updates. Deloitte's commitment to quality assurance and continuous improvement empowers DCR to resolve backlogs, uphold fair-hearing standards, and deliver disaster recovery programs that are resilient, compliant, and trusted by the communities they serve.

Table 14: Approach for Task 5: Claims, Appeals, and Case Reviews

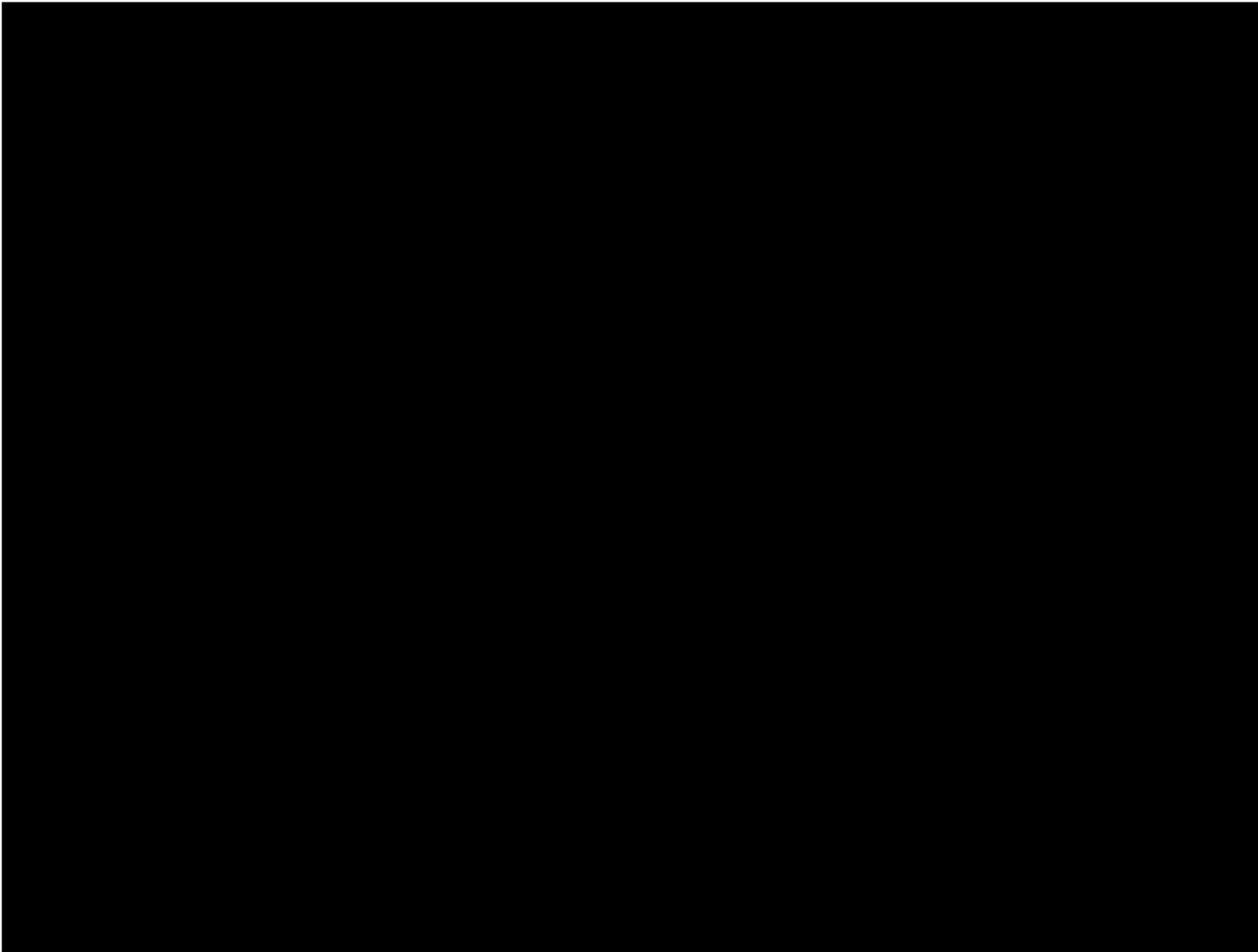
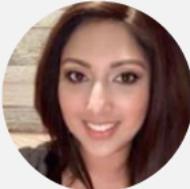


Table 15: Performance and Success Measures

Criteria	Description
Staff Training implemented for consistent review procedures	Training events, Knowledge Articles, Q and A documents, and other support will document successful implementation of Training for Project Staff to consistently implement the review process.
Case Review Documentation Templates will be implemented	Documentation tools, including checklists, decision logs, and other templates will be used to consistently and uniformly document cases, creating clear files in the system of record

Table 16: Task 5 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Rick Skigen Senior Manager</p>	<p>Rick Skigen is a seasoned AI leader specializing in case review and management, currently leading the Elevate Florida program’s case management process to drive operational excellence and consistency. He has developed and implemented standardized review protocols, authored policy papers, and created strategic communications for over 500 clients, streamlining operations and enhancing decision-making workflows. Rick’s experience includes delivering technology solutions to major government agencies, providing audit readiness and compliance, and as a Six Sigma Green Belt, he excels in process improvement, crafting training materials and documentation tools for consistent application of review procedures.</p>
 <p>Zein Jivani Manager</p>	<p>Zein Jivani, JD, AEM, is an Advisory Manager in Deloitte’s Crisis & Grants Management practice, with a decade of experience in grants management, compliance, and legal advisory for disaster recovery programs. Zein’s case review expertise is grounded in his work supporting governmental and non-profit entities through complex federal grant programs, including FEMA Public Assistance, ARPA, CARES Act, and HUD CDBG-DR. Notably, during his engagement with the City of Moore, Oklahoma, Zein conducted comprehensive audits of HUD CDBG-DR projects, facilitating contractor procurement complied with 2 CFR and 24 CFR regulations, verifying adherence to the City’s action plan, and reviewing contracts for required federal clauses.</p>
 <p>Tasnuva Rahman Senior Consultant</p>	<p>Tasnuva is a Senior Consultant in the Customer Strategy & Design offering. She has experience in Customer Experience (CX) strategy, human-centered design thinking, research, employee experience, strategy, and project management. She has developed and optimized case management strategies and workflows for disaster recovery, benefit administration, and service modernization, leveraging human-centered design and data-driven insights to improve client outcomes and operational efficiency. She managed complex vendor relationships, onboarding, and quality assurance for large-scale contract center operations, supporting high standards for customer service and program delivery in time-sensitive environments.</p>

4.3.6 Task 6: Action Plan Development and Amendments

Effective Action Plan development and amendment are essential to the success of Community Development Block Grant–Disaster Recovery (CDBG-DR) programs, supporting transparent, equitable, and compliant allocation of federal recovery funds in alignment with HUD requirements. Deloitte is uniquely positioned to support DCR in navigating the complexities of this process, leveraging deep regulatory expertise, proven project management capabilities, and a commitment to stakeholder engagement.

Our approach is designed to address the unique challenges inherent in Action Plan management. Repeated federal allocations often necessitate serial amendments, requiring agile processes and vigilant tracking to assist in each update remaining consistent with evolving program objectives and regulatory requirements. Deloitte’s methodology emphasizes proactive planning and structured workflows, enabling the timely preparation and submission of amendment packages while minimizing disruption to ongoing program activities.

We also recognize that public-comment calendars can lengthen obligation timelines, potentially delaying critical recovery efforts. Deloitte mitigates this risk by establishing clear schedules, maintaining thorough records of public comments, and streamlining stakeholder engagement activities. Our team provides for feedback that is systematically captured, addressed, and documented, facilitating compliance with HUD’s citizen participation requirements without compromising program momentum.

Another key challenge is reconciling conflicting data sources for unmet-needs recalculation, such as discrepancies between U.S. Census American Community Survey (ACS) data and HUD grantee-provided information. Deloitte leverages advanced data analytics and transparent methodologies to validate and integrate multiple data sources, helping Action Plans and amendments remain grounded in accurate, defensible needs assessments.

Through ongoing monitoring, communication, and collaboration with DCR and stakeholders, Deloitte supports the effectiveness, transparency, and responsiveness of Action Plans and amendments throughout the program lifecycle—aligning with DCR’s mission to deliver impactful recovery outcomes despite evolving challenges.

Table 17: Approach for Task 6: Action Plan Development and Amendments

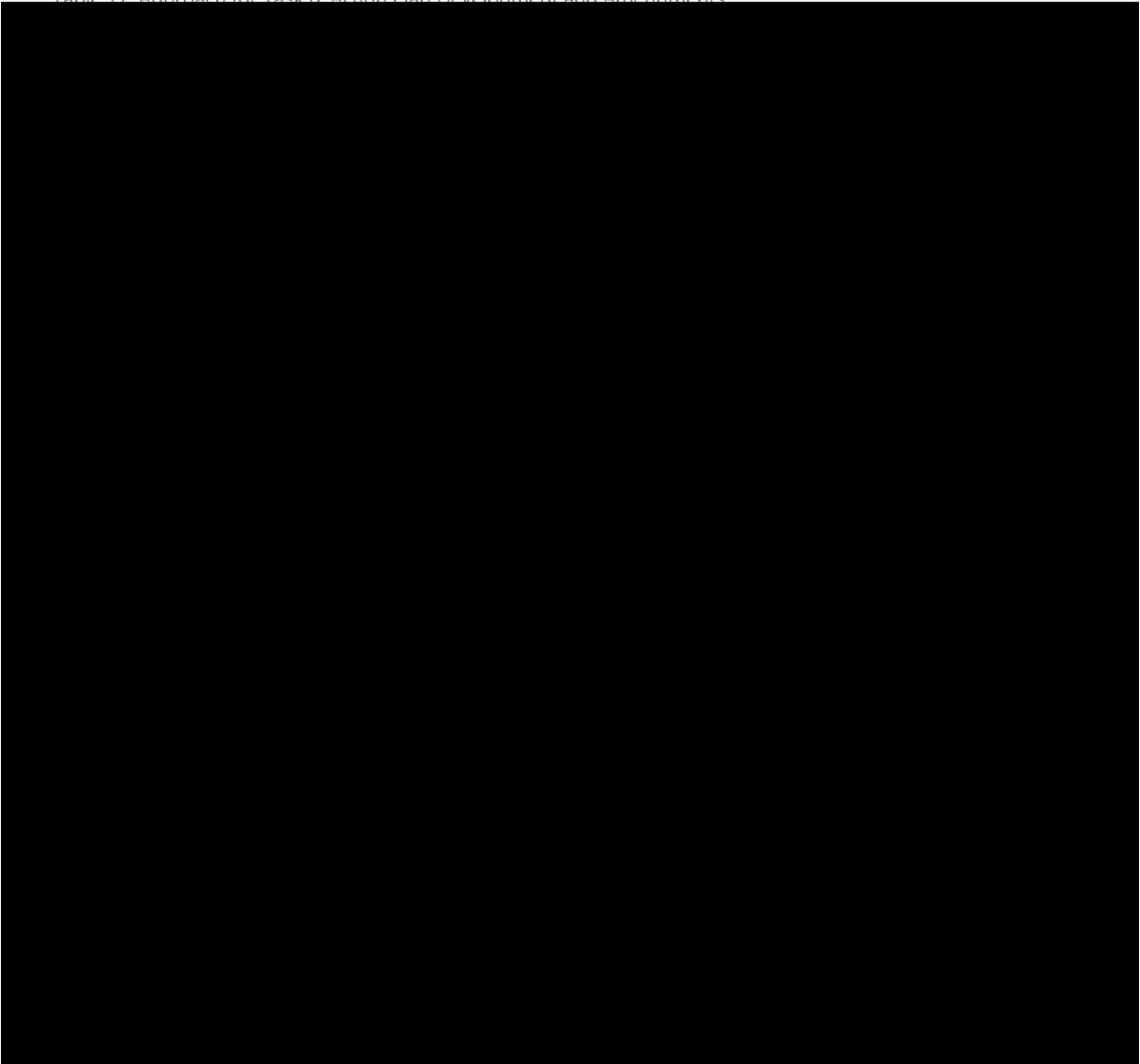


Table 18: Performance and Success Measures

Criteria	Description
Timely Delivery	Review current, approved CDBG-DR Action Plan for Hurricane Helene and provide relevant feedback identifying areas to monitor for risk or potential future updates within 2 weeks of contract execution.
Effective Technical Assistance	Monitor program feedback to identify trends to gather quantitative and qualitative data to support amendments including all required documentation.

Criteria	Description
Accuracy and Completeness	Successfully submit and receive approval for needed Action Plans and subsequent amendments without receiving feedback from HUD for required edits before approval.
Effectiveness Monitoring	Complete after-action analysis for approved Action Plans and amendments to monitor and measure the successful implementation.

Table 19: Task 6 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Shayne Davis Senior Consultant</p> 	<p>Shayne Davis specializes in Disaster Recovery with 10 years of experience working with CDBG-DR, CDBG-MIT, CARES Act, and the American Rescue Plan Act (ARPA) funding to assist governments with managing more than \$1B in federal funding. Shayne served as Program Manager with New York Governor’s Office of Storm Recovery (now Office of Resilient Homes and Communities) Single Family Housing program overseeing more than \$630M supporting more than 5,800 survivors of Super Storm Sandy. Shayne aided the North Carolina Office of Recovery & Resiliency (NCORR) in awarding over \$260M to more than 2,700 storm survivors, with 85% of recipients being Low to Moderate income; led a team of over one hundred members to process applications through eligibility, inspections, awards, and Uniform Relocation Assistance. Additionally, he provided strategic support with reporting, tracking, and buildout of the system of record.</p>
 <p>Brendan Saunders Consultant</p> 	<p>Brendan Saunders is a seasoned policy leader and Fair Housing specialist with over 20 years of experience in strategic planning, program execution, and community engagement to advance equitable outcomes. Brendan has extensive expertise managing federal grants, including CDBG–CARES Act (CV), HOME Investment Partnerships Program (HOME) American Rescue Plan (ARP), Emergency Solutions Grant (ESG–CV), and the Fair Housing Initiatives Program (FHIP). He co-led the development and implementation of a \$12.5 million, five-year consolidated spending plan for the City of Racine to expand fair housing access, administered \$450,000 in COVID-19 relief funding to address pandemic-related housing gaps, and allocated CDBG resources for a \$217,000 rental assistance program. Brendan’s data-driven approach and deep understanding of policy and urban planning have enabled him to create efficient, responsive systems and frameworks for housing stability, working closely with homeless prevention providers and stakeholders to support individual and community success.</p>
 <p>Amber Lynn Manager - McBride Consulting LLC</p> 	<p>Amber Lynn is a Specialist with over 6 years of experience managing large, federally funded disaster recovery and stimulus portfolios for state and local governments. She possesses extensive expertise in CDBG-DR, gained through her work on New York City’s Hurricane Sandy recovery, where she oversaw the reimbursement of \$4.2 billion, administered citywide CDBG-DR grant systems, and led closeout preparation. Amber also provided FEMA Public Assistance leadership for the State of Vermont, guiding project worksheet development, drawdowns, documentation, and closeout processes. Amber also supported Cook County, IL’s ARPA-SLFRF initiatives, where she managed subrecipient program oversight, delivered training, and ensured compliance and reporting to the U.S. Treasury.</p>

 = proposed key personnel

4.3.7 Task 7: Needs Assessments, Market Analysis, and Geospatial Support

DCR plays a vital role in identifying and addressing unmet needs across North Carolina’s communities following disasters such as Hurricane Helene. Success depends on accurately assessing needs, recognizing underserved populations, and strategically allocating resources for maximum impact. While North Carolina benefits from robust state-level GIS capabilities, some local governments—particularly in rural areas—may face challenges in collecting and analyzing spatial data, which can hinder comprehensive needs assessments.

Deloitte brings deep experience supporting government agencies and disaster recovery programs nationwide, including needs assessments, market analyses, and geospatial support for clients such as HUD, FEMA, and state emergency management agencies. We can offer proprietary resources, such as PeoplePrism™— an AI-powered dataset with population insights on over 335 million individuals in the U.S. and more than 1,500 data variables — which can help generate actionable models and inform targeted outreach strategies. Although PeoplePrism™ is not included in Deloitte’s pricing for this proposal, we welcome the opportunity to discuss it further should DCR require additional information. These advanced analytics, available pending discussions post award, can provide North Carolina with tailored social, economic, health, and lifestyle insights to enhance stakeholder engagement and outreach.

Our team also has proven capabilities in spatial modeling, interactive dashboard development, and public reporting. For FEMA’s Division of Risk Management, Deloitte supported the Risk Mapping Assessment and Planning (Risk MAP) Program, conducting geospatial analyses to evaluate equity impacts, measure progress toward flood hazard mapping goals, and advance LiDAR data collection. We developed program management frameworks and risk tracking tools now used across FEMA’s \$1B Risk MAP portfolio.

Building on this foundation, Deloitte can deliver a comprehensive, data-driven approach for DCR—integrating federal, state, and local data sources to clarify unmet needs across housing, infrastructure, and economic sectors. Our process includes stakeholder engagement, field validation, and market analysis to benchmark local conditions and identify targeted interventions. Where needed, we can provide technical support to help local governments fully leverage these tools. Through this integrated approach, Deloitte can equip DCR with the insights and resources needed to optimize resource allocation, enhance program effectiveness, and drive equitable recovery outcomes across North Carolina.

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[REDACTED]	[REDACTED]
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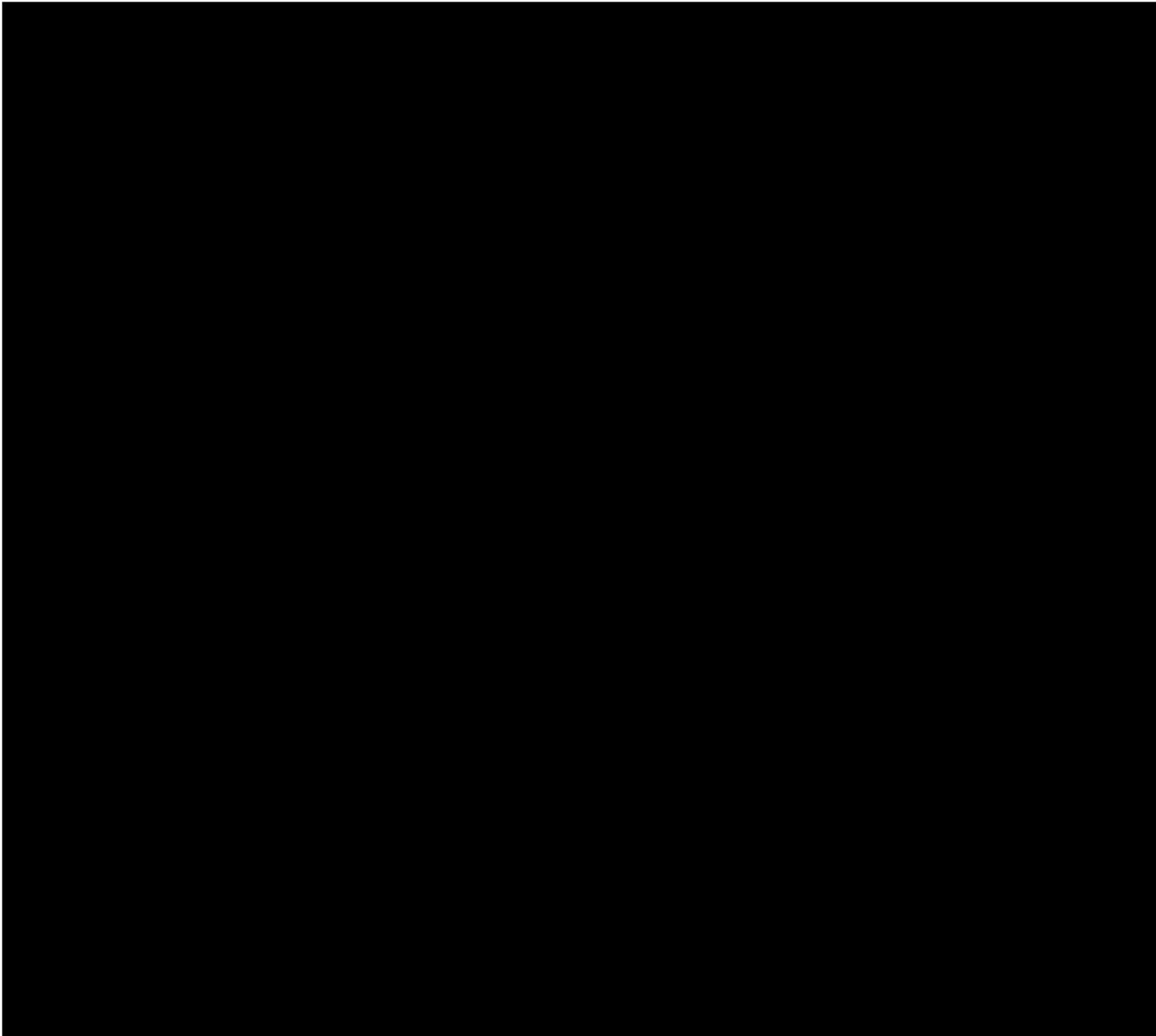


Table 21: Performance and Success Measures

Criteria	Description
Data Analysis	Systematically collect and analyze quantitative and qualitative data from federal, state, and local agencies (HUD, FEMA, SBA, NOAA, etc.) to uncover patterns, assess gaps, and forecast future demands. Use findings to inform resource allocation and program development.
Needs Assessment	Aggregate housing, economic, and infrastructure data into a unified repository. Quantify market demand and residual losses by sector, calculate Unmet Need Indices at the census tract level, and validate findings through stakeholder engagement and field sampling. Review existing programs for cost, impact, and timelines to facilitate resource deployment aligns with HUD requirements and targets vulnerable communities.

Criteria	Description
Market Analysis	Evaluate economic conditions, resource availability, and sectoral trends. Overlay labor, materials, and credit-market data onto needs assessment outputs. Perform gap analysis to identify mismatches between demand and available resources, and generate recommendations that enhance benefits while maintaining compliance with HUD eligibility and administrative requirements.
Geospatial Analysis	Integrate and harmonize data from multiple sources into standardized spatial units using advanced geospatial tools (Esri ArcGIS, PostgreSQL/PostGIS, Geopandas, etc.). Add contextual layers (social vulnerability, infrastructure, zoning) to enrich analysis. Apply spatial modeling techniques to link disaster impacts with environmental and socioeconomic factors and simulate scenarios to quantify effects of funding strategies.
Geospatial Reporting	Produce intuitive geospatial data products (maps, dashboards, visualizations) using tools such as Tableau, PowerBI, R, and Python. Tailor reports and dashboards to client preferences, delivering in formats such as HTML, PDF, or interactive dashboards to support transparent, data-driven decision-making.

Table 22: Task 7 Specialist Spotlight

Name	Experience with Similar Requirements
 Andrew Dané Manager	Andrew is a Specialist Master within the Location Intelligence practice in Deloitte Consulting. Having over ten years of Geographic Information systems (GIS) experience, Mr. Dané provides expertise in geospatial engineering related to: solutions architecture, web application development, ArcGIS, spatial analysis, network analysis, modeling, cartography, remote sensing, process automation, content management, database management, and data collection. Mr. Dané maintains experience in multiple industries including Federal, Telecommunications, Public Health, Utilities, Emergency Management, Commercial Supply Chain, and Local/State Government.
 Steve Gianfortoni Manager	Steve is a manager with a background in a wide range of data science and AI applications with experience leading teams of data scientists to develop solutions in Natural Language Processing, Generative AI, workforce planning, and recommenders. He has worked on relevant projects such as creating a recommendation engine for aligning state residents to social services based on proximity, eligibility, and potential needs, and has experience integrating geographic information into data analyses.
 Arndt Gossel Manager	Arndt Gossel is a manager specializing in cyber and strategic risk with a focus on location intelligence. With a background in environmental engineering and over nine years of experience, Arndt brings deep expertise in project management, geospatial modeling, and data analytics for both public and private sector clients. He is trained in Scrum and SAFE Agile methodologies and has led teams supporting major federal initiatives, including FEMA's Risk Mapping, Assessment, and Planning (Risk MAP) Program, where he managed business architecture redevelopment, IT modernization, and the adoption of agile project management practices. Arndt has also overseen data analytics and operational strategy for Deloitte's GPS Advisory Operations, developed reporting workflows, and managed investment budgets. Prior to Deloitte, he contributed to national-scale hydrologic and water quality modeling for the U.S. Environmental Protection Agency, earning recognition for leadership in cross-disciplinary research and regulatory support.

3.3.8 Task 8: Program Performance Monitoring and Evaluation

Deloitte's performance monitoring and evaluation framework is purpose-built to deliver transparency, accountability, and measurable impact throughout the CDBG-DR program lifecycle. Our approach is grounded in establishing clear deliverables, timelines, and milestones, facilitating robust oversight of subrecipients and contractors while advancing the success and integrity of disaster recovery initiatives. By leveraging utilization-focused evaluation methods, advanced analytics, and Deloitte's proprietary accelerators, we transform data-driven insights into actionable strategies that foster continuous improvement and compliance with HUD and state requirements.

Deloitte develops integrated dashboards and milestone-tracking solutions tailored to both housing and infrastructure programs, enhancing executive visibility across all key performance indicators. Our tools provide proactive oversight of activities such as environmental review checkpoints under 24 CFR Part 58, embedding risk indicators to anticipate compliance issues and monitor dependencies. This structured schedule management equips DCR leadership with timely insights, supporting effective decision-making and sustained compliance across the CDBG-DR portfolio.

Recognizing the need to streamline reporting from multiple systems—including Salesforce, Excel trackers, and NC FAST—Deloitte's approach consolidates data through standardized templates and automated workflows. Our reporting framework promotes consistency and data integrity, combining narrative summaries with visually rich dashboards to present both high-level insights and detailed performance data. Robust validation protocols confirm data accuracy, while coordination with HUD's Disaster Recovery Grants Reporting (DRGR) system facilitates alignment with federal requirements and efficient submissions.

Deloitte's integrated performance tracking systems and risk-based assessment frameworks provide a comprehensive view of program progress, leveraging workflow controls and predictive analytics to highlight trends and prioritize technical assistance. Continuous improvement is embedded in our approach, with lessons learned from each reporting cycle enhancing effectiveness and reducing administrative burden. Targeted training and knowledge transfer build sustainable grants management capabilities for state and subrecipient teams.

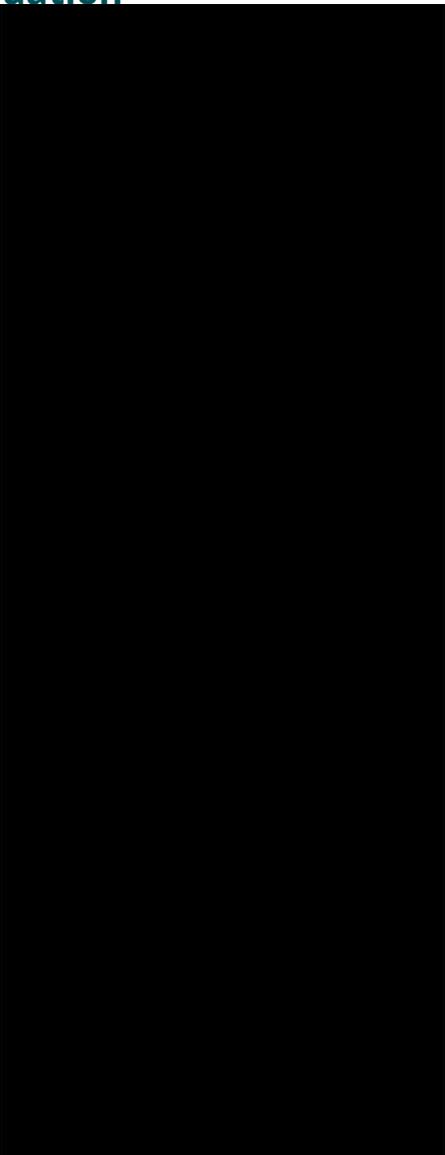


Figure 6 –Inputs and Outputs for Deloitte's Performance Monitoring and Evaluation Framework

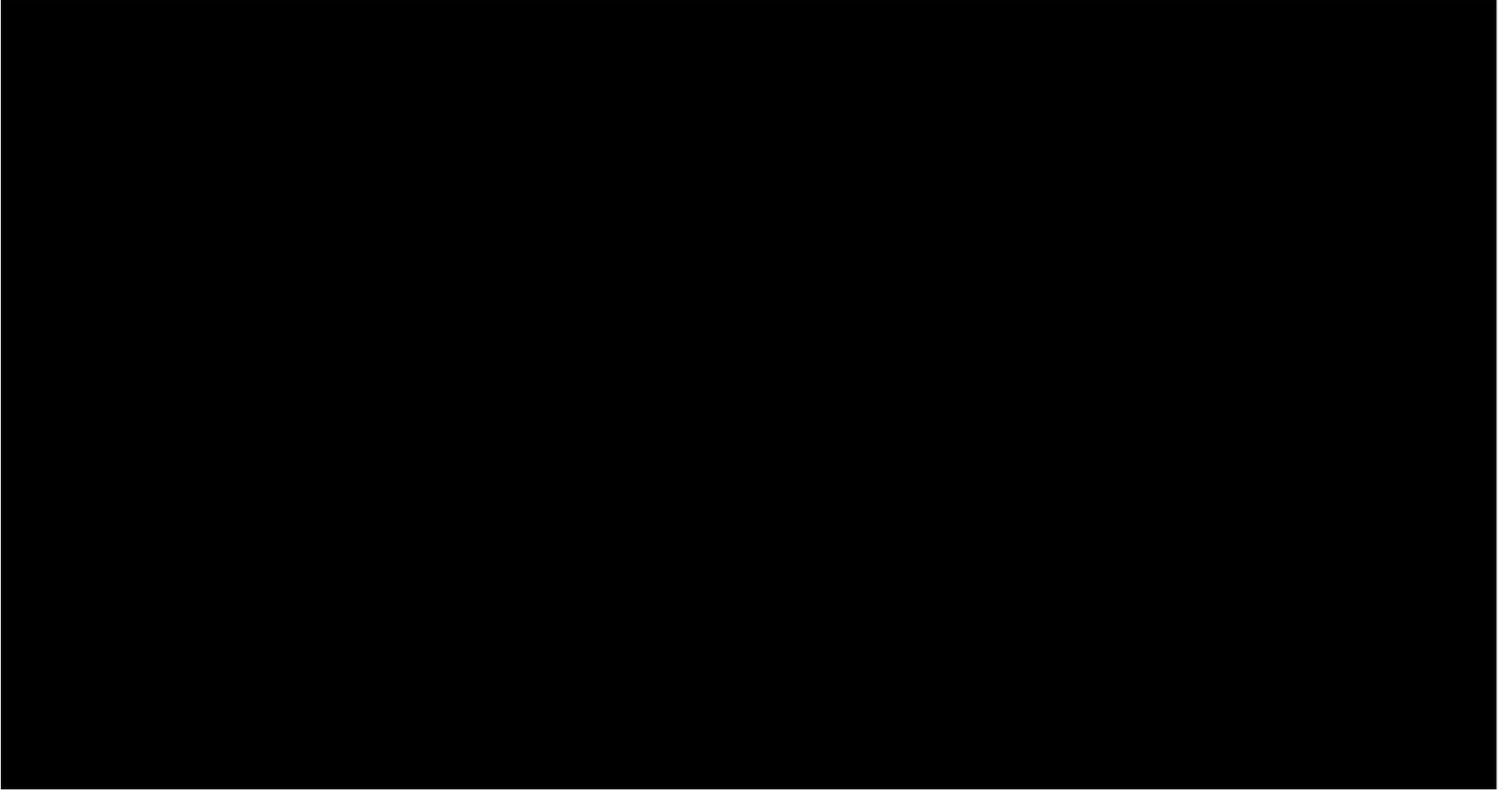
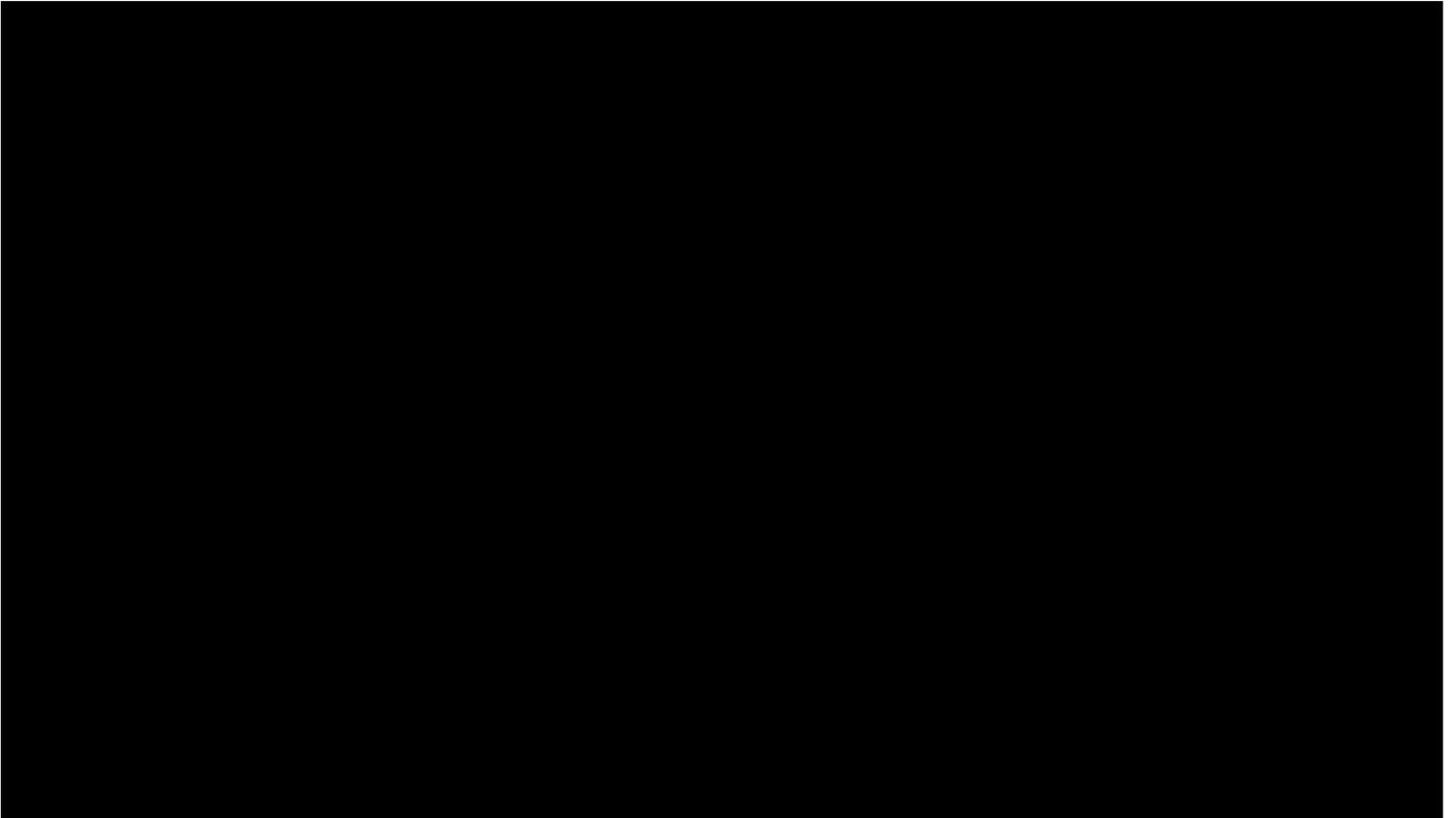


Figure 7 - Subrecipient Monitoring Dashboard

By bridging data silos and expanding visibility, Deloitte positions DCR's CDBG-DR projects for successful HUD monitoring, audit readiness, and sustained program performance.

Table 23 - Approach to Task 8: Program Performance Monitoring and Evaluation



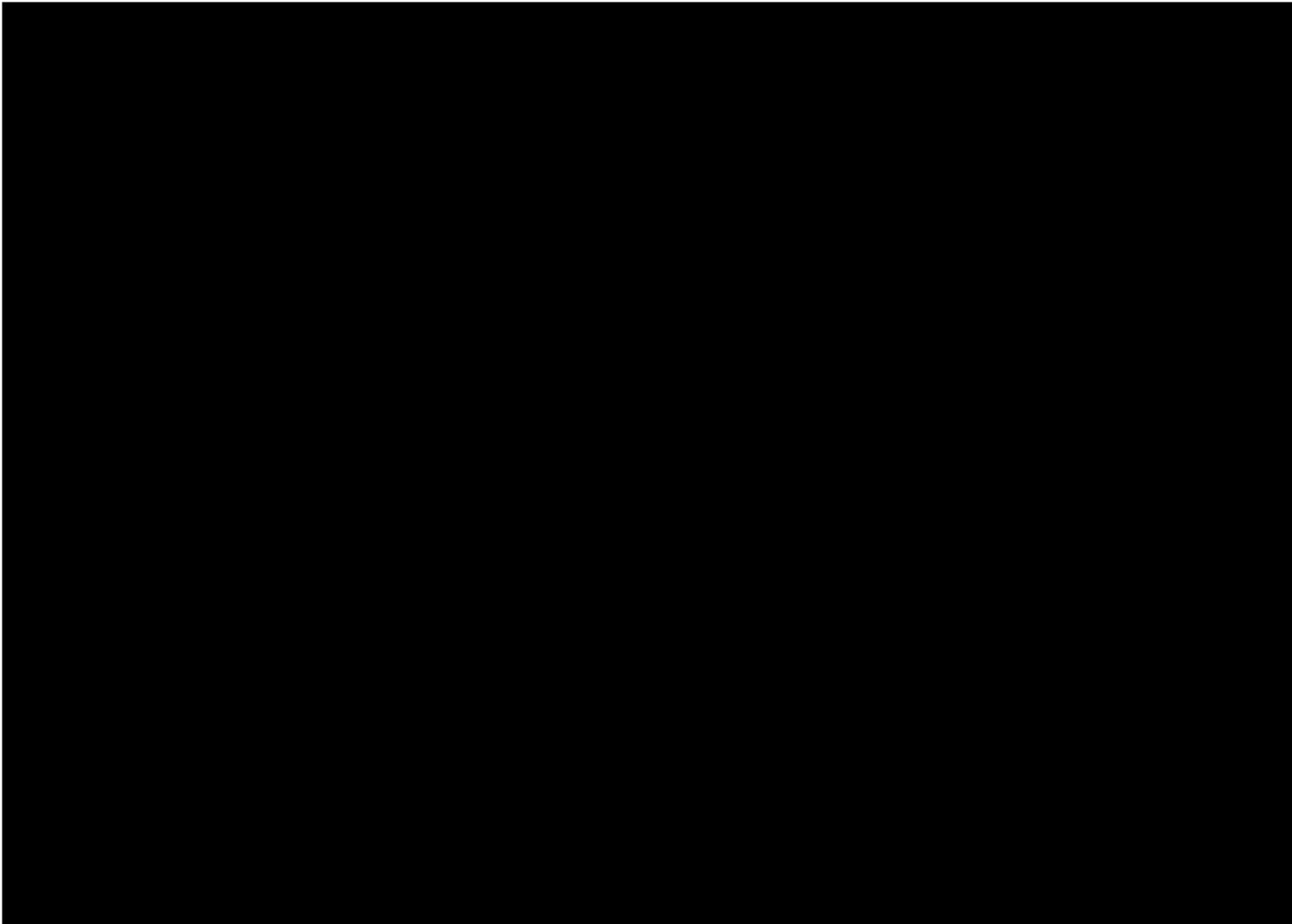


Table 2525: Task 8 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Joe Gorsuch Manager</p> 	<p>Joe Gorsuch is well-versed in federal grants management and has comprehensive knowledge of the entire grant life cycle. He has overseen subrecipient monitoring and federal reporting to federal agencies to support overall compliance and transparency. Joe has developed customized tools to increase efficiency, including agile monitoring tools, standardized communications for subrecipients, cross-collaboration information repositories, assignment trackers, and subrecipient feedback surveys. Currently Joe leads compliance monitoring and technical assistance efforts for state agencies and non-state entities.</p>
 <p>Eleanor Thompson Senior Consultant</p> 	<p>Eleanor Thompson is a sustainability and program evaluation specialist with deep experience in designing performance monitoring frameworks and compliance systems for state and local agencies. She has led governance and program management for initiatives such as NYSERDA's IEDR Program and North Carolina's DOE Home Efficiency Rebates, developing tools for milestone tracking, compliance, and stakeholder reporting. Eleanor also contributed to grid modernization efforts for Southern California Edison and helped strengthen federal evaluation practices at the U.S. Government Accountability Office through guidance and framework development.</p>

Name	Experience with Similar Requirements
 <p>David Wright Senior Consultant</p> 	<p>David Wright is a grants management professional with over five years of experience in program performance monitoring and evaluation. He has a proven track record in overseeing compliance and risk management across the grant lifecycle, maintaining operational efficiency and program success. David has supported large-scale government programs, such as the Elementary and Secondary School Emergency Relief (ESSER) Fund and the Emergency Rental Assistance Program (ERAP), by conducting compliance reviews, audit readiness support, and technical assistance training. His expertise has been instrumental in enhancing grant management processes and facilitating successful program outcomes. Through meticulous monitoring and evaluation, David provides valuable insights into program status and progress, enabling stakeholders to make informed decisions and achieve timely disbursements.</p>

 = proposed key personnel

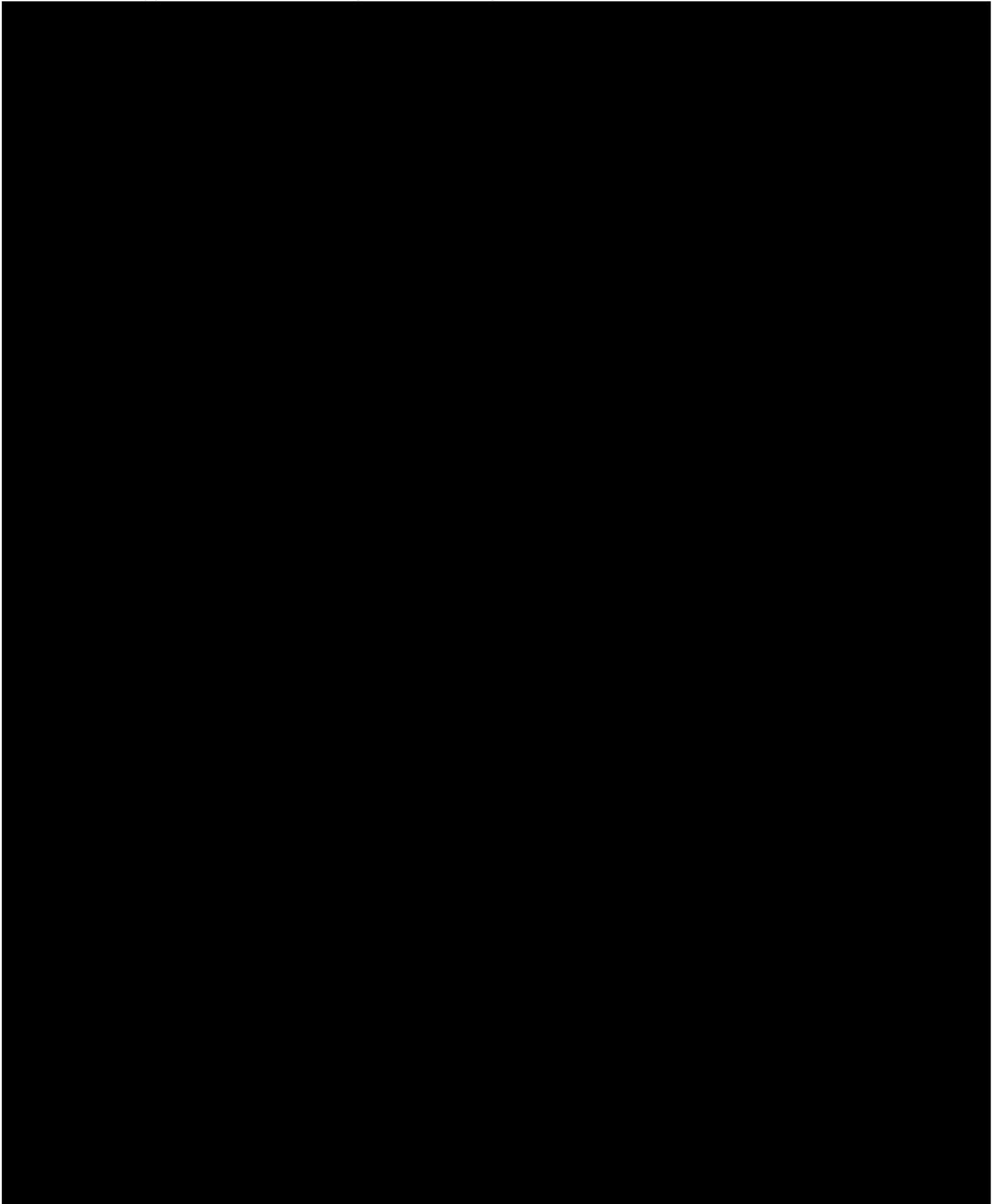
4.3.9 Task 9: Civil Rights, Fair Housing, Labor Standards, and Historic Preservation

Deloitte is prepared to provide comprehensive administrative, technical, programmatic, and project management support to support DCR’s compliance with civil rights, fair housing, labor standards, and historic preservation requirements for CDBG-DR initiatives. Leveraging our network of subject matter advisors, Deloitte will deliver targeted technical assistance, ongoing monitoring, and documentation in close collaboration with DCR.

Our approach is designed to help DCR achieve and sustain compliance with all applicable federal and state requirements by embedding leading practices, utilizing advanced analytics, and deploying robust reporting dashboards. For example, to help address the limited pool of Section 3-qualified contractors in certain regions, Deloitte will offer outreach and capacity-building support, including training, and develop tracking tools and reporting templates. We will also develop documentation for Fair Housing and Affirmatively Furthering Fair Housing, and provide labor standards monitoring tools, wage verification processes, and Davis-Bacon/Copeland Act compliance resources. In addition, Deloitte will support documentation for National Objectives compliance and historic preservation, including Section 106 consultation records and coordination with the State Historic Preservation Office (SHPO), with a focus on helping streamline reviews and minimizing project delays.

By integrating advanced analytics and continuous feedback mechanisms, Deloitte enables proactive identification of compliance risks and timely corrective actions, supporting transparent, equitable, and effective program delivery across all recovery activities. Our readiness and demonstrated methodologies help equip DCR to navigate the complexities of CDBG-DR compliance and achieve its recovery objectives with confidence.

Table 2626: Approach for Task 9: Civil Rights, Fair Housing, Labor Standards, and Historic Preservation



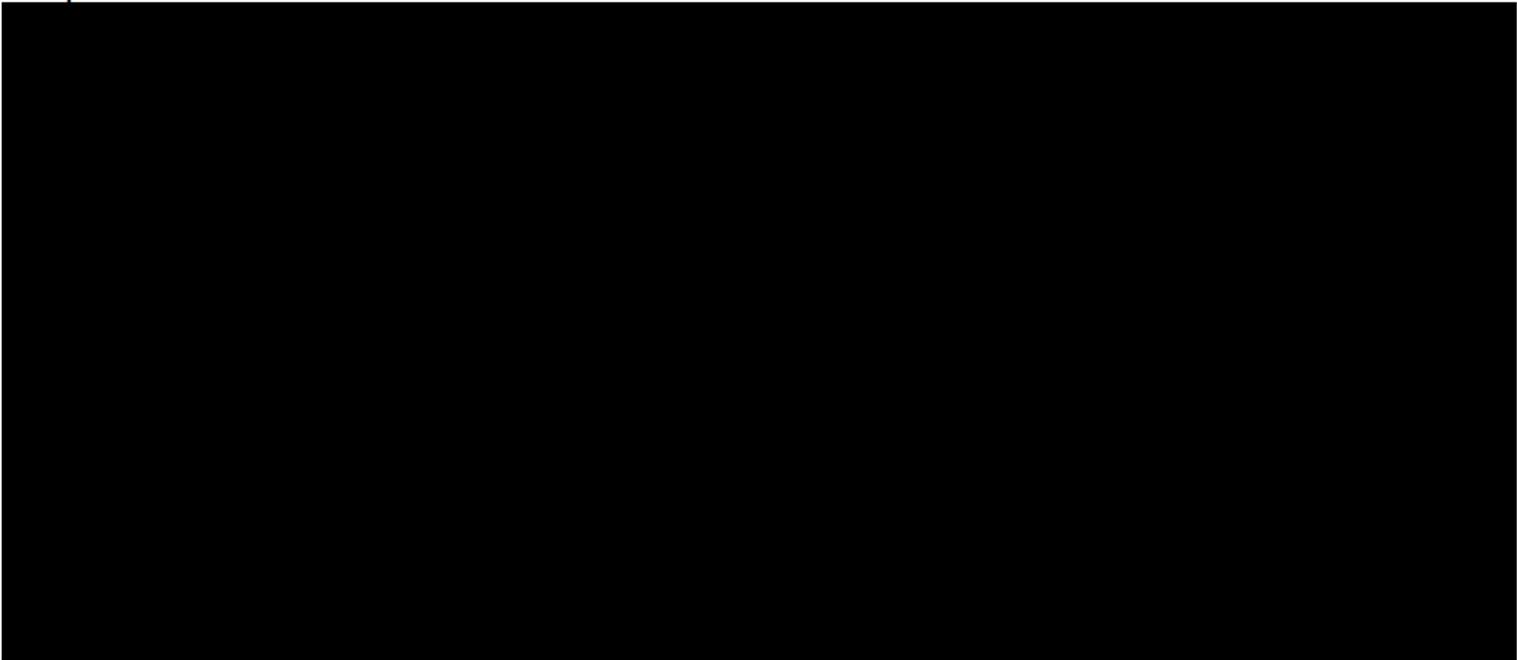


Table 2727: Performance and Success Measures

Criteria	Description
Timely Delivery	Deliver compliance tracking tools, templates, and required documentation according to the agreed project schedule and milestones.
Accuracy and Completeness	Support the preparation of documentation and reports to help maintain thoroughness, accuracy, and compliance with applicable civil rights, fair housing, labor standards, and historic preservation requirements.
Compliance Support	Support client projects in achieving and maintaining a high rate of compliance through effective monitoring and technical assistance, as evidenced by successful audits or reviews.
Effective Technical Assistance	Provide technical assistance and monitoring that enhances client and stakeholder understanding of requirements and facilitates prompt resolution of compliance issues.
Stakeholder Coordination	Coordinate effectively and timely with relevant agencies (e.g., SHPO), maintaining clear records of project reviews, consultations, and approvals.
Audit Readiness	Maintain all records and processes that support the client’s readiness for external audits or reviews, resulting in minimal findings or corrective actions.

Table 2828: Task 9 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Beth Moretzsky Manager</p>	<p>Beth is a manager with 12 years of experience in applied research, strategy, and program incubation and development. She led strategy, technical assistance, and report development for broadband policy issues including workforce, permitting, environmental policy, and historic preservation. Beth also led the development of The White House COVID-19 Health Equity Task Force final report to President Biden. Prior to joining Deloitte, Beth led strategy and program development work for large nonprofit organizations, focused in the areas of health equity, workforce development for academic medicine, and health quality improvement.</p>

4.3.10 Task 10: Audit Readiness and Monitoring Support

Robust audit and monitoring readiness is a cornerstone for public sector organizations entrusted with federal and state funds. For (DCR), proactive audit preparation not only safeguards compliance with regulatory requirements, but also strengthens public trust, improves program impact, and mitigates risks associated with funding and operations. Deloitte brings a proven track record of collaborating with government agencies to design and implement comprehensive audit strategies, develop tailored monitoring tools, and facilitate successful responses to oversight reviews.

We recognize that DCR faces specific challenges in achieving audit readiness and effective monitoring support. Prior audits have flagged inconsistent procurement files, with remediation tasks that remain open and require focused attention. Additionally, document retention practices across multiple internal platforms increase the risk of sample failure, potentially impacting audit outcomes and compliance standing. Our specialists understand these complexities, as well as the broader nuances of public sector compliance and grant administration. We emphasize collaboration, knowledge transfer, and continuous improvement, working closely with DCR to assess current processes, address outstanding remediation tasks, and build staff capacity for sustained success.

Our approach is informed by deep experience and innovative tools—such as RegExplorer, which can accelerate compliance analysis and provide clear regulatory references to support documentation and justification. We are prepared to deliver readiness review tools and checklists tailored to program files, systems, and documentation, helping requirements be met efficiently and effectively. Our team will support the drafting of responses to monitoring reports, audit findings, and compliance inquiries, leveraging industry leading practices and lessons learned from similar engagements. Additionally, we will develop corrective action plans and tracking tools to facilitate ongoing compliance and continuous improvement. For example, Deloitte was engaged by the City of San Marcos, Texas to provide comprehensive, ongoing monitoring services for its \$33.7 million HUD CDBG-DR grant program, awarded in response to the 2015 flooding events. Leveraging deep experience in federal grant compliance and disaster recovery, Deloitte conducted regular, in-depth reviews of procurement, contracts, finance, and housing activities to provide strict adherence to federal regulations, the City’s HUD Action Plan, and local policies. By delivering clear, actionable recommendations and supporting staff development, Deloitte not only strengthened the City’s internal controls and program administration, but also helped San Marcos achieve a HUD “low risk” classification.



Figure 8: Audit Readiness and Monitoring Approach



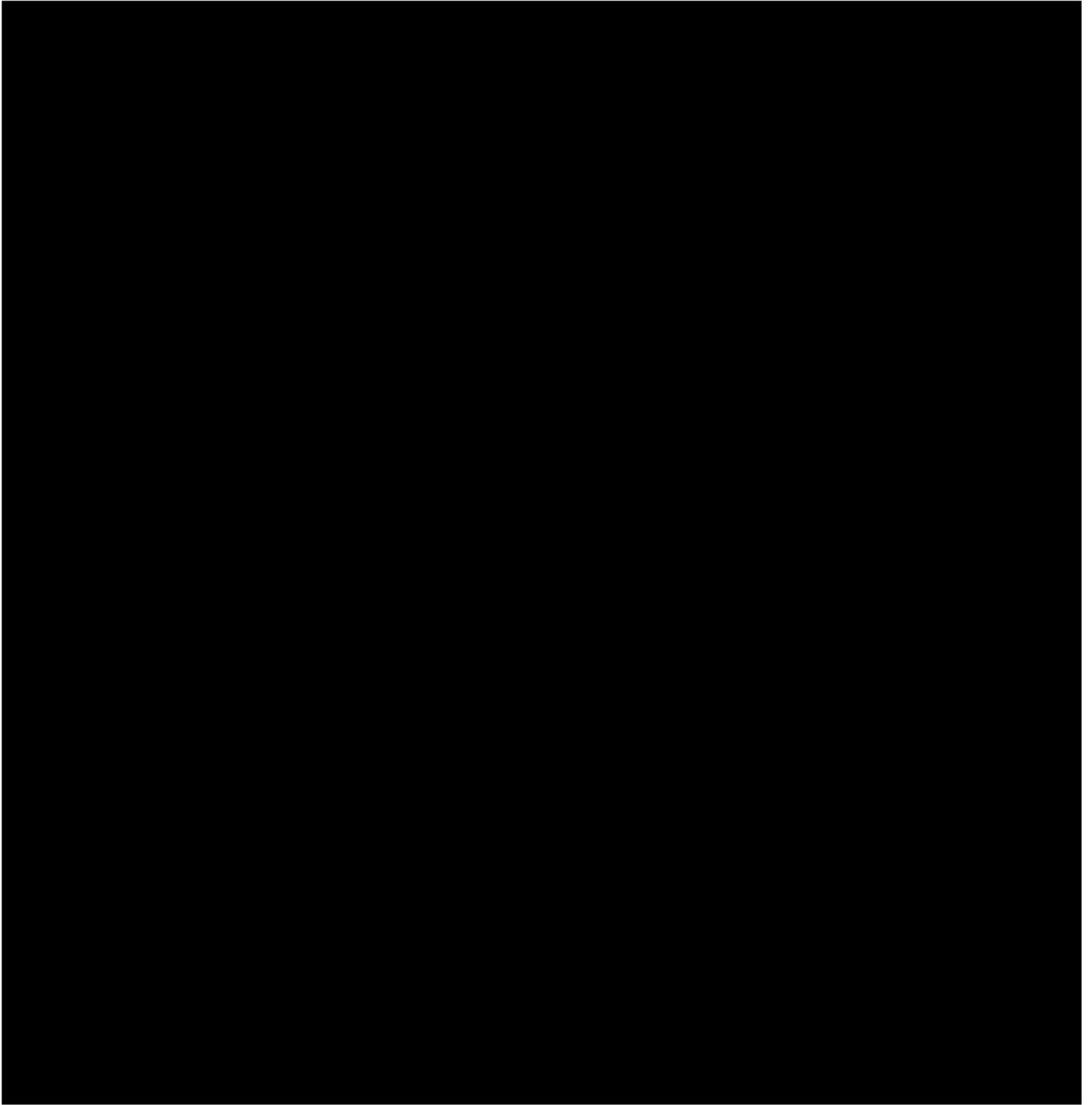


Table 3030: Performance and Success Measures

Criteria	Description
Compliance	All required audit preparation, documentation, and controls will be established and verified prior to external audits, as demonstrated by successful internal reviews confirming compliance.

Criteria	Description
Timeliness	Audit readiness checklists, risk assessments, and internal audit and monitoring reports will be completed and delivered according to agreed-upon deadlines, with any anticipated delays proactively communicated to stakeholders in advance.
Remediation Effectiveness	All audit findings will be systematically tracked and monitored through resolution, supported by corrective action plans that identify root causes, outline detailed remediation steps, assign responsible stakeholders, and document timely closure.

Table 3131: Task 10 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Brooke Rouse Senior Manager</p>	Brooke is a Senior Manager with over 10 years of professional experience in audit, audit readiness and remediation, accounting, internal controls, business process improvement operations, and digital finance transformation. Over the course of Brooke’s professional experience, she has effectively worked with clients and colleagues to address auditor comments and mitigate audit findings through the development, implementation, and tracking of corrective action plans (CAPs). Brooke also leads digital finance transformation across the Finance Transformation operating portfolio by focusing on growth platforms, assets, and accelerators that resolve accounting and finance challenges.
 <p>Dipti Shah Senior Manager</p>	Dipti Shah is a Senior Manager with twelve years of experience assisting finance organizations with challenges in the reporting process optimization, risk mitigation, and accounting standards and systems implementations. Currently, Dipti is leading efforts for CFO Services Hypergrowth initiative to accelerate Deloitte’s presence at state, local, and higher education clients to help them solve complex finance, accounting, technology, and control challenges.
 <p>Belqis Rahim Analyst</p> 	Belqis is a Solution Analyst with experience in audit readiness and monitoring support for state agencies. She supports projects focused on maintaining grant compliance, monitoring fund utilization, and preparing detailed reports to facilitate oversight and address audit requirements. Belqis’s professional experience includes analyzing complex data sets to identify areas for improvement, tracking project progress, and managing financial reconciliation to maintain accuracy and transparency.

 = proposed key personnel

4.3.11 Task 11: Technical and Engineering Support for Infrastructure and Housing Projects

Delivering resilient infrastructure and housing projects in today's environment requires more than technical proficiency—it demands a comprehensive, multidisciplinary approach that combines engineering excellence, rigorous compliance, and operational agility. The DCR stands to benefit from Deloitte's extensive experience and deep bench of professionals, including engineers, cost estimators, compliance specialists, and project managers. Our team, which includes over 220 former construction managers and engineers, is uniquely equipped to support state agencies throughout the entire lifecycle of publicly funded projects, from initial concept through to successful completion.

Deloitte's recent engagement with FDEM Elevate Florida program highlights our capability to deliver on complex, high-impact initiatives. In this program, we provided comprehensive project development, regulatory review, and stakeholder engagement, enabling agencies to achieve their objectives while maintaining strict compliance with federal, state, and local requirements. Our understanding of the unique challenges facing infrastructure and housing programs, including the absence of as-built drawings among many small utilities and the tension between escalating construction costs and fixed funding allocations, allows us to tailor our support to enhance community benefit, drive economic development, and promote long-term sustainability. Deloitte addresses these challenges by deploying advanced digital tools to reconstruct missing documentation and by leveraging robust cost estimation methodologies to help clients navigate budget gaps and optimize project scope.

Deloitte will leverage its proven methodologies and advanced digital solutions, including rapidly deployable tools, to deliver timely, high-quality work products across all anticipated deliverables. Whether reviewing engineering plans, developing cost estimates, conducting feasibility studies, or performing compliance

assessments and construction inspections, our team is committed to transparency, accountability, and operational excellence. We recognize that each project is an opportunity to strengthen communities and enhance resilience, and we approach every engagement with a focus on successful outcomes and continuous improvement.

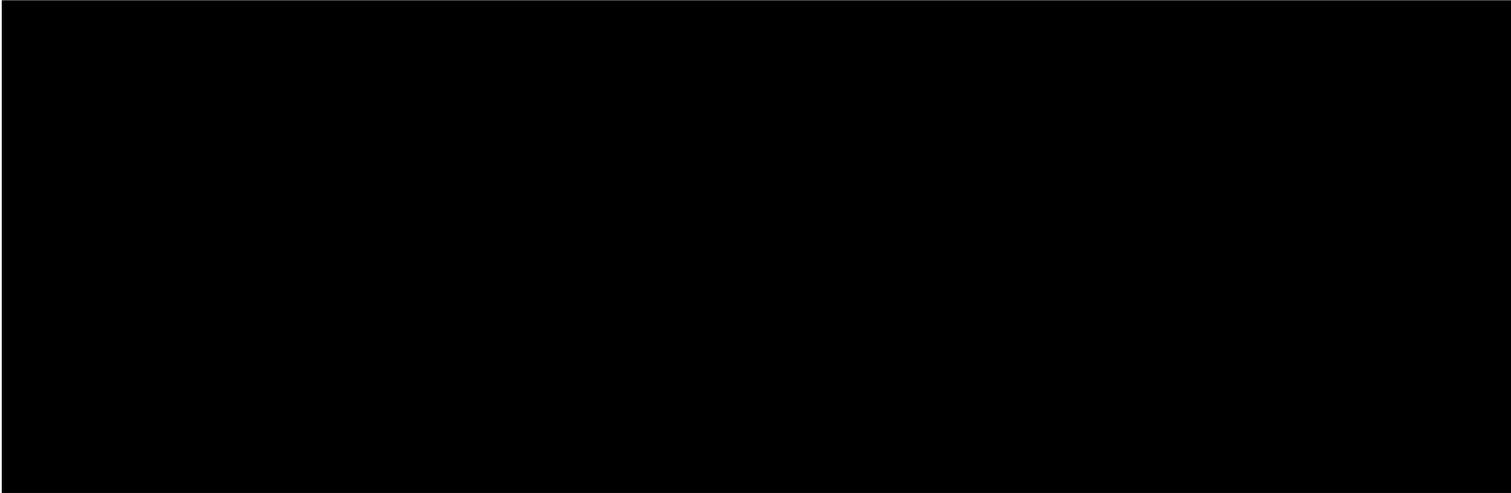
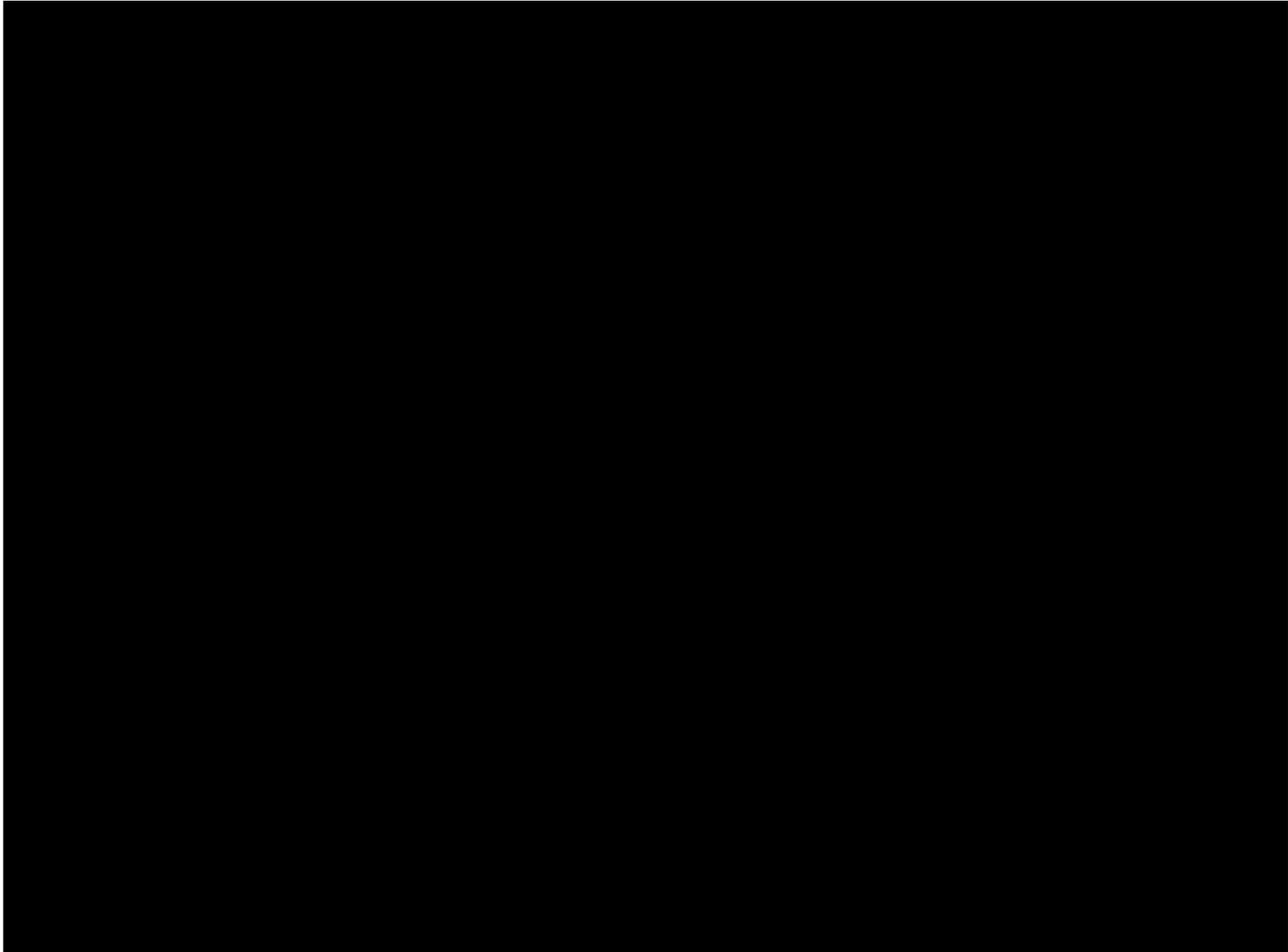


Table 3232: Approach for Task 11: Technical and Engineering Support for Infrastructure and Housing Projects



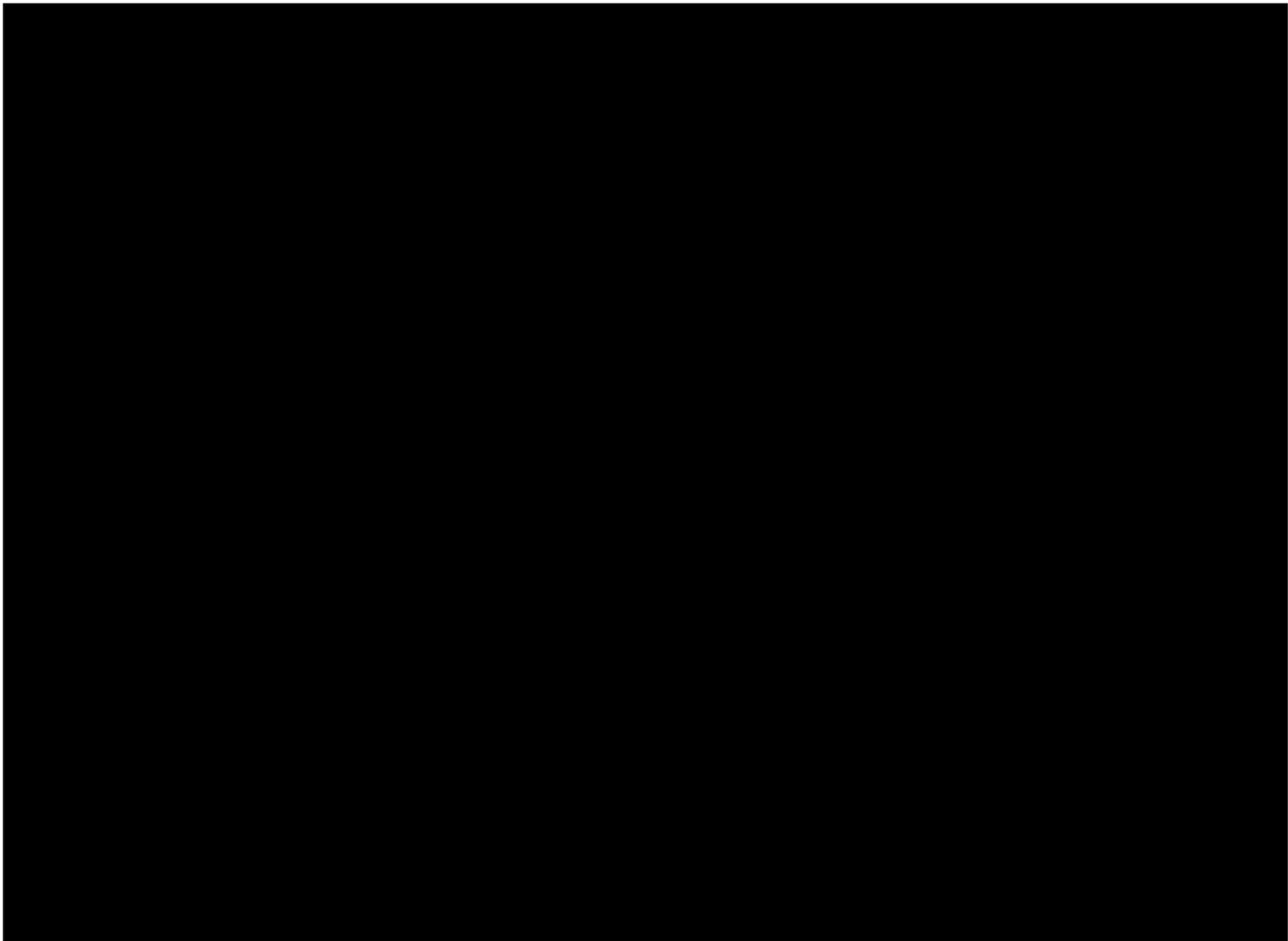


Table 33: Performance and Success Measures

Criteria	Description
Review Efficiency	Performance in the review of technical documents will be measured by the timely delivery of compliant, actionable feedback by our team. Success will be the continuous reduction of time between submittal and the delivery of feedback by leveraging lessons learned and improved technical solutions.
Plan Accuracy	Our team will monitor the accuracy of our reviews through the number of issues found, and the reduction in the occurrences of multiple review cycles or requests for Information (RFIs) from HUD or the governing review body.
Audit-Ready Findings	Measured by consistent citation of governing provisions for each flagged issue, providing defensible outputs for oversight and reporting.
Comprehensive Validation	Measured by the system’s ability to evaluate submissions across multiple domains (environmental, accessibility, historic preservation, zoning) in a single report.
Risk Reduction	Measured by the early identification of compliance issues during submission review, minimizing downstream delays and costly redesigns.
Transparency & Accountability	Measured by the delivery of unified compliance reports with traceable findings, supporting DCR’s monitoring and federal reporting obligations.

Table 34: Task 11 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Christine Daoud Senior Manager</p>	<p>Christine is a PMP and CGFM with over 15 years of consulting experience in disaster recovery and grants management. She leads Elevate Florida's Operations workstream, managing processes for inspectors and contractors to elevate over 1,000 homes. Christine also oversees construction management for LCG's ARPA program and led a HUD Multifamily Assessment Contractor team supporting GRRP grant and loan recipients.</p>
 <p>Justin Matthews Senior Consultant</p>	<p>Justin is a PMP with 10+ years of project management experience in disaster recovery and construction. He is Deputy Lead for Elevate Florida's Operations workstream, supporting the elevation of 1,000+ homes, and leads portfolio management at Facility Management Division of ICE, driving policy and process improvements for facility maintenance and inventory planning.</p>

4.3.12 Task 12: Training, Technical Assistance, and Capacity Building

Deloitte understands that successful program delivery depends not only on clear policies and procedures, but also on empowering teams to apply these tools confidently in real-world scenarios. With extensive experience supporting public sector organizations through complex grant-funded and disaster recovery initiatives, Deloitte excels at designing and delivering training, technical assistance, and capacity-building programs tailored to diverse audiences—from frontline staff to executive leadership.

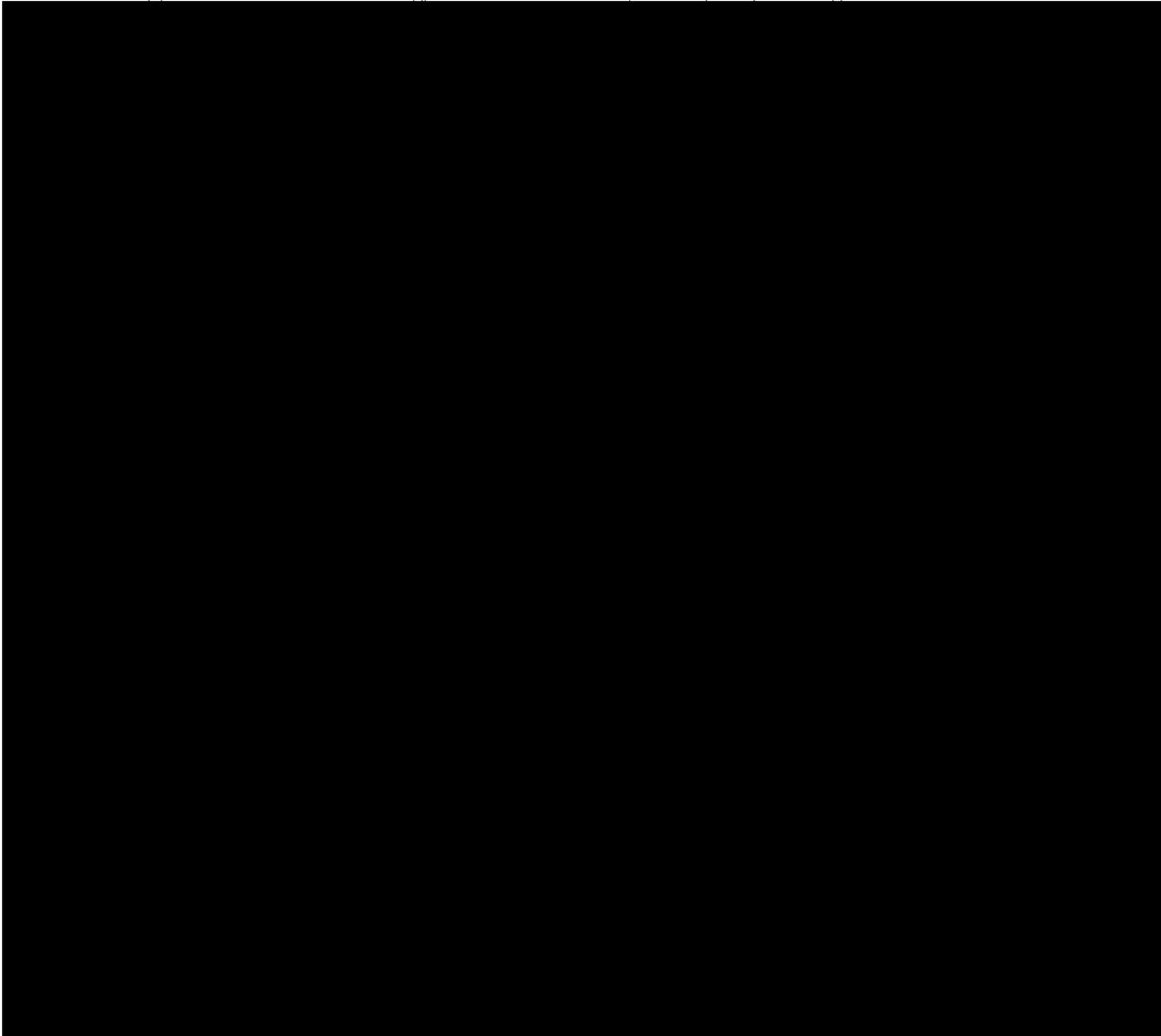
Our approach is informed by lessons learned from guiding agencies through regulatory changes, system implementations, and program launches. We provide technical assistance that spans hands-on support during critical phases to ongoing advisory services, always focused on building self-sufficiency and resilience within client teams. We recognize that staff turnover requires continuous onboarding cycles, and our training solutions are designed to be easily repeatable and accessible for new team members, maintaining consistent program knowledge and compliance.

We will develop targeted training programs for staff and stakeholders involved in program implementation, beginning with a thorough needs assessment to identify skill gaps, learning preferences, and operational challenges. Our curriculum will address foundational knowledge and advanced competencies in areas such as program policies, regulatory compliance, procurement, and reporting. Training will feature practical scenarios, case studies, and interactive exercises, with specialized modules for leadership, finance, and technical staff. Delivery will leverage in-person workshops, virtual sessions, and on-demand e-learning modules to accommodate diverse schedules, improve engagement, and address travel budget constraints. Our multi-

modal approach enables local governments and partners to access hands-on technical assistance and training regardless of location, with digital resources and virtual support supplementing in-person engagements.

We will provide ongoing, adaptive technical assistance to support program implementation across Western North Carolina, reflecting a deep understanding of the region’s recovery priorities. Our support includes real-time guidance on policy interpretation, troubleshooting, and advisory input during key phases such as program launch and regulatory updates. We will develop resources and tools—process maps, checklists, workflow templates, decision guides, and digital dashboards—to enhance capacity, promote transparency, and facilitate reporting. Regular office hours, peer-to-peer learning sessions, and targeted coaching will facilitate knowledge transfer and empowerment. By maintaining open communication and strong collaboration, Deloitte delivers solutions that are effective, sustainable, and responsive to North Carolina’s unique recovery needs.

Table 35: Approach for Task 12: Training, Technical Assistance, and Capacity Building



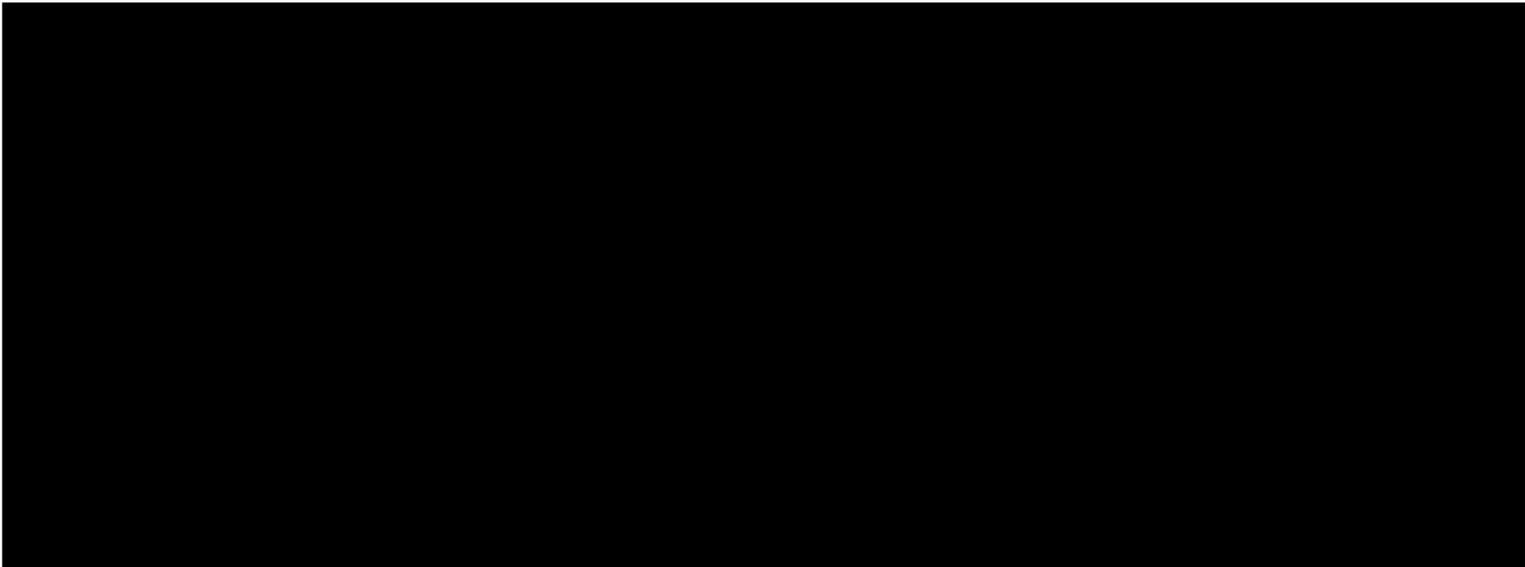


Table 36: Performance and Success Measures

Criteria	Description
Training Effectiveness	Staff demonstrate increased knowledge and confidence in applying program policies, as evidenced by improved assessment scores and positive feedback. This leads to fewer errors and better compliance in daily operations.
Capacity Building	Teams effectively use provided resources and tools to manage program responsibilities with minimal external support. Their ability to solve problems independently reflects sustainable capacity building.
Responsiveness and TA Quality	Technical assistance is delivered promptly and addresses staff needs with clear, actionable guidance. This helps resolve operational challenges quickly and keeps program objectives remain on track.

Table 37: Task 12 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Patrick Samra Manager</p>	<p>Patrick Samra is a Risk Management professional with extensive experience designing and delivering training, technical assistance, and capacity building initiatives for FEMA Public Assistance programs. He has led the development of onboarding materials and standard operating procedures, facilitated training sessions for project teams and grant recipients, and provided ongoing technical support to state, local, and tribal governments. Patrick specializes in guiding stakeholders through complex compliance requirements under 2 CFR and the FEMA Public Assistance Program and Policy Guide (PAPPG), providing effective knowledge transfer and operational readiness. His hands-on approach has helped teams and subrecipients improve federal reimbursement, strengthen program compliance, and build lasting capacity for grants management and closeout activities.</p>

Name	Experience with Similar Requirements
 <p>Adam Feeley Consultant</p> 	<p>Adam specializes in federal grants management, with a strong track record of providing technical assistance to state and local agencies. He is skilled at developing clear, effective standard operating procedures and delivering training to help teams navigate complex compliance requirements and transitions. Adam helps agencies translate guidance into practical steps, strengthening their ability to manage grants and resolve compliance issues.</p>
 <p>Raymonde Garcia Staff - AG Witt</p> 	<p>Raymonde brings four years of hands-on experience supporting federally and state-funded infrastructure and housing programs. Her expertise includes technical assistance, documentation review, and compliance assessments for grant-funded projects. Raymonde has successfully evaluated engineering and housing project documentation for completeness, accuracy, and regulatory adherence, supporting eligibility and compliance for diverse applicants. She excels in outreach and case management, tailoring her approach to underserved populations and maximizing funding opportunities.</p>

 = proposed key personnel

4.3.13 Task 13: Relocation Program (URA/TRA) Development and Compliance Support

Communities facing relocation, including those impacted by complex coastal buyouts, often encounter significant challenges, from navigating lengthy Uniform Relocation Act (URA) requirements to addressing limited beneficiary counseling capacity and housing supply shortages. Deloitte understands these realities and brings proven experience in strategic program design, regulatory compliance, and operational excellence to help agencies overcome them. For Task 13, we offer a comprehensive approach to developing, implementing, and overseeing relocation programs that not only meet URA and Optional Relocation Assistance requirements, but also address the nuanced needs of beneficiaries and program partners. Deloitte's tailored solutions and Relocation Assurance Framework help manage each aspect of federal relocation initiatives with precision, empathy, and a commitment to compliance and positive outcomes.

Central to our approach is Deloitte's Relocation Assurance Framework, which provides a structured methodology for managing relocation programs from policy development through compliance monitoring and beneficiary support. This framework enables agencies to navigate the most challenging aspects of relocation, including complex coastal buyouts that trigger lengthy URA requirements and strain beneficiary counseling capacity. Deloitte streamlines compliance processes and enhances counseling resources, helping beneficiaries receive timely, accurate guidance throughout their relocation journey. We also address the critical challenge of replacement housing supply shortages, which can result in "no comparable replacement" dilemmas for program beneficiaries. Deloitte's Relocation Assurance Framework incorporates robust application review tools and technical guidance to support eligibility and benefit determinations, even in complex housing markets. Our solutions facilitate creative problem-solving and informed decision-making, helping agencies identify alternative housing options that meet compliance standards and beneficiary needs.

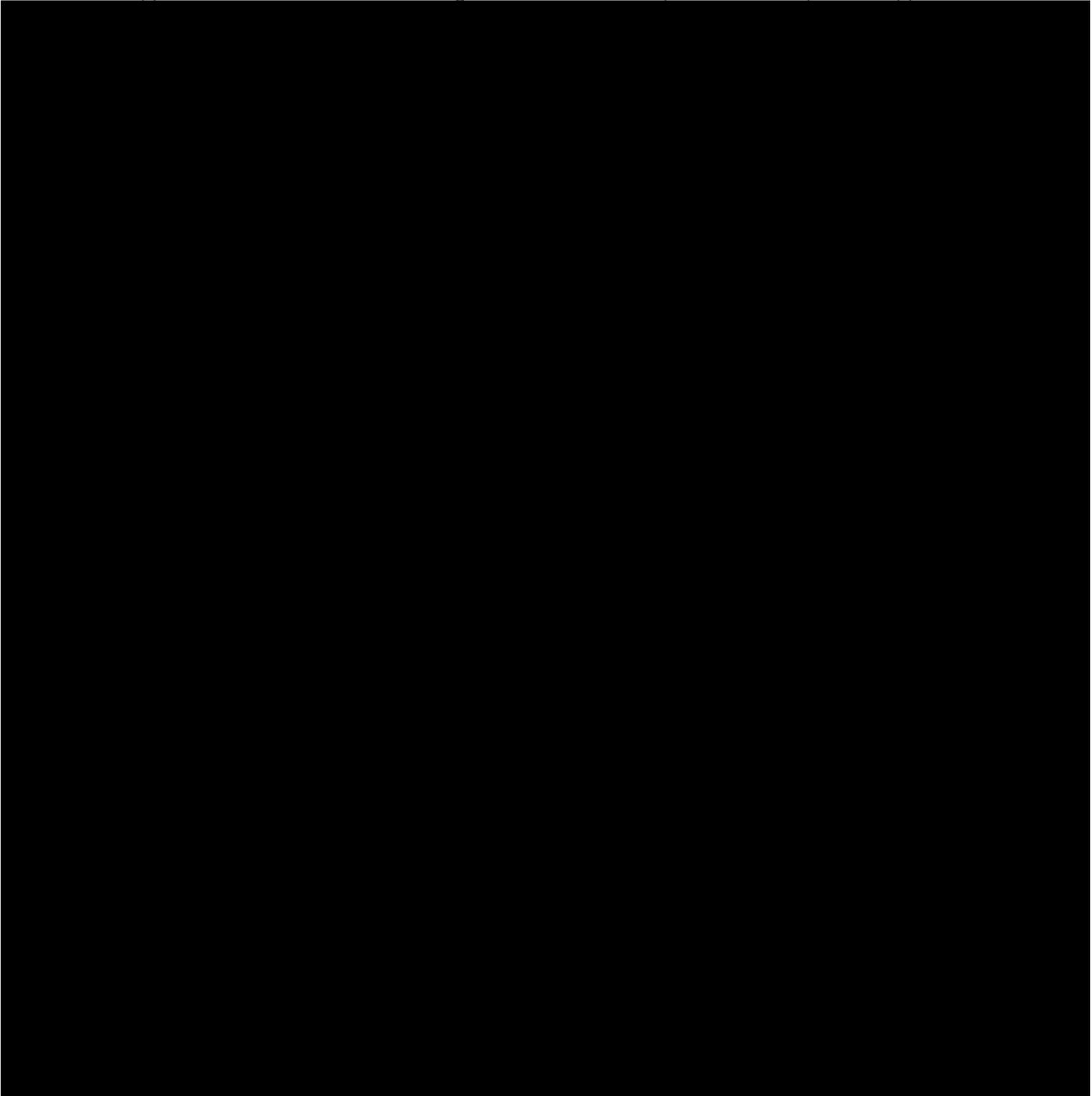
Deloitte will collaborate closely with stakeholders to design and document relocation policies, procedures, SOPs, and workflows that align with URA mandates and industry leading practices. We will provide technical guidance to inform SOR system workflows, providing integration with existing processes while strictly excluding software development activities that are out of scope. Our team will craft required relocation notices and compliance monitoring tools, enabling proactive oversight and timely corrective actions. With deep expertise in compliance frameworks, Deloitte develops resources that support ongoing adherence to federal, state, and local requirements.

Recognizing the importance of effective knowledge transfer, Deloitte will develop comprehensive training materials and deliver engaging sessions for staff and program partners. Our training solutions build capacity,

foster understanding of relocation program requirements, and promote consistent application of policies and procedures.

Throughout the engagement, Deloitte will serve as a trusted advisor and facilitator, channeling all interactions between the client and service providers to facilitate alignment with strategic priorities and successful program outcomes. Our commitment to quality, innovation, and client service will drive the successful execution of Task 13, delivering value and compliance for all stakeholders.

Table 38: Approach for Task 13: Relocation Program (URA/TRA) Development and Compliance Support



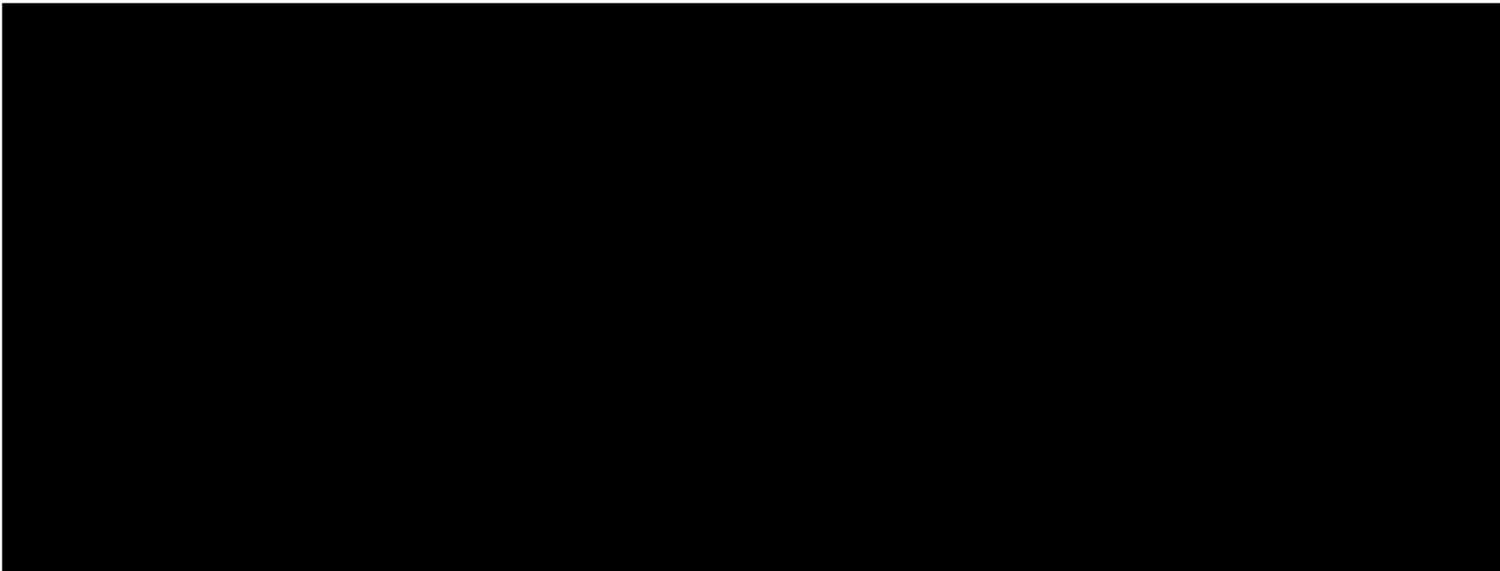


Table 39: Performance and Success Measures

Criteria	Description
Policies & SOPs	Performance and success in policy, procedures and SOP development will be measured by the timely delivery of actionable processes in compliance with HUD, federal, and state guidelines
Templates, Tools, and Workflows	Success will be measured not only by the timeliness of delivery in accordance with project deliverable timelines, but in facilitation of compliance with URA, HUD, state, and federal guidance. Performance of tools will also be evaluated on the ability to effectively determine relocation eligibility and accurately monitor spend against established benefit amounts or funding caps.

Table 40: Task 13 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Whitney Singletary Senior Manager</p>	<p>Whitney Singletary is a Senior Manager in Deloitte’s Government and Public Services practice, where she leads the Critical Infrastructure and Risk Reduction Service offering. In this role, Whitney provides strategic guidance and innovative solutions to federal, state, and local clients, helping them strengthen hazard mitigation, infrastructure resilience, and risk reduction across sectors. Whitney specializes in resilience, risk management, and strategic foresight, with a proven track record supporting agencies such as FEMA, Fannie Mae, Freddie Mac, CISA, TSA, and the White House OMB. Presently, Whitney leads the Vendor and Financial Management function for the Elevate Florida project, that includes Temporary Relocation support for over 2,500 residents. She spearheaded FEMA’s PARC initiative—the agency’s first Generative AI project, streamlining hazard mitigation planning and enhancing community engagement to build more resilient communities. Whitney consistently delivers transformative results, driving innovation, collaboration, and measurable impact for clients facing complex infrastructure and risk challenges.</p>

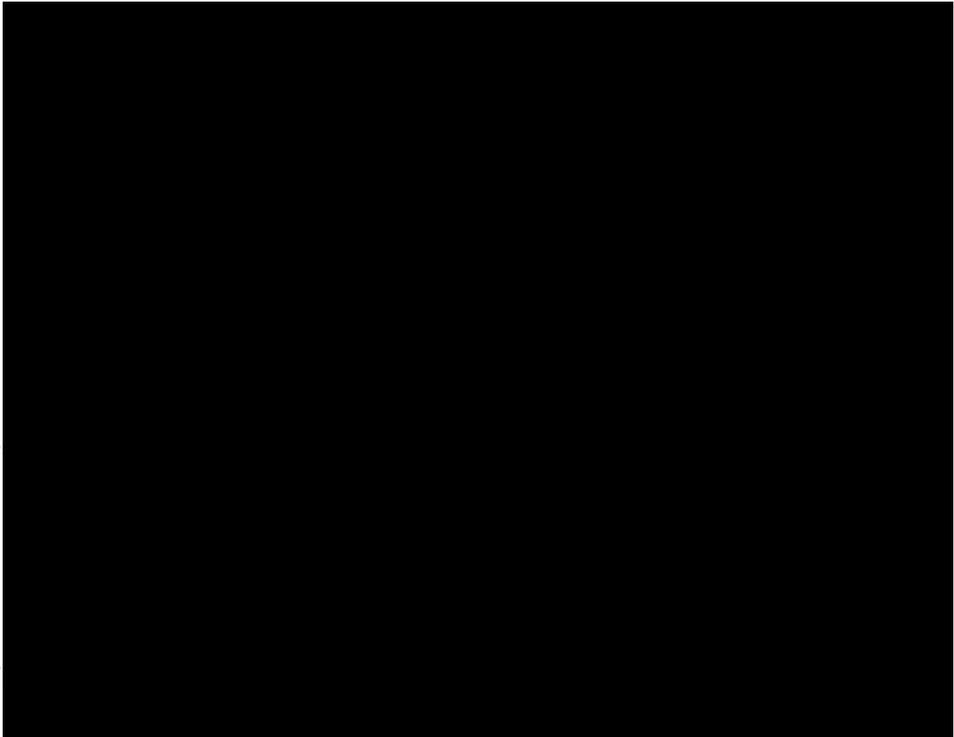
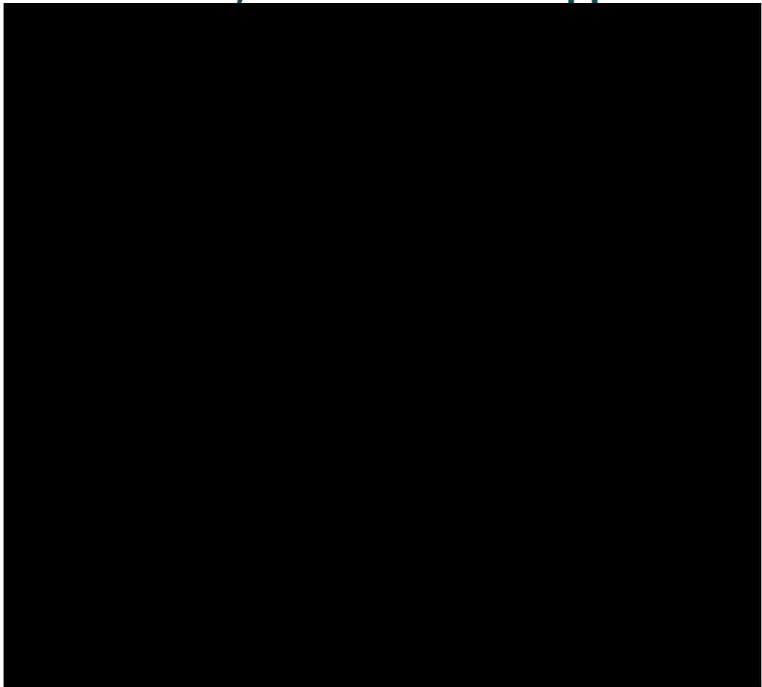
Name	Experience with Similar Requirements
 <p data-bbox="185 415 305 485">Hugh Vu Consultant</p> 	<p data-bbox="399 191 1516 474">Hugh Vu is a grants management consultant who has supported CDBG-DR funded recovery programs with a primary focus on Temporary Relocation Assistance for homeowners impacted by Hurricane Harvey and the 2019 Rio Grande Valley Floods, managing all aspects of the relocation process, including eligibility determination, financial management, and applicant/vendor coordination. He developed internal processes and tracking tools to monitor relocation cases and payments. Additionally, Hugh has supported program outreach, duplication of benefits review, contractor oversight and reimbursement, eligibility verification, and closeout activities for these programs.</p>

 = proposed key personnel

4.3.14 Task 14: Communication, Public Information, and Outreach Support

Effective public communication and outreach are essential to the successful administration of NC DCR's CDBG-DR funds. Deloitte is committed to supporting DCR's communication efforts by leveraging our deep expertise in launching and sustaining public programs that prioritize reaching vulnerable and underserved populations, in full alignment with HUD guidance. We understand that past challenges—such as the slow close-out of Hurricane Matthew recovery efforts—have impacted public trust and contributed to lower application rates. Addressing these concerns is critical to restoring confidence and encouraging participation among eligible residents. **Our approach centers on proactive stakeholder engagement—addressing concerns, facilitating smooth program rollout, driving awareness, promoting transparency, and maintaining accessibility—while upholding public trust at every stage.**

Deloitte's proven four-phase methodology—Discover, Design, Develop, and Deliver—enables clients to enhance awareness and improve adoption of public benefits and grant programs. For over 30 years, we have collaborated with states to provide communication, public information, and outreach services, particularly in the context of large-scale technology and modernization initiatives. **Our experience spans the development of public information materials, standardized templates for press releases and stakeholder notices, tailored outreach resources for impacted communities, and guidance documents for consistent messaging and branding.**



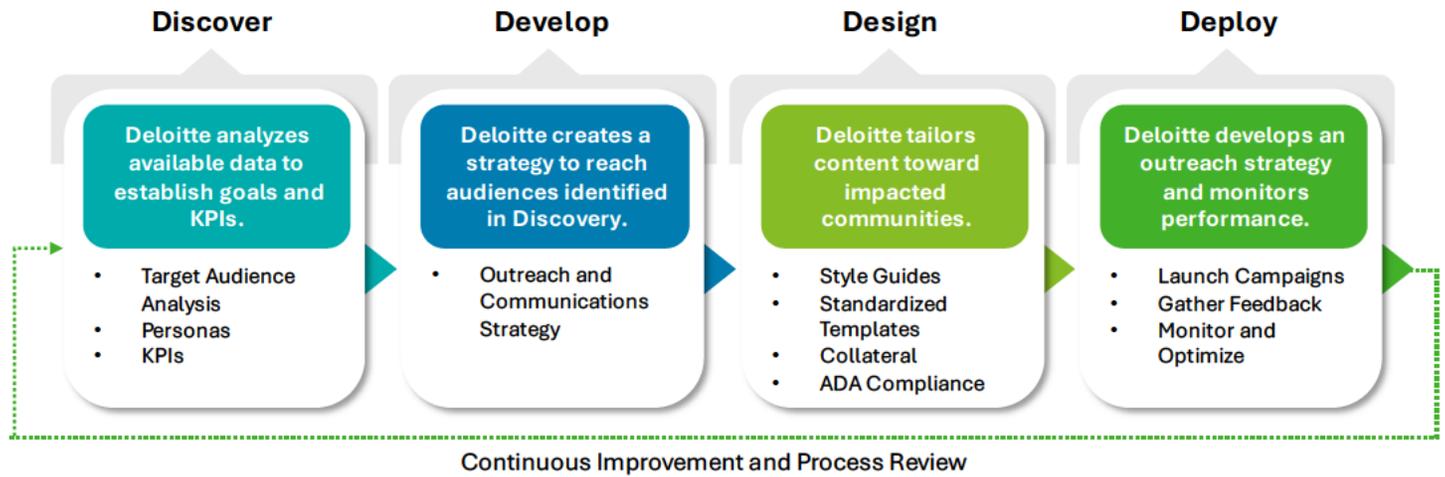
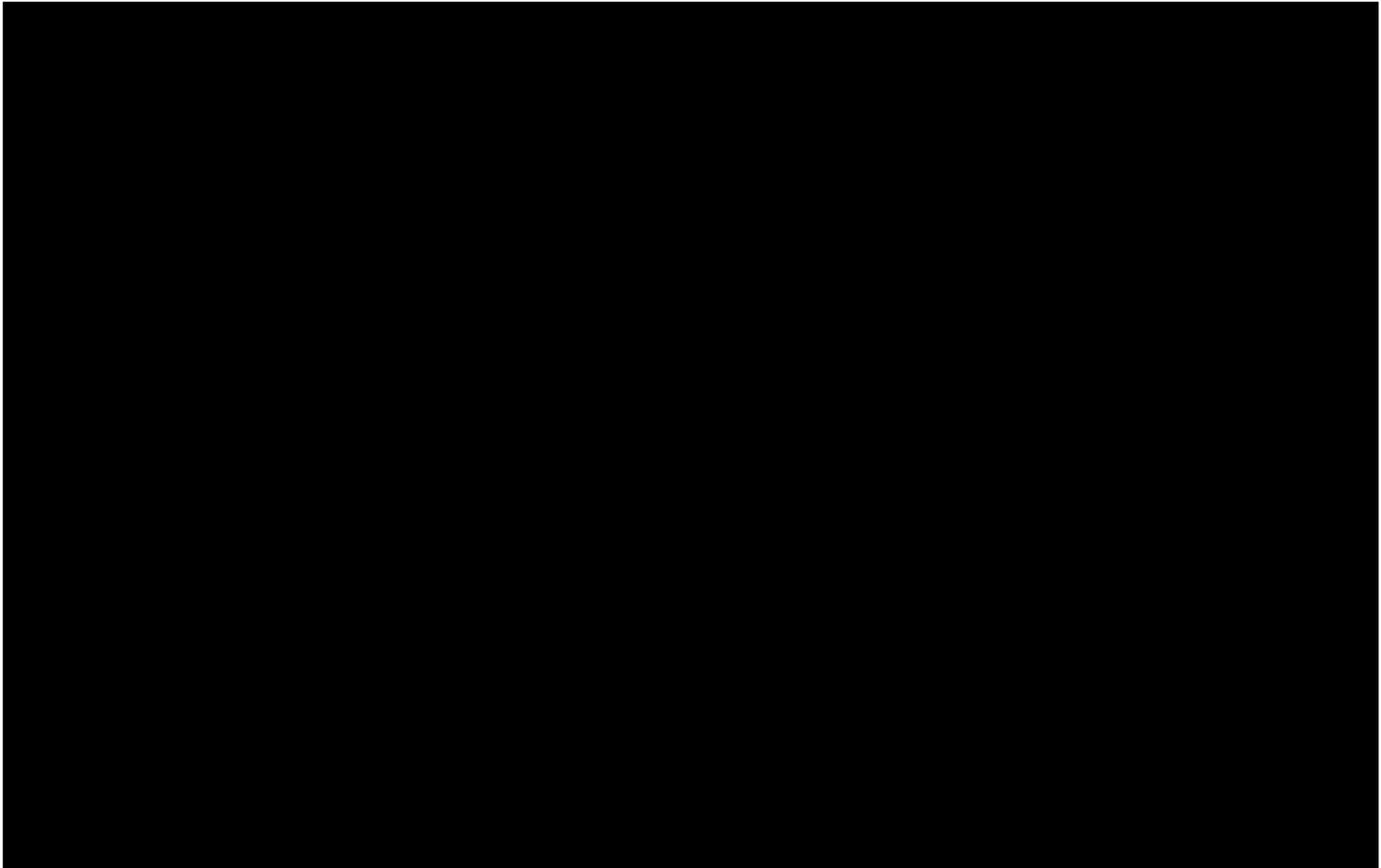


Figure 9 – Deloitte's Four Phase Methodology

Our creative arm, Deloitte Digital, has been recognized globally as a leader in digital marketing and public sector branding. For more than 15 years, Deloitte Digital has helped define and amplify public sector brands, earning accolades such as #2 Digital Agency Worldwide by AdAge and Digital Marketing Partner of the Year by Adobe, Google, Facebook, and AWS. We have successfully delivered outreach and enrollment initiatives for programs such as TennCare Connect, Texas.gov, Georgia Access, Elevate Florida, Georgia Pathways, BenefitsCal, and the modernization of eligibility systems for Medicaid, SNAP, and Louisiana's Healthy Louisiana program.

Table 41: Approach for Task 14: Communication, Public Information, and Outreach Support



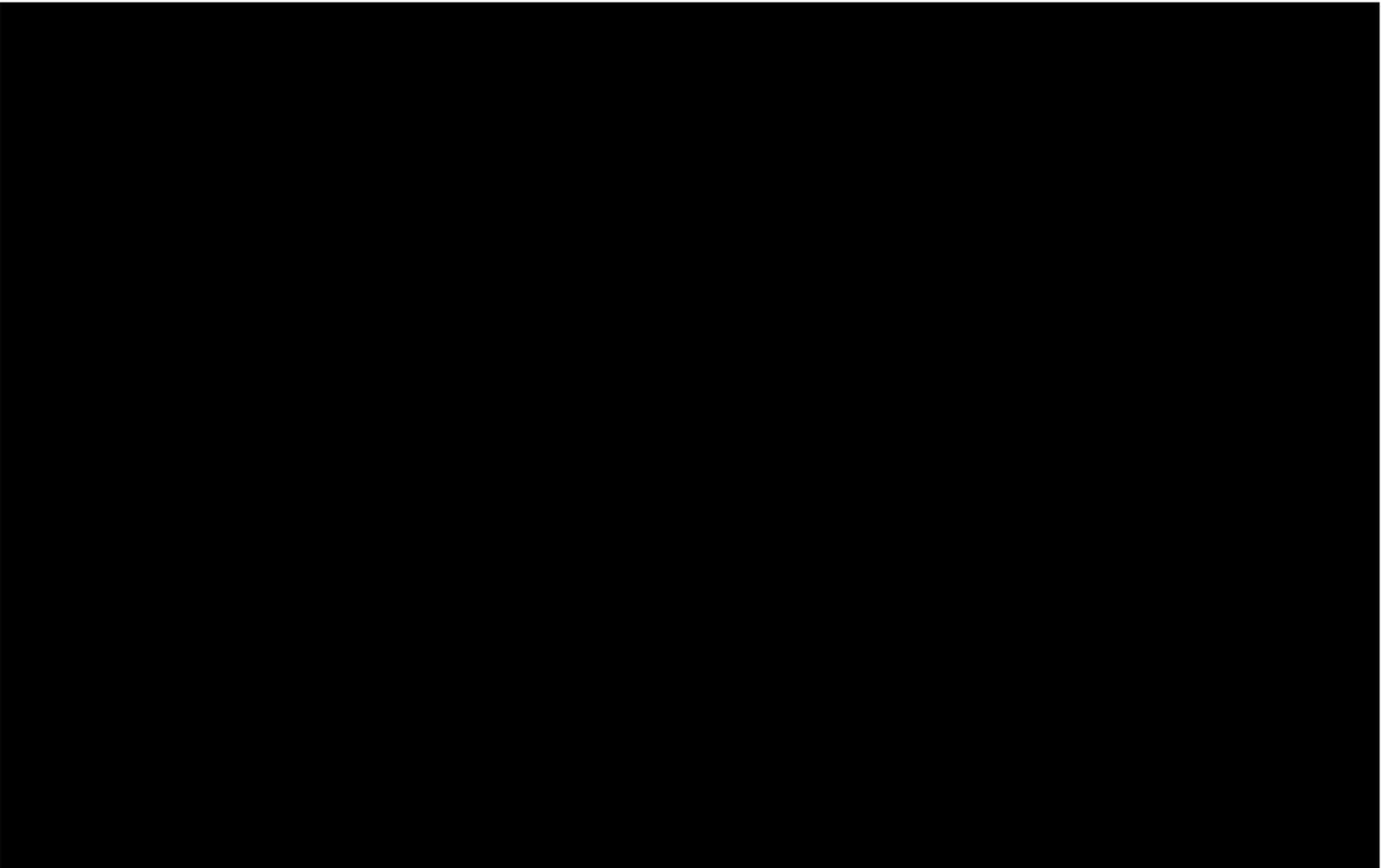


Table 42: Performance and Success Measures

Criteria	Description
Enhance Public Awareness	Monitor quantitative and qualitative metrics across platforms, using surveys, inquiries, and baseline data. Track website traffic, social reach, media mentions, event attendance, and program recognition to refine strategies.
Increase Engagement	Track stakeholder engagement via personalized, multi-channel communication by measuring interactions, participation, feedback, repeat visits, and activity rates across events, social media, email, and program resources.
Compliance	Use plain language and accessible, multilingual communication in program activities. Track translated materials, stakeholder comprehension, feedback, and accessibility to promote inclusivity, clarity, and improved understanding for individuals with Limited English Proficiency.

Table 43: Task 14 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Betsy Park Senior Manager</p>	<p>Betsy Park is a leader in the Advertising, Marketing, & Commerce Portfolio of Deloitte's Government and Public Services practice and serves as its operational lead across all state and local client work. She brings over 15 years of experience as a marketing advisor to civilian sector and state clients. Currently, Betsy works to help state and local clients promote products, benefits, and services to their constituents, building trust and credibility for these public health and benefit programs.</p>
 <p>Catherine Irvin Manager</p>	<p>Catherine is a manager based in North Carolina who has managed creation of a communications toolkit to support 500+ partners in CDC's Partnering for Vaccine Equity program that included materials such as fact sheets, talking points, briefings, website wireframes, and FAQs. She has also led publications workstream for FEMA's National Flood Insurance Program (NFIP), overseeing design and language to make sure America is equipped for and able to respond to disasters.</p>
 <p>Sarah Crump Staff – WSP USA Inc.</p>	<p>Sarah Crump is a communications and outreach professional with seven years of experience leading public engagement initiatives and managing digital communications for government and nonprofit programs. She excels at crafting compelling digital content, fostering stakeholder engagement, and promoting equity through accessible and inclusive messaging. Sarah has supported community outreach across sectors such as parks, climate-resilient infrastructure, and affordable housing, and is adept at planning and executing virtual engagement activities. Her expertise includes managing social media platforms, websites, and developing public-facing materials for federally funded safety and transportation projects. Sarah's work ensures that public feedback informs project goals and recommendations, supporting transparent and inclusive processes.</p>

4.3.15 Task 15: Grants Management

Effective grant management is the cornerstone of successful CDBG-DR program delivery, especially when navigating the intricate requirements of subrecipient contracting, compliance, and closeout. Deloitte brings a wealth of public sector experience, regulatory insight, and technology-driven solutions to help agencies administer federally funded disaster recovery programs with precision, transparency, and accountability. Our approach is grounded in a deep understanding of federal and state requirements, helping each aspect of program administration align with industry-leading practices and statutory guidelines.

From initial program implementation through ongoing monitoring, contracting, compliance, and eventually closeout, Deloitte applies proven methodologies and advanced digital platforms to streamline operations, mitigate risk, and enhance the impact of each grant dollar. We begin by conducting collaborative needs assessments and developing structured work breakdowns, which establish clear objectives, delineate roles and responsibilities, and optimize resource allocation. Our monitoring procedures leverage automated dashboards and secure data management systems to deliver real-time insights, track key performance indicators, and support continuous improvement across the grant lifecycle.

Deloitte's protocols for subrecipient contracting and compliance are designed to proactively address common program challenges. For example, we implement automated reconciliation tools and workflow alerts to minimize lags in drawdown reconciliation, helping agencies meet timely expenditure deadlines and avoid compliance risks. Our team also reviews and updates subrecipient agreement templates to include current requirements, such as resilience performance clauses, so contracts reflect evolving priorities and regulatory standards. Standardized onboarding sessions and periodic audits help all parties understand their obligations and maintain audit-ready documentation.

As programs move toward closeout, our team coordinates comprehensive reviews and supplies process guides to reduce administrative burden, providing an efficient and compliant transition. Our suite of digital tools—including secure cloud-based dashboards, automated alerts, and intuitive self-service portals—empowers grant administrators and subrecipients to efficiently manage compliance and reporting requirements. Through tailored training and expert support, Deloitte enables clients to meet federal mandates, build stakeholder confidence, and deliver timely, compliant disaster recovery assistance to communities in need. With Deloitte as a trusted advisor, agencies can be confident in their ability to facilitate effective grant management, safeguard public resources, and achieve meaningful outcomes for those they serve.

Table 44: Approach for Grant Management

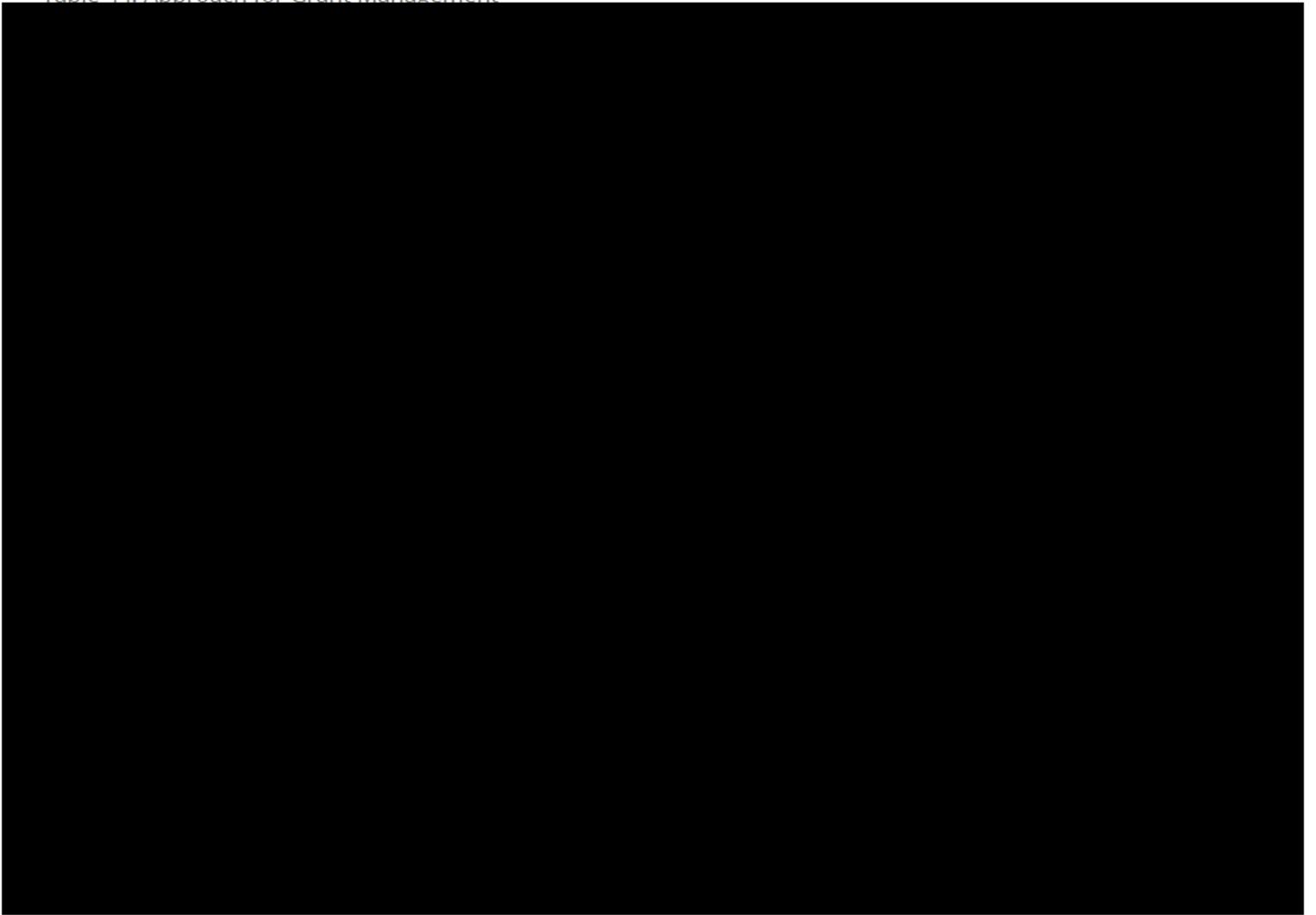


Table 45: Performance and Success Measures

Criteria	Description
Compliance	All processes and documentation adhere to applicable federal, state, and local regulations, with successful audits and minimal findings indicating strong regulatory alignment.
Reporting	Required reports are submitted punctually and in the correct format, with stakeholders provided access to real-time dashboards and tracking tools for program transparency.
Accuracy	Eligibility determinations, financial transactions, and data reporting are performed with a low error rate, providing reliable and trustworthy program outcomes.

Table 46: Task 15 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Joseph Simon Manager</p> 	<p>Joseph Simon is an accomplished grants management and disaster recovery professional with deep expertise in federal compliance, program implementation, and subrecipient oversight. He has led large teams in administering multi-billion-dollar grants, facilitating regulatory compliance with 2 CFR 200, HUD, and FEMA, and delivering audit-ready documentation. Joseph excels at developing streamlined processes, deploying digital tools for monitoring and reporting, and guiding clients through every phase of the grant lifecycle—from needs assessment and contracting to closeout. His strategic leadership and hands-on approach have helped public sector organizations maximize funding, reduce risk, and achieve program goals efficiently.</p>
 <p>Mike Munnelly Manager</p> 	<p>Mike Munnelly is a grant management professional with over eight years of experience. His expertise centers on grant administration, financial reporting, and project management. Throughout his career, Mike has played pivotal roles in supporting federal funding initiatives across multiple states, including substantial financial recovery efforts related to COVID-19. He has overseen the management of FEMA Public Assistance (PA), Coronavirus Aid, Relief, and Economic Security (CARES) Act, and American Rescue Plan Act (ARPA) funds focusing on compliance and effective resource utilization. Mike has guided numerous commercial entities through the complexities of federal funding, assisting them in navigating regulatory requirements and optimizing funding opportunities. Additionally, he has managed the financial aspects of large-scale construction projects for federal agencies, overseeing projects totaling nearly \$340 million nationwide. His responsibilities have included developing robust financial reporting systems and advancing accountability and compliance throughout project lifecycles</p>
 <p>Casey Soberon Senior Consultant</p> 	<p>Casey Soberon is a Crisis Recovery Senior Consultant and Compliance Team Lead in Deloitte’s Government and Public Services practice, specializing in federal grants management and compliance. She leads teams in delivering technical assistance, quality assurance, and project oversight for grantees of HUD and FEMA programs, including CDBG-DR, CoC, ESG, FEMA Public Assistance, and Hazard Mitigation. Casey is recognized for her trauma-informed, supportive approach to compliance, helping clients navigate disaster recovery and maintain funding integrity. She has developed widely used compliance training resources, led internal audits and risk assessments for multimillion-dollar grants, and managed reimbursement and closeout processes for state and local agencies. Prior to Deloitte, Casey coordinated Austin’s HUD Continuum of Care Program, developed the local Homelessness Diversion Program, and contributed to the city’s youth homelessness plan.</p>

 = proposed key personnel

4.3.16 Task 16: Technical Systems Specifications & Project Management

Effective monitoring and support of the State's System of Record is foundational to the success of CDBG-DR and other disaster response programs. Deloitte brings extensive technical expertise in both system development and business analysis, supporting technical specifications and modification across a wide range of application types and platforms. We understand that DCR currently operates multiple bespoke systems—including eGrants, the Salesforce platform, and OnBase imaging—which lack robust APIs and integration capabilities. This results in manual double entry, inefficiencies, and increased risk of data inconsistency. Deloitte's approach prioritizes the design and documentation of technical specifications that address these integration gaps. Recognizing that the System of Record has not yet been determined, our approach is designed to be flexible and responsive to evolving requirements, supporting alignment with DCR's operational needs, compliance standards, and long-term strategic goals. Deloitte's system design process begins with Human Centered Design (HCD) principles, focusing on the needs of both administrators and applicants. Through discovery sessions and stakeholder interviews, we document and translate business processes into intuitive workflows and process maps. These are refined in collaboration with DCR subject matter specialists, helping system functionality align with real-world requirements. Technical specifications—including user roles, security protocols, screen layouts, and features—are turned into epics and user stories that are then prioritized for development. Project management and delivery tools such as Jira will be used to create, catalog, manage, and track the progress of all requirements and system features. This provides 100% transparency and accountability for the System of Record requirements and project activities.

Deloitte will establish a dedicated project management structure for this engagement, leveraging proven methodologies and tools to drive accountability and progress and prevent schedule slippage. Project management will be responsible for developing a detailed project plan, facilitating regular status meetings, and maintaining risk and issue logs. By instituting clear governance, escalation paths, and performance monitoring, we will help DCR mitigate delays and support alignment with program objectives.

Our team leverages proven project management methodologies, and we have the extensive experience delivering using both Agile Sprints and Kanban, depending on your needs. When delivering using Agile sprints, we conduct daily stand-ups, sprint planning, and joint application design workshops to foster collaboration and clear communication among all stakeholders. All the user stories are documented and tracked in Jira (or similar tool) to capture details of the requirements and acceptance criteria. The user stories are then prioritized, loaded in sprint for development, tested, and demoed to Stakeholder groups to confirm acceptance. Throughout this process, risks, defects, and enhancements are captured and addressed proactively, with mitigation strategies developed through root cause analysis and impact assessment.

Deloitte’s GovConnect for Grants and Loans system, built on Salesforce, exemplifies our ability to deliver highly configurable solutions that support grant application intake, review, award, and monitoring—all while maintaining compliance with program rules and regulations. Our technical resources are adept at developing and documenting acceptance criteria, tracking performance metrics, and producing dashboards and progress reports that keep quality, schedule, and budget top of mind. Although GovConnect for Grants and Loans is not included in Deloitte’s pricing for this proposal, we welcome the opportunity to discuss it further should DCR require additional information.

By combining deep technical expertise, collaborative design, and rigorous project management, Deloitte empowers DCR to implement a robust System of Record that supports secure, accurate, and efficient data management, enabling mission-critical operations and regulatory compliance for disaster recovery programs.

[Redacted Table Content]

Table 48: Performance and Success Measures

Criteria	Description
Workflow & Technical Specs	Document workflows and technical requirements for the System of Record (SOR) based on stakeholder input.
System Design Collaboration	Engage DCR and partners to gather requirements, map processes, and design user-centric workflows.
Specification Development	Translate business needs into clear technical specifications and user stories for system implementation.
Project Management	Apply Agile and PMP industry leading practices to plan, track, and deliver system development on time and on budget.
Issue & Risk Management	Monitor progress, identify risks, and implement mitigation strategies to resolve issues promptly.
Performance Tracking	Define and report on metrics, dashboards, and progress to facilitate quality and accountability.
Compliance & Security	Provide system design that supports secure, accurate, and compliant data management for DCR operations.

Table 49: Task 16 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Damon Morris Senior Consultant</p>	<p>Damon Morris is a Senior Consultant, specializing in project management and leadership roles within government and private sector software implementations. Over the last decade, Damon has helped agencies modernize their software and amend their business processes to align with industry leading practices and industry standards. His former projects include the implementation of modernized systems for the energy sector and human services agencies, including child support and public assistance.</p>
 <p>Jacob Fyock Consultant</p>	<p>Jacob Fyock is a Consultant, specializing in Salesforce-driven solutions for government clients. He has played a pivotal role in the coordinated development of GovConnect for Grants GMS and a public portal with dynamic form configuration in Salesforce. Jacob excels at gathering feature requirements from cross-functional stakeholder teams and translating them into detailed user stories for each release, helping project deliverables align with client needs and industry-leading practices. He has supported comprehensive testing efforts in development sandboxes, identifying defects and potential enhancements, and has facilitated release walkthroughs and client-facing user acceptance testing (UAT) to drive successful implementations. Additionally, Jacob performs the system administrator role for the GMS system, provisioning user access, troubleshooting access issues and analyzing reports on data within the system to maintain secure and efficient operations.</p>

4.3.17 Task 17: Environmental Review

Deloitte has a proven record of delivering comprehensive, NEPA-compliant environmental reviews for federally funded programs, leveraging deep experience in regulatory compliance, project management, and stakeholder engagement. Our multidisciplinary team supports agencies such as HUD and NTIA, applying a systematic, scalable approach tailored to each project's requirements. By integrating risk management, quality assurance protocols, and continuous monitoring of evolving policies, Deloitte facilitates timely, accurate, and consistent environmental review processes. This technical approach outlines our methodology for project management, documentation review, and quality assurance, demonstrating our commitment to helping clients achieve program objectives while meeting all federal, state, local, and tribal requirements.

Deloitte and our teaming partners bring extensive experience analyzing grantee-prepared environmental documents to facilitate NEPA compliance and eligibility for grant funding. Our direct experience assisting the Department of Commerce's National Telecommunications and Information Administration (NTIA) and other federal agencies with NEPA compliance for large grant programs will assist in the efficient implementation of HUD-specific procedures and confirm that environmental assessments are prepared and evaluated consistently. We recognize that the shortage of qualified environmental reviewers can prolong Part 58 clearance, increasing the risk of "choice limiting action" violations. Deloitte is prepared to scale efforts to meet or exceed your team's demand, deploying experienced staff and leveraging technology to mitigate reviewer shortages and accelerate review timelines.

Deloitte delivers NEPA-compliant reviews in accordance with HUD guidance and 24 CFR Part 58, which governs Environmental Review Procedures for Entities Assuming HUD Environmental Responsibilities. We coordinate all steps—including the review process, compliance documentation, analytical standards, and public involvement—to help facilitate completion prior to fund release. In addition to federal requirements, Deloitte is well-versed in North Carolina's State Environmental Policy Act (SEPA), enacted in 1971 and amended by Session Law 2015-90. SEPA applies to actions involving public funds exceeding \$10 million or those affecting

more than ten acres of public land, particularly when proposed by a state agency and when there is potential for detrimental effects on natural resources, public health and safety, or cultural resources. Notably, SEPA stipulates that meeting the requirements of the federal NEPA process also fulfills SEPA requirements, provided the federal NEPA documentation is reviewed through North Carolina’s State Clearinghouse process. This alignment streamlines compliance for projects subject to both federal and state environmental review.

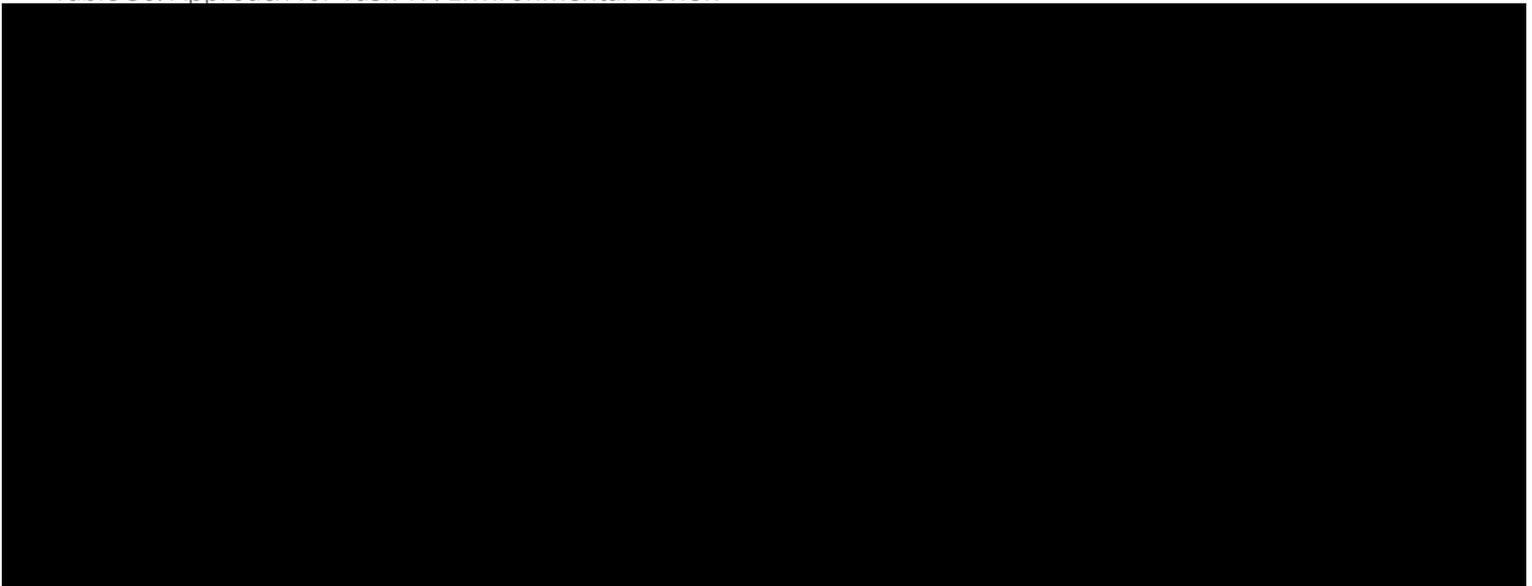
We guide clients through each step, leveraging experience with HUD’s HEROS system and North Carolina regulations, supporting project activities’ adherence to NEPA, HUD procedures, and state requirements. Our approach emphasizes proactive risk management, stakeholder engagement, and timely completion of regulatory milestones, with contingency planning to address potential delays due to reviewer shortages or evolving regulatory requirements.

Deloitte prepares environmental reviews for all required levels—Exempt, Categorically Excluded, Environmental Assessment, and Environmental Impact Statement—with unit cost and re-evaluation pricing available. Our systematic, milestone-driven approach includes: collaborating to develop a baseline scope and comprehensive Project Description; evaluating project scope and determining NEPA review level, maintaining SEPA compliance for North Carolina projects; coordinating to draft review documents and gather necessary studies; assisting with notices, public comments, and stakeholder engagement; addressing reviewer comments, performing quality checks, and submitting for agency approval; and performing re-evaluations as project scopes or regulations evolve.

Deloitte provides systematic preparation and maintenance of Environmental Review Records (ERR), organizing all statutory checklists, public notices, and correspondence. ERRs are updated throughout the project lifecycle and retained per HUD or local policy. Quality control uses standardized templates, checklists, and regular staff training. Internal reviews, peer reviews, and audits further strengthen compliance and documentation quality.

Deloitte offers expertise and a customized approach for infrastructure, economic revitalization, multi-family/workforce housing, and hazard mitigation programs. We efficiently manage reviews, stakeholder engagement, and agency coordination, tailoring workflows to each program’s needs and leveraging advanced project management tools. Our team is adept at navigating the complexities introduced by site-specific review requirements and reviewer shortages, helping projects remain compliant and on track. Deloitte’s project management facilitates timely, NEPA-compliant reviews, close collaboration, clear communication, and effective oversight. Our robust quality assurance program focuses on proactive risk management, regulatory compliance, and adaptability, with continuous monitoring of HUD and agency updates. This disciplined approach provides high-quality, compliant results for all projects.

Table 50: Approach for Task 17: Environmental Review



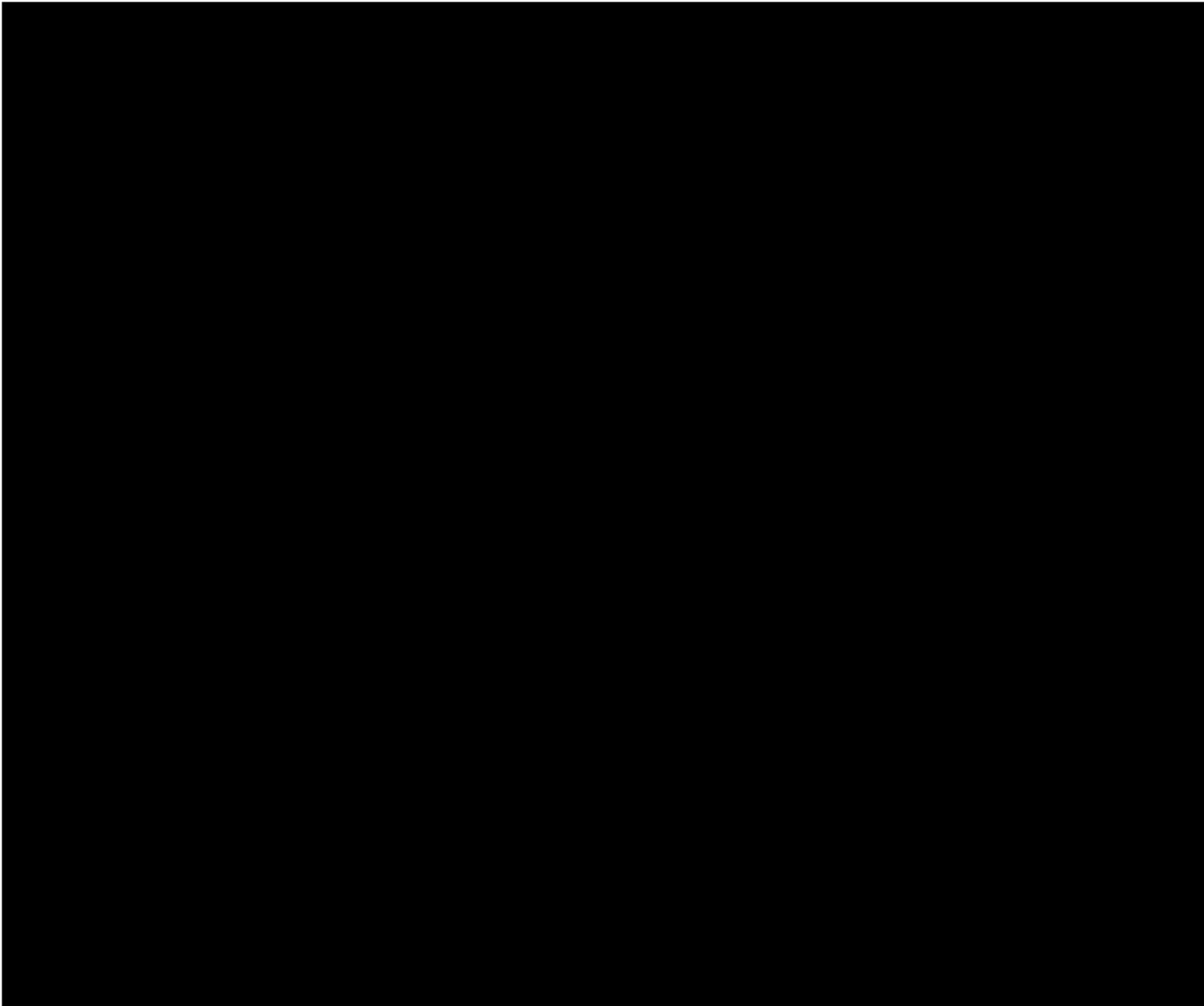


Table 51: Performance and Success Measures

Criteria	Description
Project Initiation and Coordination	Analyze environmental documents for NEPA compliance; scale review capacity to meet client demand and regulatory requirements.
NEPA-Compliant Reviews	Conduct reviews in accordance with HUD and 24 CFR Part 58; coordinate documentation and public involvement to help meet federal and state standards.
Documentation and Compliance	Prepare and maintain Environmental Review Records (ERR); use templates and checklists for accuracy and regulatory compliance.
Program Type Support	Tailor reviews for infrastructure, housing, economic revitalization, and hazard mitigation programs; coordinate with agencies.
Project Management	Use project management tools and meetings to monitor progress, address risks, and provide timely delivery of all documentation.

Criteria	Description
Quality Assurance	Perform internal reviews and risk management; update procedures as regulations change to facilitate consistent, compliant results.

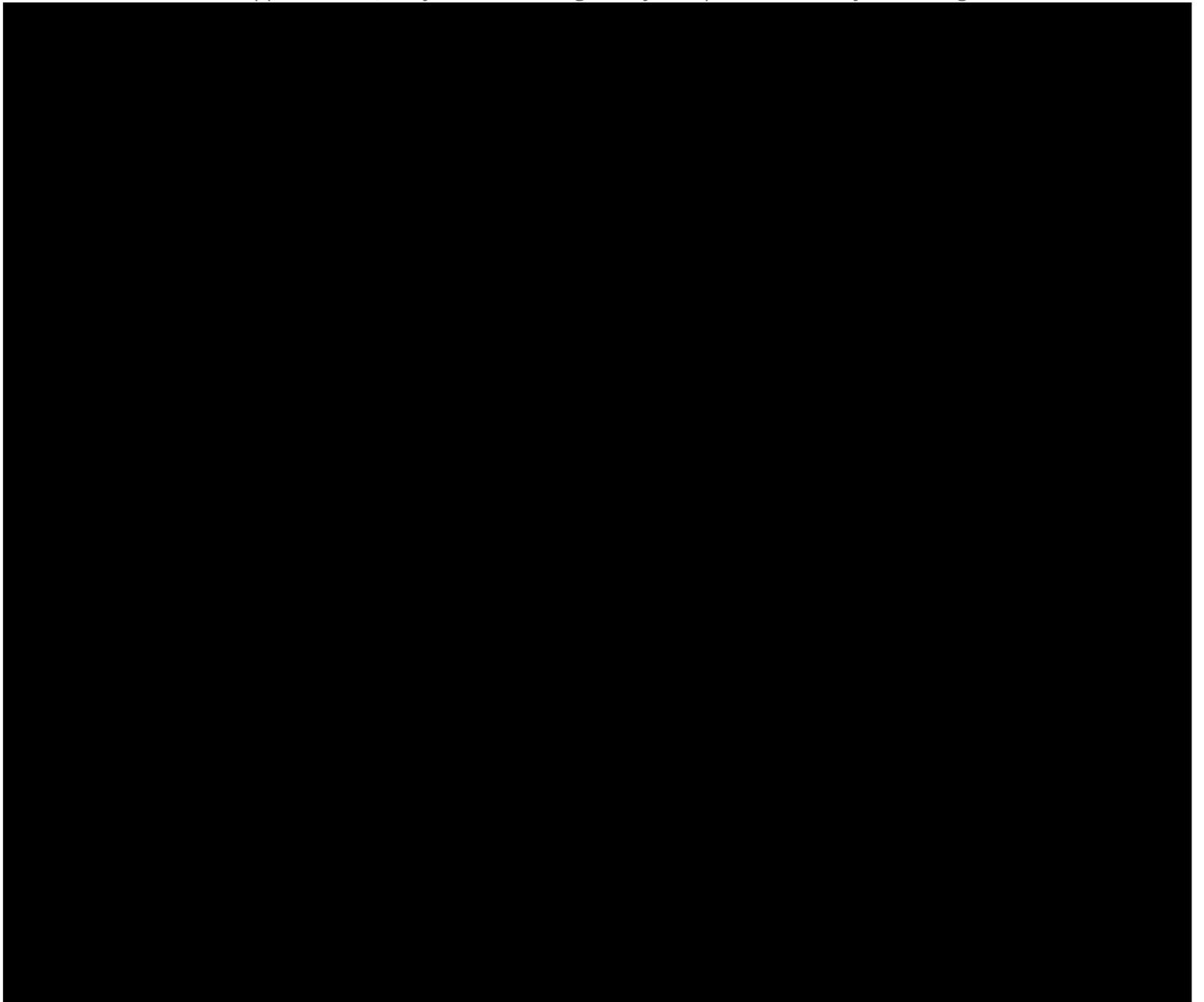
Table 52: Task 17 Specialist Spotlight

Name	Experience with Similar Requirements
 <p>Eric Graham Specialist Leader</p>	<p>Eric has over 30 years of diverse engineering, project management, and environmental consulting experience. He is a mechanical engineer with industry and consulting experience that has provided him unique insights into Government & Public Services, Technology and Energy Resources & Industrials. Eric is accomplished in many aspects of the NEPA permitting process (CEs, EAs and EISs), NHPA Section 106, Tribal Consultations, the CWA and the CAA and has successfully shepherded more than 400 project sites through the NEPA process. He has been responsible for leading large teams using learned management techniques and software tools to provide compliance with budget, schedule, and desired outcome</p>
 <p>David Herrington Solution Manager</p>	<p>David is a former federal regulator and environmental consultant with 40+ years of experience managing federal and commercial compliance programs/ projects as well as federal/ state grant programs. He is experienced in managing and preparing NEPA documents (EAs/EISs), NEPA compliance, and GSA contract management, in addition to HUD experience. David possesses extensive experience in managing regulatory compliance programs and environmental investigations focused on construction, housing, industry, mining, oil and gas pipelines. His background also includes environmental justice, climate change planning, water resources, natural resources, mitigation, and stakeholder engagement.</p>

4.4 Internal Systems for Quality Assurance, Regulatory Compliance, and Project Oversight

Maintaining rigorous quality assurance, regulatory compliance, and project oversight is essential to the success and integrity of any CDBG-DR initiative. These pillars help make disaster recovery programs both responsive to community needs and aligned with federal, state, and local requirements. A robust quality assurance framework helps identify and resolve issues early, minimizing delays and safeguarding public trust. Regulatory compliance requires that all activities—from procurement to environmental review—adhere to HUD guidelines and cross-cutting mandates such as 2 CFR Part 200 and 24 CFR Part 58. Meanwhile, disciplined project oversight provides transparency, accountability, and audit readiness, enabling grantees like DCR to deliver timely, equitable, and resilient recovery outcomes.

Table 53 : Deloitte’s Approach to Quality Assurance, Regulatory Compliance and Project Oversight



In the following sections, we provide additional details covering our commitment to Quality Assurance, Regulatory Compliance and Project Oversight.

4.4.1 Quality Assurance

HOW VENDOR WILL PROMOTE QUALITY AND TIMELY SERVICES



In pillar 1, **independence and objectivity** in fact and appearance is deliberately contemplated throughout an engagement enabling North Carolina to be confident that our team is unbiased and impartial. In pillar 2, **quality processes** are embedded throughout delivery, including reviews by subject matter specialists outside of the engagement. Our quality processes result in deliverables that require minimal to no rework or intervention from the State, saving time and costs. In pillar 3, we demonstrate our **commitment to continuous improvement** through obtaining customer feedback, investment in centers of excellence focused on technical developments relevant to CDBG funds, such as HUD regulations and federal compliance standards. Finally, in pillar 4, we **invest in the training and development** of our workforce so that client service delivery exceeds expectations. We require professionals at the manager level and above to possess relevant professional certifications. We also support an industry proficiency program with approximately 70% of IA professionals certified in their respective industry. For North Carolina, this means our team is proficient

in relevant professional standards, new developments in the industry, and executing with a consistent methodology that is tested across many clients.

4.4.1 Performance and Success Measurements

Performance and success measures are critical for completing future task orders over disaster recovery services because they promote accountability, efficiency, and resilience in high-stakes situations. By clearly defining Performance and Success Measures, we can monitor progress, identify gaps, and enforce compliance, which is **essential when lives, infrastructure, and public trust are at risk**. Moreover, these measures support continuous improvement by offering data-driven insights that inform future planning, ultimately strengthening disaster preparedness and response capabilities. Please reference the Performance and Success Measures tables that are included within Section 4.3 for additional information by Task.

4.4.2 Project Oversight

4.4.2.1 Transition

Transition is our responsibility, not your burden. Our transition effort is our first opportunity to demonstrate the enhanced level of client service that we are committed to delivering to DCR. Our approach is specifically designed to reduce the amount of time and effort spent by your people during the transition through centralized coordination of all transition activities.



Our Transition Principles

- The transition should be our burden not yours
- You should not feel like you are doing the work twice
- It should focus on the things that matter, when they matter
- It should be forward looking

Deloitte will lead the transition process, working closely with management to minimize disruption to your operations and staff. Our team has led numerous transitions of clients from Deloitte to other vendors and vice versa and knows exactly what is needed to engage in a crisply executed transition process.

Deloitte is committed to a efficient and effective transition process that fully aligns with DCR's requirements for immediate and ongoing transition assistance to an incoming Vendor. Our transition plan is designed to minimize disruption, maintain project continuity, and support the successful completion of the project.

Immediate Transition Assistance

Upon notification of transition, Deloitte will deploy a dedicated transition team with deep knowledge of the project's scope, deliverables, and operational context. This team will work collaboratively with DCR and the new Vendor to:

- **Facilitate Knowledge Transfer:** Provide thorough documentation, process maps, and system access to equip the new Vendor with the necessary information to assume responsibilities efficiently.
- **Conduct Joint Transition Workshops:** Organize interactive sessions to address questions, clarify requirements, and establish clear lines of communication between all parties.
- **Assign Transition Liaisons:** Designate experienced Deloitte professionals as points of contact for real-time support, troubleshooting, and guidance throughout the initial transition period.

Ongoing Transition Support

Deloitte recognizes that successful transitions require sustained engagement beyond initial handovers. Our ongoing support includes:

- **Continuous Collaboration:** Maintain open channels for regular check-ins, status updates, and issue resolution until the project is complete.
- **On-Demand Assistance:** Remain available at DCR's sole discretion to provide additional training, clarifications, or technical support as new Vendor needs evolve.
- **Performance Monitoring:** Track transition progress against predefined milestones, proactively addressing risks and supporting fulfillment of commitments.

Commitment to Client Satisfaction

Deloitte's approach is rooted in transparency, accountability, and collaboration. We understand the importance of a smooth transition for DCR and the new Vendor, and we will remain fully engaged and responsive throughout the process, adapting our support to meet DCR's expectations and facilitate project success.

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4.5 Staffing Capacity and Alignment of Proposed Staff

ABILITY TO QUICKLY SCALE FOR SHORT-TERM AND LONG-TERM ASSIGNMENTS

A critical component of an effective business relationship is a highly qualified and committed team of professionals who align with your culture, understand your operating landscape, and can translate that knowledge to deliver consistent, transparent, and dependable results. One of Deloitte’s greatest strengths is the breadth and depth of experienced resources that can be engaged to support this effort and the individual task orders. This depth also brings the ability to surge support for short periods at time critical junctures to address task orders timely and in keeping with North Carolina’s goals for the task at hand and in the context of overarching program goals. This structure provides DCR with high-level oversight, deep technical knowledge, engagement of technical and specialist resources, all resulting in a structure that delivers on a well-coordinated and successful engagement. The structure also enables us to quickly ramp up as task orders are released and surge resources for these engagements.



Ramp up quickly

Deloitte rapidly staffed the **New York State Vaccination project by mobilizing nearly 300 practitioners within just two weeks**, even as the effort spanned the Christmas holiday period. This accelerated deployment provided immediate support for large-scale vaccine administration, leveraging our national network and resource management capabilities to meet urgent client needs during a critical public health response.

Table 54 Deloitte Staffing Capabilities

STAFFING PLAN

Our proposed team, shown in the organizational chart below, is structured to deliver exceptional oversight, specialized content and task specific knowledge and experience, and efficient project execution. Proposed personnel will be available to support DCR staff between the hours of 8:00 AM and 5:00 PM Eastern Time Monday through Friday and may report onsite based on program needs. Our staffing approach provides clear definition for each role, maximizing accountability and value for DCR throughout the engagement, through aligning team members under the following team structure:

- State Term Contract Oversight:** The experienced team of Executive Leadership proposed will serve as the Project Management Office for the engagement overall. As task order opportunities are presented and come online, these professionals will retain oversight of all project activities and coordinate staffing decisions and surge support where and as needed with larger project vision in mind. This team also drives alignment with DCR’s objectives and serves as the ultimate point of escalation to guarantee quality and client satisfaction.
- Task Leaders and Task Specialists:** Task Leaders and designated support specialist resources are already identified and ready to execute task orders and deliverables aligned the 17 tasks. The group brings knowledge, experience, tools and leading practices that have been applied in similar projects and use cases in other jurisdictions. They are ready to bring useful templates, policies and procedures that have

been successful elsewhere and adapt them to the State of North Carolina Action Plan, customizing based on community needs and requirements.

- **Teaming Partners:** Deloitte’s approach to delivering exceptional results for North Carolina is distinguished by our strategic partnerships with AG Witt, McBride Consulting LLC, and WSP. By integrating AG Witt’s expertise in disaster recovery, McBride Consulting’s proficiency in grant management and technical assistance, and WSP’s robust engineering, infrastructure and environmental compliance capabilities, the Deloitte Team offers a comprehensive, multidisciplinary solution. This collaboration enables us to deliver high-quality technical assistance, support regulatory compliance, and apply innovative project management approaches, ultimately strengthening the state’s resilience and effectiveness in disaster recovery and mitigation efforts.

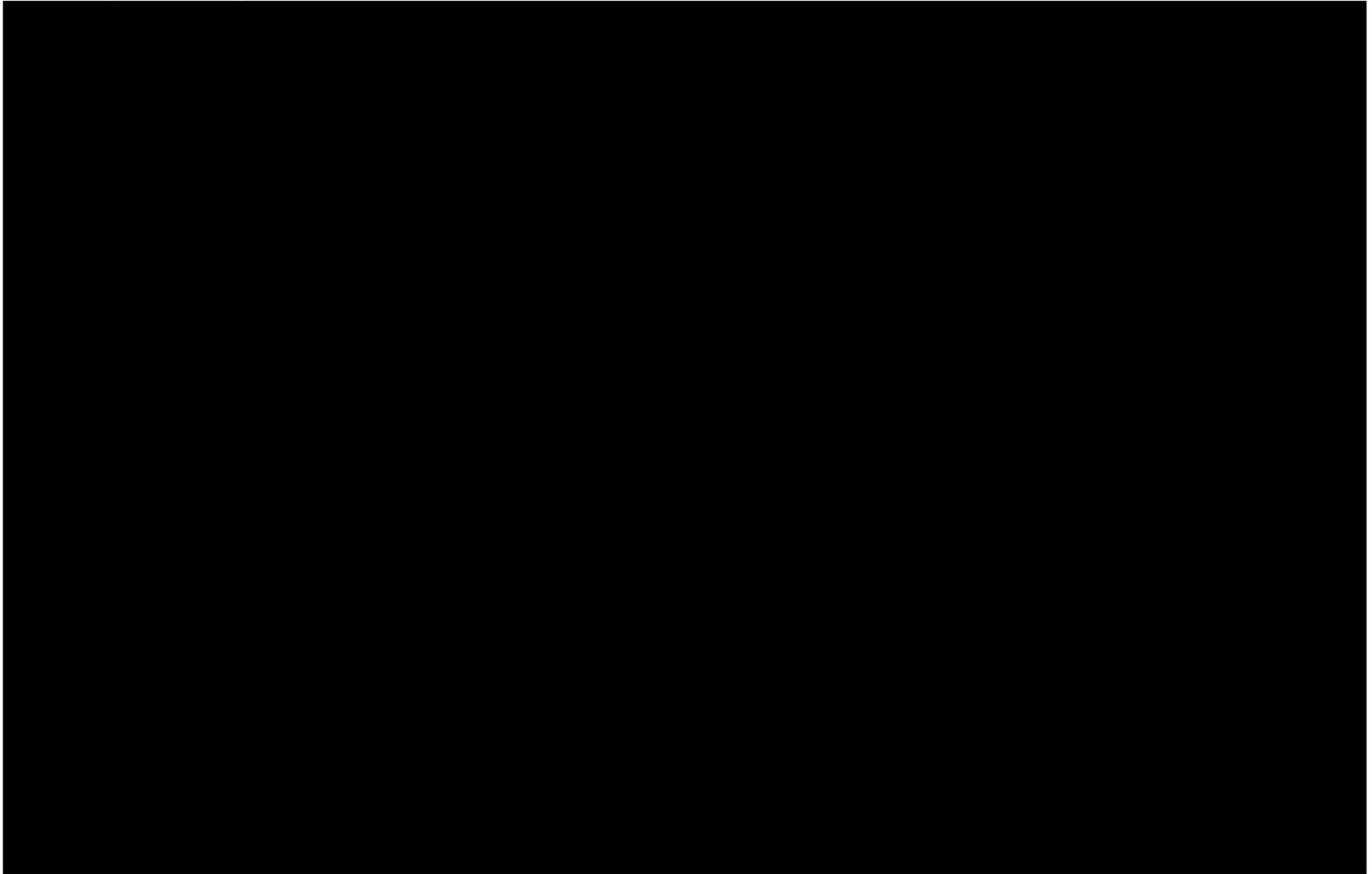


Figure 11: Organizational Chart

Figure 11 illustrates the proposed day-to-day Contract Oversight, Task Leaders, and Task Specialists (staff) assigned to support each task outlined in the RFP. Biographies (bios) have been provided for all proposed personnel: bios for Task Specialists can be found in Section 4.3 and the following section presents bios for State Term Contract Oversight, Task Leaders, and the Advisory Board. Advisory Board professionals are not shown in Figure 11, as they will be available to DCR as needed but are not part of the core day-to-day delivery team. Resumes for all key personnel can be found in Section 5.0.

ALIGNMENT OF PROPOSED STAFF WITH THE TYPE OF WORK TO BE PERFORMED

Our proposed team includes practitioners with experience working on different types of disasters, including many who know North Carolina’s unique needs and operating landscape, and some of whom have been impacted by these disasters personally. Our team has designed, implemented, and monitored several large programs on behalf of recipients, and we have advised numerous applicants, built complex products, led transformative change in organizations, and supported high-profile projects.

The staff assigned to this project possess extensive **real-world experience in CDBG-DR projects, and disaster recovery grants and programs more broadly**. Their hands-on experience includes managing large-scale disaster declarations as well as implementing strategic mitigation measures to protect and rebuild communities effectively. Additionally, our team has a proven track record of supporting North Carolina in various capacities, confirming that our approach is both informed by practical knowledge and tailored to meet the specific needs of the Tar Heel State. Many of the proposed team members have specific experience working with North Carolina state administrators and other leaders, as well as numerous potential partner agencies and organizations across the state. The North Carolina state leaders who have worked with the Deloitte team on other projects have noted in writing and provided direct and specific feedback on what an excellent experience they have had working with these dedicated professionals. North Carolina leaders are familiar with the high-quality work products the team can generate, as well as their expertise in effectively leveraging technology tools and developing and supporting secure and efficient processes, while always keeping timely completion of project milestones at the forefront. f Key Personnel

State Term Contract Oversight Leadership

[Redacted]

[Redacted]



[Redacted]
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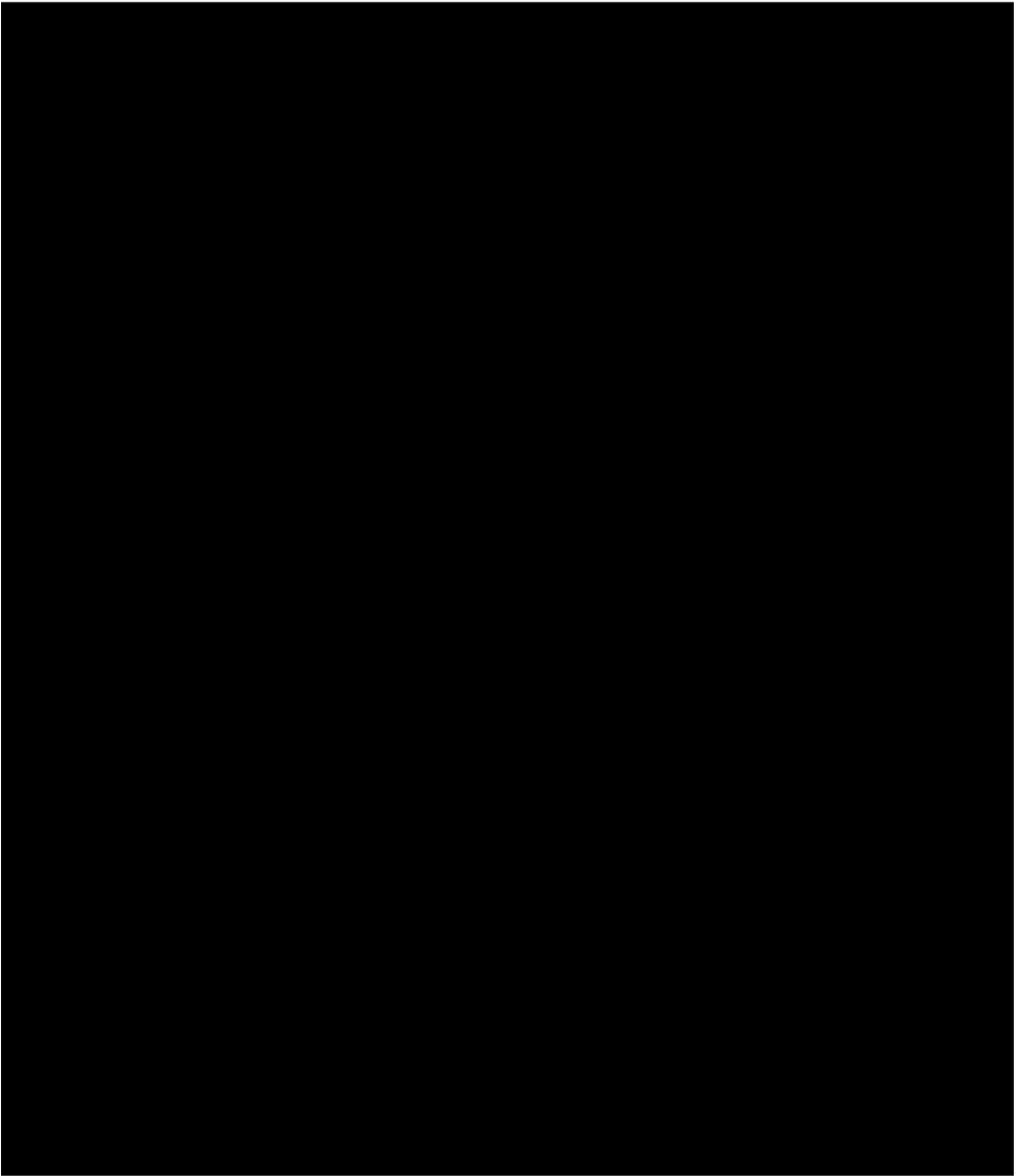
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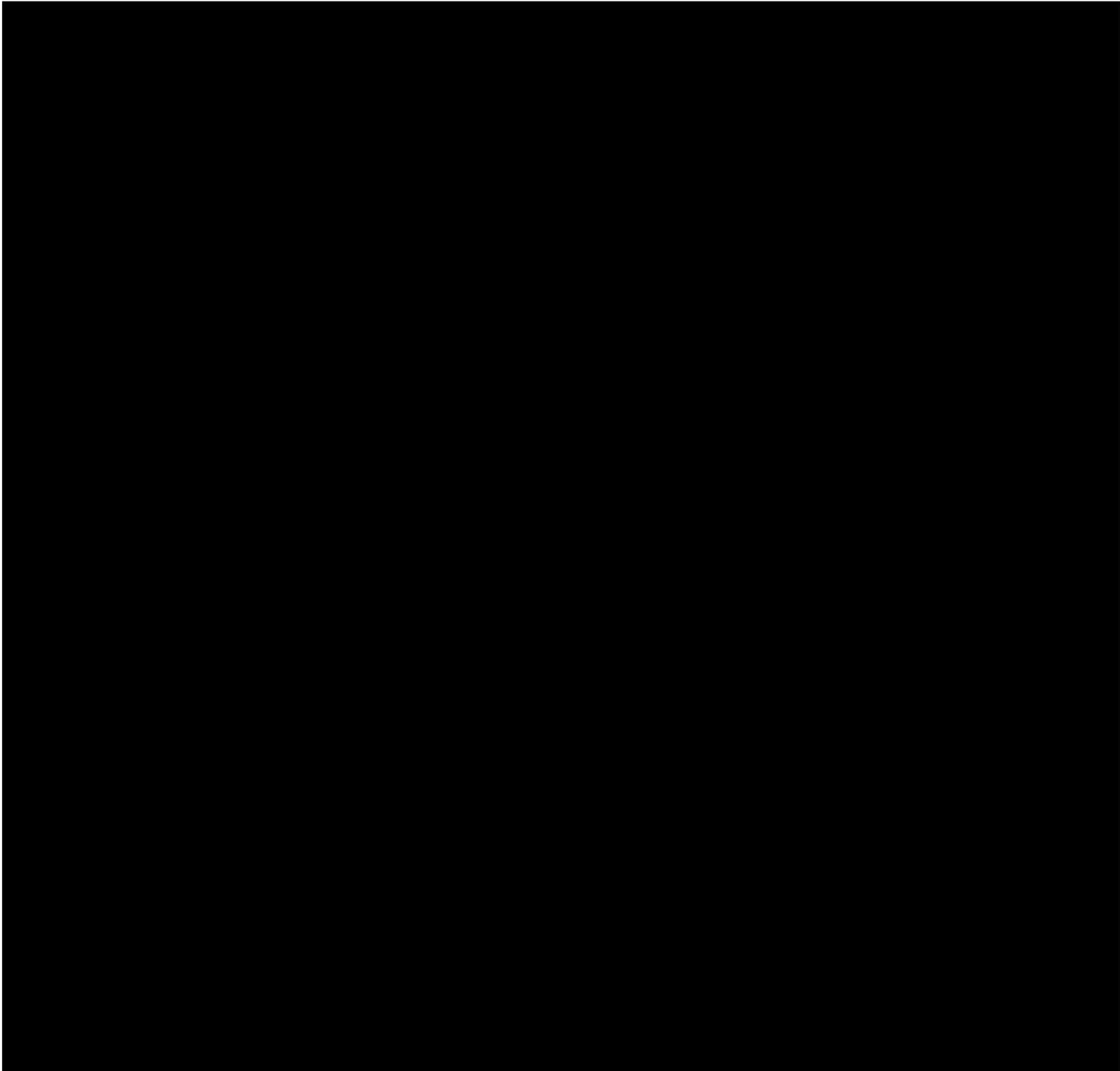


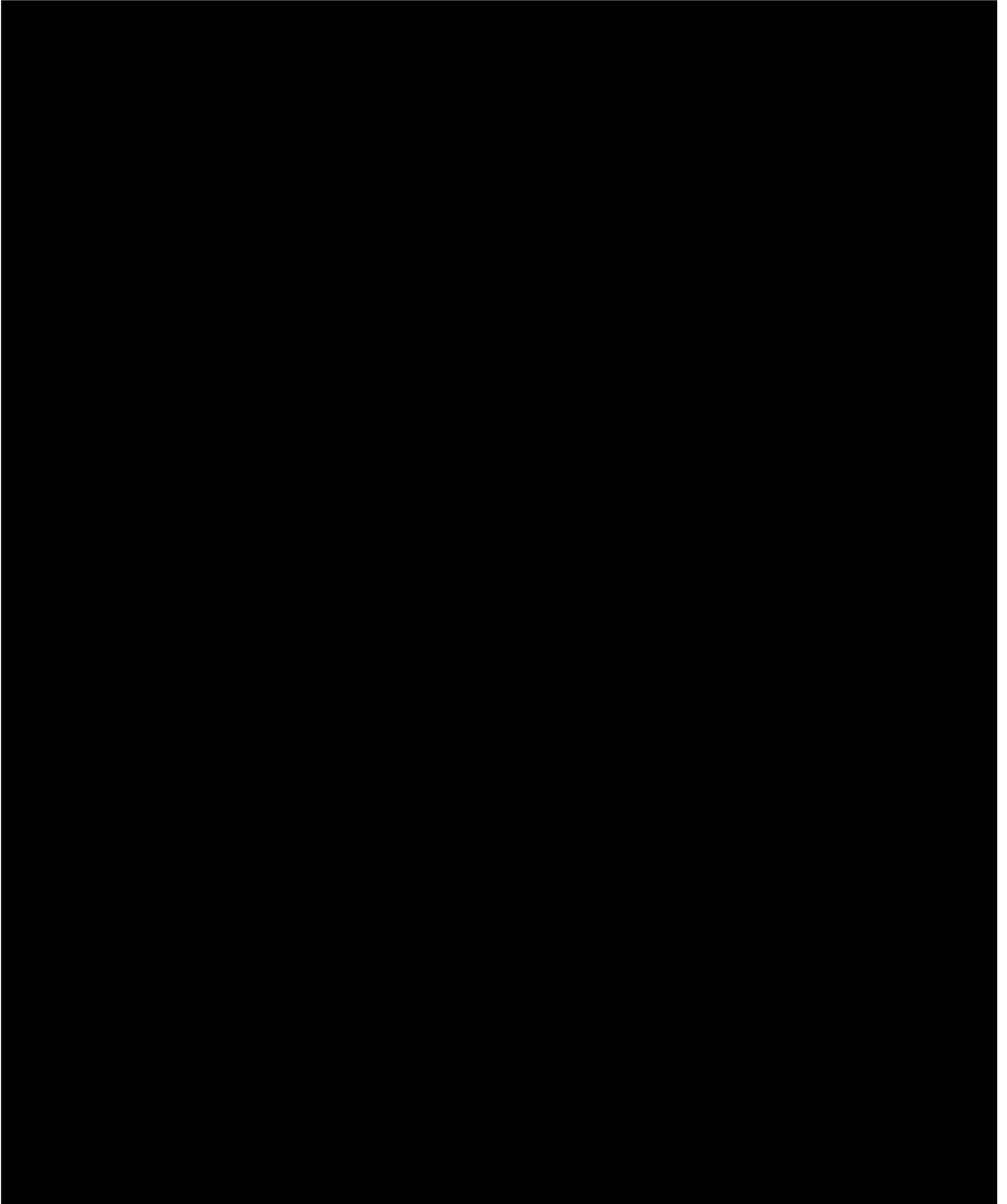
*Note: Damon Armeni and Linus Akanoh, Jr. will also provide support as Task Leads for the Programmatic and Grants Management Tasks, please refer to their bios within the State Term Contract Oversight section above.

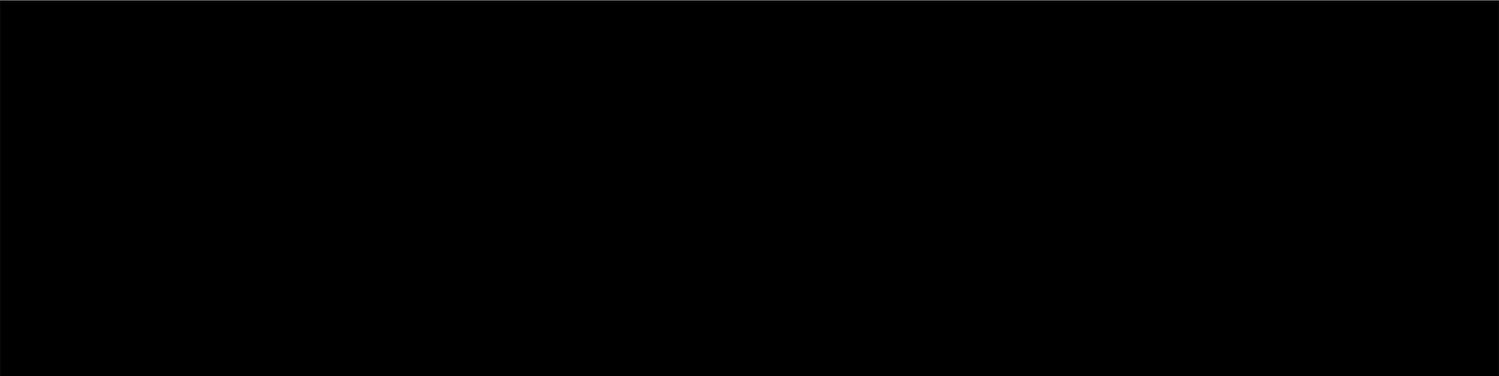
Advisory Board

To strengthen strategic direction and enhance program delivery, this proposal includes the establishment of an Advisory Board composed of experienced, mission-driven professionals. These advisors bring deep subject matter knowledge, regional insight, and a history of public service and community engagement—particularly within North Carolina. While not responsible for day-to-day operations, the Board will provide high-level guidance, share leading practices, and offer independent perspectives on program design, risk mitigation, and stakeholder alignment. Their involvement will help DCR navigate complex challenges, validate key decisions, and maintain transparency and accountability throughout the project lifecycle.

Table 57 : Biographies of Advisory Board

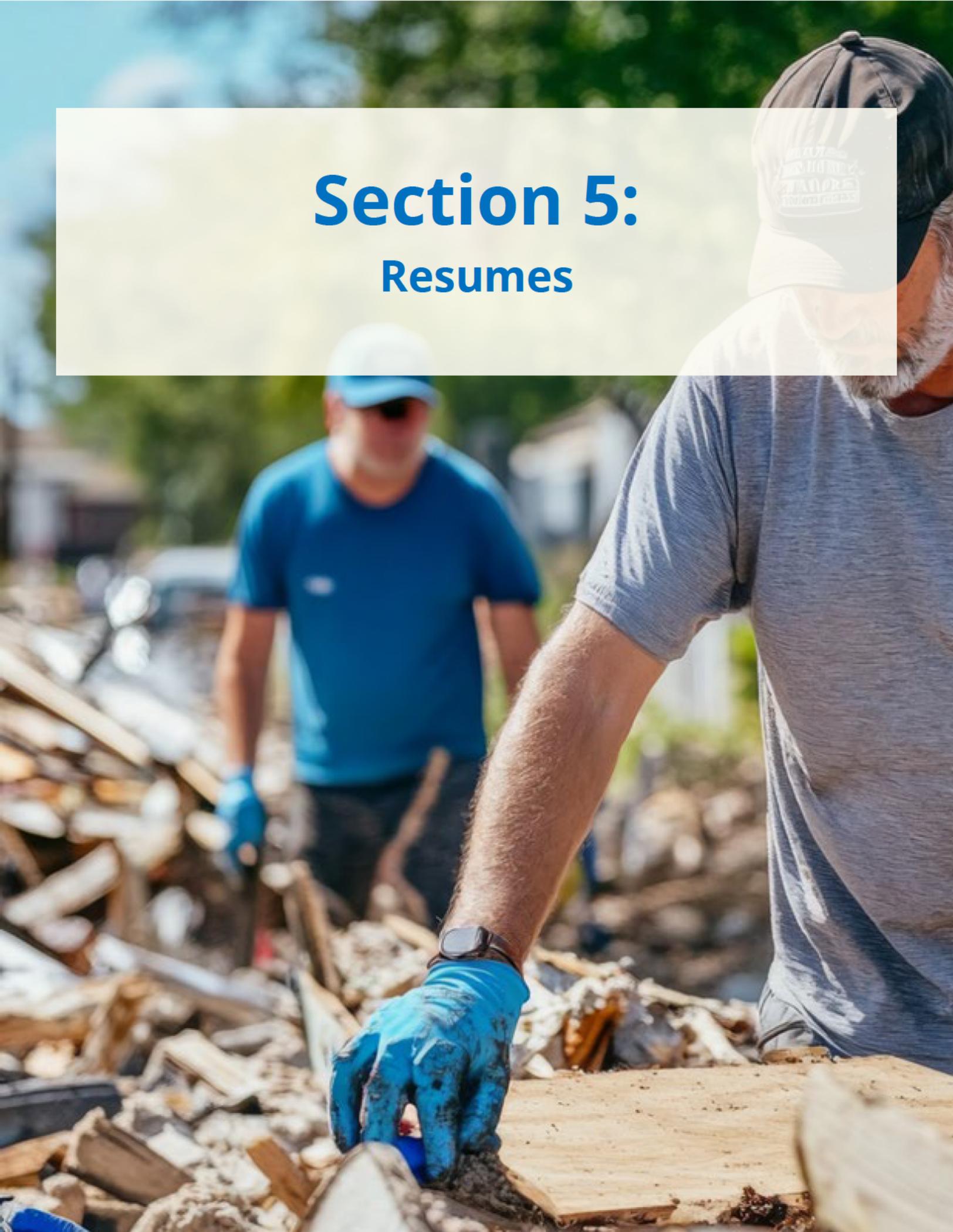






HOW VENDOR WILL RAMP UP SERVICES ACROSS THE TASK ORDER CATEGORIES

The proposed team is qualified, knowledgeable, and ready to act to respond to task orders as they come out, assess and pull in needed resources based on stated scope and budget. Deloitte's project leadership is well equipped to not only ramp up resources to address specific tasks but can quickly escalate related infrastructure for communication between tasks and workstreams as needed, making the response across task areas efficient and effective. While presented as discrete tasks, we recognize that integration and facilitation across these tasks, whether fully internal or across Teaming partners, will be vital to the ultimate success of CDBG-DR implementation that serves the citizens of North Carolina in the most effective and compassionate manner possible.



Section 5:

Resumes

5.0 Resumes

The source of knowledge is experience.

Our proposed team combines deep technical experience, programmatic insight, and North Carolina knowledge and experience to deliver tailored, high-impact support to DCR. Our team knows how to work together: We have a passion for client service excellence and understand how to tailor our services to your changing needs. The resumes of our proposed key (🔑) personnel underscore our commitment to aligning the right skills with your team’s needs.

Table 58: Key Personnel Labor Category Assignments

Labor Category	Key Personnel	Labor Category	Key Personnel
Executive	Damon Armeni Linus Akanoh, Jr Kelley Grow	Staff 2	Brendan Saunders Hugh Vu Adam Feeley
Supervisor	Joseph Simon Joe Gorsuch Mike Munnelly	Staff 1	Madison Moreau Madison Stone
Staff 3	Shayne Davis David Wright Eleanor Thompson	Admin	Belqis Rahim Raymonde Garcia

5.1 Executive Labor Category Resumes

Damon Armeni, Project Director



Labor Category: Executive

Task Alignment: All – Project Director

Years of Experience: 22+

NC Connection:
Experience working with OSBM, DEQ, DPS, and OSTI.

EDUCATION:

- Pacific Lutheran University, B.A., Political Science
- University of Virginia, M.A., Foreign Affairs
- United States Army Command and General Staff College
 - Defense Strategy Course

CERTIFICATIONS:

- FEMA Certified to Serve

AREAS OF SPECIALIZATION: (confirm)

- Grant Strategy
- Program Implementation
- Regulatory Compliance and Policy Development
- Communications Strategy
- Compliance Monitoring
- Subrecipient Monitoring
- Financial Oversight
- Grant Closeout

BACKGROUND & QUALIFICATIONS:

Damon Armeni has over 22 years of experience and is an acknowledged leader in public sector transformation at the intersection of emergency response, grants management, and national security. With specialization in navigating complex regulatory environments, Damon has advised federal, state, and local agencies—including FEMA and multiple state governments—on strategy, policy guidance, program design, and implementation. He has extensive experience leading high-stakes initiatives, managing multimillion-dollar programs, and shaping national disaster preparedness and response strategies. Damon supports developing and executing grant strategies, overseeing large-scale fund allocations, and supporting effective utilization of federal resources, as demonstrated by his leadership in projects such as NC’s grant strategy, Arkansas’ grant strategy, Cobb County’s \$240 million ARPA program, St. Louis County’s CARES and ARPA funds management, and New York State’s COVID-19 response.

RELEVANT EXPERIENCE:

State of North Carolina, Various Agencies (January 2024 – Present)

Leads the team with supporting OSBM and NC agencies in enhancing capacity to activate transformative investment dollars under the Bipartisan Infrastructure Law (BIL), the Creating Helpful Incentives to Produce Semiconductors (CHIPS) and Science Act, and the Inflation Reduction Act (IRA). He’s led work with DEQ, DOT, DPS and other agencies to develop grants for energy programs (HOMES/HEAR, CFI and CDHV) and leads the development of the Federal Actions Tracking dashboard for OSBM.

Oversight - Regulations, St. Louis County, Missouri (July 2020 – Present)

Leads a team responsible for evaluating proposed uses for CARES (CRF) and ARPA (SLFRF) funds in the county. Provided regular updates to County leadership and the County Board on programs which could be funded and their status. Developed compliant programs to deliver needed assistance throughout the County and is now overseeing project Closeout activities and subrecipient monitoring.

Oversight - Policies, Procedures, and Strategy, DOB, New York State (April 2020 – July 2020)

Led a team responsible for informing New York State leadership on rules, regulations, and implementation of over 43 discrete funding streams unique to the Federal Covid-19 response, developing and maintaining a single point reference document for all relevant funding streams, coordinating the development of a comprehensive strategy for the most

efficient use of Federal Grant dollars, and assisting New York State with Federal engagement and communications strategies.

External Stakeholder Engagement and Strategy / COR3, Puerto Rico
(March 2019 – December 2019)

Developed and recommended messaging and communications strategy relating to engagement with Federal Agencies, Congressional Stakeholders, and the public. Advised COR3 and Puerto Rico leadership on Disaster Response policies and procedures, regulatory and statutory guidelines related to disaster response and recovery and facilitated cogent communications with relevant stakeholders as needed to advance COR3 and Puerto Rican objectives.

Linus Akanoh, Jr, Strategic Project Advisor



Labor Category: Executive

Task Alignment: All – Strategic Advisor

Years of Experience: 18

NC Connection: Lead Partner for Crisis and Grant Management Services for NC serving clients in the state including NCPRO, OSBM and DEQ.

EDUCATION:

- University of Texas at Austin, Masters, Professional Accounting
- St. Edward’s University, B.A. Computer Information Technology
- St. Edward’s University, B.A. Business Administration in Accounting

CERTIFICATIONS:

- Certified Internal Auditor (CIA)
- Certified Information Systems Auditor (CISA)
- Certified Grants Management Specialist (CGMS)

BACKGROUND & QUALIFICATIONS:

Linus Akanoh Jr. is a Principal at Deloitte with over 17 years of experience leading large complex disaster recovery engagements to achieve statewide and localized recovery objectives in an expedited, cost-effective, and compliant manner. His experience in FEMA PA programs combines with transformative insights that help clients identify and activate federal and state grant funding, define, and operationalize effective strategies, implement risk-intelligent governance infrastructure, modernize technology capabilities, comply with multilevel regulatory and programmatic requirements, facilitate knowledge transfer, streamline and automate processes, and demonstrate transparency and accountability to stakeholders. Linus holds various certifications including CIA (Certified Internal Auditor) CRMA (Certified Risk Management Assurance), and Certified Grants Management Specialist (CGMS).

RELEVANT EXPERIENCE:

North Carolina Pandemic Recovery Program – SFRF Grant Monitoring (January 2024 – Present)

Helping NCPRO determine that State Fiscal Recovery Funds (SFRF) expenditures conform to federal and state laws, North Carolina administrative code, NCPRO MOU and contract requirements, United States Treasury guidance and NCPRO standard operating procedures and handbooks.

North Carolina Office of State Budget and Management – BIL, IRA and CHIPS Act Grant Activation (January 2024 – Present)

Providing technical assistance services, such as funding opportunity identification, stakeholder convening, and application development and submission, for North Carolina’s state agencies seeking to apply for and receive funding from the BIL, CHIPS and Science Act, and IRA.

Corporation for Public Broadcasting – FEMA Grant Administration and Oversight (August 2024 – August 2025)

Provide administrative and technical assistance to CPB and to public television and radio stations, as subrecipients, who will use NGWSGP subaward funds to update the stations’ equipment to the latest broadcast and alert and warning technologies to deliver timely and effective emergency warnings to the American people, especially in rural, tribal, and underserved communities with limited broadcast services.

State of Arkansas Department of Energy and Environment – Weatherization Assistance Program Administration (March 2023 – September 2023)

Assisting E&E’s Energy Office with the design, implementation, and operation of the expanded Weatherization Assistance Program (WAP) funded by the Infrastructure Investment and Jobs Act (IIJA).

- Certification in Risk Management Assurance (CRMA)

AREAS OF SPECIALIZATION: (confirm)

- Grant Strategy
- Business Process Transformation
- Compliance Monitoring
- Financial Management
- Subrecipient Monitoring
- Performance Management and Reporting
- Grant Closeout

District of Columbia Department of Human Services – Emergency Rental Assistance Program Administration (May 2021 – Present)

In response to the COVID-19 Public Health Emergency, the District of Columbia Government, through its Department of Human Services, Family Services Administration engaged Deloitte to facilitate the conceptualization, design, configuration, execution, and administration of program activities related to its U.S. Treasury Emergency Rental Assistance (ERA) Program.

Florida Division of Emergency Management – FEMA PA Grant Administration (October 2024 – Present)

Providing disaster grant management consulting and technical assistance services to assist four (4) Florida counties consisting of over 330 applicants affected by Hurricanes Helene and Milton.

Florida Department of Transportation – FEMA Cost Reimbursement (January 2025 – Present)

Provide staff augmentation support to FDOT to create compliant cost reimbursement packages in response to Hurricanes Idalia, Ian, Debby, Helene, and Milton.

Kelley Grow, Project Manager



Labor Category: Executive

Task Alignment: All – Program Manager

Years of Experience: 15+

NC Connection: Based in Raleigh, has direct family members impacted by Helene in Buncombe County

Currently serves OSBM, and has served DEQ, DPI, DOT, and DOA.

EDUCATION:

- North Carolina State University (NCSU), Master of Accounting
- NCSU B.S. Accounting (Summa Cum Laude)

CERTIFICATIONS:

- Certified Public Accountant (CPA) (NC, VA)
- Project Management Professional (PMP)

AREAS OF SPECIALIZATION:

- Grants Management
- Financial Management
- Fraud Prevention
- Audit Readiness
- Financial Oversight

BACKGROUND & QUALIFICATIONS:

Kelley Grow is a senior program and financial management professional with over 15 years of experience supporting federal and state agencies in grants management, compliance, internal controls, and risk mitigation. She specializes in OMB Circular A-123, large-scale federal funding programs, and has advised agencies such as the State of NC, HHS, the Department of Education, and HUD. Kelley is recognized for translating complex regulations into practical solutions, leading cross-functional teams, and managing multimillion-dollar compliance and recovery initiatives. She is a licensed Certified Public Accountant (CPA) in North Carolina and Virginia and Project Management Professional (PMP) certified.

RELEVANT EXPERIENCE:

State of North Carolina, Various Agencies (April 2024 – Present)

Assists the OSBM and NC agencies in enhancing capacity to activate transformative investment dollars under the Bipartisan Infrastructure Law (BIL), the Creating Helpful Incentives to Produce Semiconductors (CHIPS) and Science Act, and the Inflation Reduction Act (IRA). Ms. Grow assisted the North Carolina Department of Public Instruction (NCDPI) in successfully pursuing \$8,680,000 from the Environmental Protection Agency (EPA) to replace 31 diesel school buses across 12 counties, including in Western NC, with 31 electric school buses. She led a team assisting in identifying project partners and priority locations for North Carolina’s Department of Transportation (NCDOT) to address key project merit criteria including safety and accessibility considerations of electric vehicle (EV) charger sites to apply for the Charging and Fueling Infrastructure Grant program for Western NC. She supported the development of the successful state-wide Home Energy Rebate (IRA Section 50121 and 50122) grant program applications and blueprints, helping secure over \$200M of Department of Energy (DOE) funding to support climate and socio-economic goals in reducing energy burdens for low-to-moderate income (LMI) North Carolinians, supporting the preparation of the state to achieve its net-zero goals, reducing greenhouse gas (GHG) emissions statewide. She is currently supporting OSBM in determining impacts on BIL, CHIPS and IRA programs based on recent Executive Orders, guidance and congressional spending reductions.

U.S. Centers for Disease Control and Prevention (January 2018 – March 2025)

Supported 5,648 grant awards to 2,424 recipients, generating 16,433 actions and processing nearly \$49.2 billion in funding for public health programs and research. She advised on data analysis, compliance with laws and regulations, and facilitated testing kickoff meetings with

emergency response specialists for Hurricane, Zika, and Opioid emergencies.

Oversaw the creation of policies and procedures for CDC's core business units to include Project Management, Management Assessment, Risk and Compliance, and Information Technology units. She also provided strategic guidance to the on the ground team supporting CDC's Center for Global Health in performing operational and compliance risk assessment services for a cooperative agreement.

U.S. Department of Health and Human Services (April – November 2018)

Advised the ReInvent Grants Management Sprint team on promising practices related to grant and risk management and program integrity as the team developed a journey map, which was shared with Executive Leadership, leading to future phases.

5.2 Supervisor Labor Category Resumes

Joseph Simon, Project Support



Labor Category: Supervisor

Task Alignment: 15

Years of Experience: 18+

NC Connection:

Currently serves NCPRO

EDUCATION:

- Syracuse University Maxwell School of Citizenship and Public Affairs, M.A. Public Administration and International Relations
- Drew University, B.A. Spanish

CERTIFICATIONS:

- Certified Grants Management Specialist (CGMS)
- Project Management Professional (PMP)

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Monitoring
- Disaster Recovery
- Audit Readiness

BACKGROUND & QUALIFICATIONS:

Joseph Simon is an accomplished program manager with extensive experience in grants management, financial administration, and disaster recovery. He has led large, multidisciplinary teams supporting federal, state, and local agencies in the administration of complex grant programs, including FEMA Public Assistance, ESSER, State Fiscal Recovery Fund, and the Coronavirus Relief Fund. Joseph’s experience spans subrecipient monitoring, compliance program design, risk reduction, and process improvement. He has successfully guided clients through regulatory challenges, closeout processes, and audit readiness, leveraging deep knowledge of federal and state regulations (including 2 CFR 200 and US Treasury guidance). Joseph is recognized for his ability to develop management plans, standard operating procedures, and internal controls that drive operational efficiency and program integrity.

RELEVANT EXPERIENCE:

North Carolina Pandemic Recovery Office, State Fiscal Recovery Fund (January 2024 – Present)

As the lead manager on the North Carolina Pandemic Recovery Office (NCPRO) engagement, Joseph played a central role in establishing the compliance plan and served as a subject matter advisor on subrecipient monitoring for the team. Leveraging deep knowledge and experience in federal and state grant program requirements, he guided the development and implementation of robust controls and tailored monitoring protocols to promote the proper use of funds as well as program integrity. This approach emphasized meeting subrecipients where they are, fostering teachable moments and building capacity rather than simply identifying compliance issues. By collaborating closely with stakeholders and deploying leading practices in documentation, risk assessment, and digital enablement, Joseph helped position NCPRO to navigate evolving regulatory expectations, safeguard public resources, and support North Carolina’s recovery as a force for good.

Florida Division of Emergency Management, Hurricanes Helene and Milton Recovery (October 2024 – Present)

Joseph leads a team of 60 professionals providing technical assistance to subrecipients of the Public Assistance grant program in response to Hurricanes Helene and Milton. He directly supervises a growing team of 16 specialists responsible for 100% financial validation of large projects, confirming strict compliance with 2 CFR 200 requirements. Joseph oversees comprehensive grants management and subrecipient monitoring, guiding entities through expenditure validation, federal reimbursement, and closeout processes. Leveraging deep expertise in federal grants compliance, he develops and delivers technical and strategic training to

- Financial Oversight
- Grant Management

promote audit-ready documentation and consistent adherence to federal regulations across all project teams.

New Jersey State Policy – Coronavirus Relief Fund Grants Management and Integrity Monitoring (September 2021 – October 2022)

Joseph led a team of 18 integrity monitors and compliance specialists in New Jersey’s successful closeout of its \$2.4 billion Coronavirus Relief Fund grant. He designed and implemented a comprehensive compliance program grounded in leading practices from grants management and government finance, confirming alignment with U.S. Treasury guidance, 2 CFR 200, and state regulations. Joseph guided his team in documenting and testing financial support, resolving audit findings, and substantiating cost eligibility for final grant reporting.

Florida Division of Emergency Management, Hurricane Irma Recovery (July 2018 – March 2020)

Joseph managed a team of 35 professionals on a Florida state government contract, overseeing grants management and subrecipient monitoring to maintain strict compliance with 2 CFR 200 requirements for subrecipients of the Public Assistance grant program. He led three compliance-focused teams in validating expenditures, monitoring subrecipient activities, and guiding entities through federal reimbursement and closeout processes. Leveraging his specialization in federal grants compliance, Joseph developed and delivered technical and strategic training to support consistent, audit-ready documentation and adherence to federal regulations.

City of New York Office of Management and Budget – Hurricane Sandy Recovery (March 2013 – May 2015)

Joseph consulted for New York City’s Departments of Transportation, Sanitation, and Environmental Protection, developing federal grants reimbursement strategies in the aftermath of Hurricane Sandy. He provided grants management and analytical support for hundreds of millions of dollars in expense tracking and capital projects, including wastewater treatment plants, debris removal, and emergency protective measures. Joseph also supported the city’s Office of Emergency Management as part of the 404 Hazard Mitigation Grant Proposal team, contributing to successful applications for significant federal funding to support the city’s recovery and resilience initiatives.

Joseph Gorsuch, Project Support



Labor Category: Supervisor

Task Alignment: 8

Years of Experience: 10

 **NC Connection:**

Currently serves NCPRO.

EDUCATION:

- Syracuse University Maxwell School of Citizenship and Public Affairs, M.A. Public Administration
- State University of New York at Oswego, B.A. Political Science,
- State University of New York College of Environmental Science and Forestry, Certificate of Advanced Study (CAS) – Environmental Leadership

CERTIFICATIONS:

- Project Management Professional (PMP)

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Disaster Recovery
- Audit Readiness

BACKGROUND & QUALIFICATIONS:

Joe Gorsuch is a Manager with Deloitte and brings 10 years of experience leading and supporting community engagement, disaster response, and federal grants compliance efforts for state and local governments. He has comprehensive knowledge of the grant management life cycle and specializes in leading, training, and guiding teams to address complex challenges across all levels of government.

Since January 2024, Joe has supported the State of North Carolina’s Pandemic Recovery Office (NCPRO) as the Project Manager, serving as NCPRO’s main point of contact, leading compliance monitoring and technical assistance efforts for state agencies and non-state entities. His recent work with North Carolina provides a strong foundation for supporting the Division of Community Revitalization (DCR), as he understands state processes, regulatory requirements, and stakeholder needs.

Joe’s experience in federal grants management, combined with his collaborative approach, allows him to collaborate with clients to drive impactful solutions. By fostering strong relationships and open communication, he helps government clients achieve meaningful and sustainable results.

RELEVANT EXPERIENCE:

State of North Carolina, Pandemic Recovery Office (January 2024 – Present)

Since January 2024, Joe has served as Deloitte’s primary point of contact and Project Manager for the North Carolina Pandemic Recovery Office (NCPRO), leading State Fiscal Recovery Fund (SFRF) compliance monitoring and acting as the American Rescue Plan Act (ARPA) subject matter advisor. In this role, Joe directed a team of 10 professionals responsible for administering compliance monitoring and technical assistance for North Carolina’s state agencies and NCPRO’s direct subrecipients. He led the design and implementation of a comprehensive technical assistance training program for federal grants management, strengthening statewide grant administration capabilities. Joe oversaw the development and strategic rollout of the monitoring plan and tools, supporting compliance across the State’s \$5.4 billion SFRF allocation. He managed all aspects of the Project Management Office (PMO), including staff oversight, day-to-day activity coordination, and fostering the professional growth of team members. Additionally, Joe developed a comprehensive Personally Identifiable Information (PII) plan and supporting procedures to mitigate operational risk and protect sensitive data throughout the subrecipient monitoring process.

- Financial Oversight
- Grant Management

State of New Jersey, Department of Community Affairs (March 2023)

Joe supported a short-term task order to provide federal grants management technical assistance to the state and its American Rescue Plan Act (ARPA) recipients. As one of Deloitte's subject-matter advisors and a key presentation content creator, he delivered three two-hour technical assistance webinars. Joe advised the client on strategies to strengthen compliance and monitoring practices, with a focus on the timely spenddown of federal funds.

City of Syracuse, New York (June 2016 – June 2018; October 2020 – October 2022)

Joe served as the Director of Risk & Safety for the City of Syracuse, leading the city's COVID-19 pandemic response and managing \$123 million in American Rescue Plan Act (ARPA) funding. He oversaw subrecipient monitoring and federal reporting to the U.S. Department of the Treasury, supporting compliance and transparency. Joe also led the City's strategy for a \$1.4 billion revitalization project to rebuild the city's historic 15th Ward, collaborating with the State of New York, U.S. Department of Housing and Urban Development (HUD), housing implementation vendors, and community stakeholders such as impacted residents. In this role, Joe also helped oversee the housing implementation vendor during the planning and financial review phases for delivering over 1,600 single-family and multi-family housing units and expanding critical community services for residents. He monitored contractor performance to confirm adherence to deadlines and local, state, and federal regulations. Additionally, Joe served as Director of Constituent Services, acting as the principal liaison between the Mayor's Office and the public, representing the mayor at public events, working as an ombudsman with City agencies, and participating as a board member on the Mayor's behalf.

Mike Munnely, Project Support



Labor Category: Supervisor

Task Alignment: 15

Years of Experience: 7+

NC Connection:

Served as a key member of project leadership team for North Carolina Electric Membership Corporation to facilitate compliance with Department of Energy Office of Clean Energy Demonstrations (OCED) Long Duration Energy Storage Grant requirements.

EDUCATION:

- Pennsylvania State University, B.S. Finance

CERTIFICATIONS:

- Project Management Professional (PMP)

AREAS OF SPECIALIZATION:

- Audit Readiness
- Financial Management
- Financial Reporting
- Grant Administration
- Grant Monitoring
- Compliance

BACKGROUND & QUALIFICATIONS:

Mike Munnely is a manager with over seven years of experience in grant administration, financial management, and audit readiness. Mike has played a critical role in financial recovery efforts related to COVID-19, overseeing the management of FEMA PA and Coronavirus Aid, Relief, and Economic Security (CARES) Act funds. Previously, Mike managed the financial aspects of construction projects for federal entities, handling projects totaling nearly \$340 million across the United States. His responsibilities included developing financial reporting systems and enhancing financial accountability and compliance.

RELEVANT EXPERIENCE:

Nebraska Emergency Management Association (July 2024 - Present)

Mike served as a key member of the project leadership team responsible for assisting governmental and eligible non-profit entities expedite financial recovery and mitigation following COVID-19 through the FEMA Public Assistance (PA) Program and State of Nebraska's CARES Act on behalf of the Nebraska Emergency Management Association (NEMA). In this role, he assisted with the development of the State of Nebraska's CARES Act and FEMA PA funding disbursement process and supervised the strategy, design, and implementation. He also managed applicants who were eligible to apply for FEMA PA (federal funds) for costs associated with COVID-19 from start to finish of the grant process. He completed final payment and data approvals of all FEMA and Nebraska CARES Act claims prior to state approval and responsible for the weekly payment file, which is distributed to the state in order to pay all FEMA PA and Nebraska CARES Act claims totaling over \$300M.

California Resource Corporation (March 2025 – June 2025)

Mike served as a key member of project leadership team responsible for reviewing policies and procedures for compliance with Department of Energy Office of Fossil Energy and Carbon Management (FECM) Regional Direct Air Capture Hubs grant (DE-FOA-0002735) and Carbon Storage Validation and Testing grant (DE-FOA-0002711). He established a comprehensive regulatory framework that clearly defined the requirements necessary for compliance with grant program guidelines. In this role, Mike also developed a comprehensive compliance gap assessment, outlining the required updates to facilitate adherence to federal grant regulations.

Large Semi-conductor Manufacturer (July 2024 – August 2024)

Mike served as a key member of project leadership team responsible development of the clients CHIPS Act Application with Department of Commerce National Institute of Standards and Technology (NIST) for the CHIPS Incentives Program – Commercial Fabrication (2023-NIST-CHIPS-CFF-01). Mike managed day-to-day project activities across multiple

workstreams and practice groups, including site selection/incentives, subject matter experts, and CHIPS Grant application. He served as primary client POC for coordination and development of grant application. The grant application was for funding more than \$1B. The final submission exceeded 200 pages and encompassed incentives, applicant profiles, economic security alignment, financial information, project technical feasibility, workforce development plans, and broader impacts.

Nebraska Department of Health and Human Services (October 2021 – September 2023)

Mike served as a key member of project leadership team responsible for upstanding and administering the Childcare Stabilization Program funded through the American Rescue Plan Act (ARPA). During this role, Mike was responsible for maintaining project plan/task tracker for different iterations of the grant process, providing project reviews are being completed, coordinating with cross functional team, and handling escalated calls from the call center. He compiled quarterly ARPA grant obligation report for the state and coordinated with the ServiceNow technology team to set up application portal that meets all the ARPA requirements within 6 weeks.

5.3 Staff 3 Labor Category Resumes

Shayne Davis, Project Support



Labor Category: Staff 3

Task Alignment: 6

Years of Experience: 10+

 **NC Connection**

Worked with the North Carolina Office of Recovery and Resiliency (NCORR)

EDUCATION:

- The University of Southern Mississippi, Master of Public Accounting
- The University of Southern Mississippi, B.S. Business Administration and Accounting,

CERTIFICATIONS:

- Project Management Professional (PMP)

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Disaster Recovery
- Grant Management

BACKGROUND & QUALIFICATIONS:

Shayne Davis is a Senior Disaster Recovery Grant Consultant with 10 years of experience working with Community Development Block Grant Disaster Recovery (CDBG-DR), Community Development Block Grant Mitigation (CDBG-MIT), Social Services Block Grant (SSBG), CARES Act, and the American Rescue Plan (ARPA) funding to assist governments with managing more than \$1B in federal funding.

RELEVANT EXPERIENCE:

Florida Division of Emergency Management (January 2024 – Current)

Serving as Grant Manager Specialist working closely with Public Assistance applicants to deliver technical assistance on behalf of FDEM, Shayne has identified areas to grow reporting and create new reporting tools.

States of Delaware, Iowa, and Kansas (July 2022 – Dec 2023)

Served as Program Manager for the Homeowner Assistance Fund (HAF) and Emergency Rental Assistance (ERA) programs. Shayne managed multiple teams simultaneously, ranging from 6 to 45 members; developed project budgets, tracked burn rates, and identified and led discussions with clients for change orders.

State of North Carolina (Feb 2021 – July 2022)

As the Single-Family Homeowner Program Manager, Shayne aided the North Carolina Office of Recovery & Resiliency (NCORR) in awarding over \$260 million to more than 2,700 storm survivors, with 85% of recipients being Low to Moderate income; led a team of over one hundred members to process applications through eligibility, inspections, awards, appeals, and Uniform Relocation Assistance. Additionally, he provided strategic support with reporting, tracking, and buildout of the system of record. Shayne’s insight and analytical skills of data enabled him to provide data-backed recommendations to the client when policy and process efficiency opportunities were identified.

State of New York (Jan 2015 – Dec 2020)

As the Single-Family Homeowner Program Manager, Shayne aided the Housing and Community Renewal (previously the Governor’s Office of Storm Recovery) oversee case management and construction teams that distributed more than \$630 million to more than 5,800 disaster survivors of Super Storm Sandy, Hurricane Lee, and Hurricane Irene. Shayne also utilized data to identify program and policy efficiencies, finding solutions to difficult situations presented.

Eleanor Thompson, Project Support



Labor Category: Staff 3

Task Alignment: 8

Years of Experience: 8+

NC Connection

Served North Carolina DEQ at Deloitte. Previously worked and lived in North Carolina as a Teach for America teacher. Has family and loved ones impacted by Hurricane Helene.

EDUCATION:

- MPP, George Washington University, Honors
- BAS, Political Science, University of Pennsylvania, Honors

CERTIFICATIONS:

- ASU Certificate in ESG & Sustainability in Business

AREAS OF SPECIALIZATION:

- Program Evaluation
- Performance Measurement and Improvement
- Program Management
- Energy Policy & Regulation
- Sustainability Strategy and Implementation
- Stakeholder Engagement

BACKGROUND & QUALIFICATIONS:

Eleanor Thompson is a sustainability and program evaluation specialist with extensive experience leading program design for performance monitoring and evaluation initiatives at the state and local level. She excels in developing evaluation frameworks, criteria, and guidance for stakeholders to meet federal agency requirements, and brings a strong background in resilience and sustainability, supporting organizations to advance effective, evidence-based program management.

RELEVANT EXPERIENCE:

New York State Energy Research and Development Authority (NYSERDA), Integrated Energy Data Resource (IEDR) Program (March-September 2025)

Served as Governance Team Lead supporting Deloitte’s program management for NYSEDA’s IEDR initiative. Eleanor developed program-specific timelines, milestone tracking tools, and progress reporting templates to monitor project advancement and drive stakeholder alignment. She implemented performance metric tracking systems and compliance monitoring tools, maintained RAID logs and program budgets, and authored evaluation-driven stakeholder communications. Eleanor’s approach fostered continuous improvement and transparent reporting throughout all program stages.

North Carolina Department of Environmental Quality (April-December 2024)

Served as Project Team Lead for North Carolina’s DOE Home Efficiency Rebates Program. Eleanor designed and managed project timelines and milestone tracking systems, coordinated cross-programmatic reporting, and developed compliance monitoring tools for utility data integration. She led the standardization of program plans and reporting templates, contributing to a \$200M+ federal funding win and advancing rigorous performance evaluation.

Southern California Edison (Feb-April 2024)

Led Community Benefit Plan (CBP) design for a DOE funding initiative, establishing program management processes including progress reporting templates and milestone tracking systems. Eleanor supported application development by implementing performance metric tracking and compliance monitoring frameworks for grid modernization projects.

U.S. Government Accountability Office (GAO), Program Evaluation Division (September 2020 - January 2021)

Served in the Program Evaluation Division, collaborating to strengthen program evaluation practices across government programs. Eleanor developed documents such as GAO’s “Program Evaluation: Key Terms and Concepts” guidance (GAO-21-404SP), drafting foundational content that

defined core evaluation terms, clarified evaluation types, and outlined criteria for assessing program effectiveness and efficiency. She worked with subject matter experts to develop practical frameworks for logic models, process and outcome evaluations, and evidence standards, supporting agencies in designing, implementing, and interpreting evaluations. Eleanor's work helped federal programs adopt consistent evaluation approaches, improve the rigor of performance measurement, and enhance decision-making based on reliable evidence.

David Wright, Project Support



Labor Category: Staff 3

Task Alignment: 8

Years of Experience:

EDUCATION:

- Bachelor of Arts, Government, University of Texas at Austin

CERTIFICATIONS:

- Certified Grants Management Specialist (CGMS)

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Monitoring
- Financial Management
- Audit Readiness
- Technical Assistance
- Closeout Readiness
- Disaster Recovery
- Grant Management

BACKGROUND & QUALIFICATIONS:

David Wright is an experienced grants management professional with a strong background in compliance and risk management across the grant life cycle. He has supported state and local government large-scale grant programs in navigating complex regulatory environments. David’s experience includes 2 CFR 200 compliance, grant administration, compliance audits, and closeout readiness. He has led multidisciplinary teams in conducting monitoring visits, managing grant transactions, and delivering technical assistance training. He is recognized for his proficiency in project management, regulatory compliance, and developing the industry leading practices that enhance program success and operational efficiency.

RELEVANT EXPERIENCE:

Pennsylvania, Department of Education (July 2023 – June 2025)

Oversaw monitoring reviews for school districts receiving a total of \$8+ Billion funded by the Elementary and Secondary School Emergency Relief (ESSER) Fund and the Coronavirus Aid, Relief, and Economic Security (CARES) Act. Key activities included compliance reviews, audit readiness support, technical assistance training, and closeout support. Developed and delivered Final Results letters to clients and subrecipients, identified and communicated compliance gaps, and facilitated technical assistance training on 2 CFR 200 compliance and industry leading practices, strengthening grant management processes, and supporting successful program closeout.

Wyoming, Department of Health and Human Services (June 2022 – June 2023)

Supported the State of Wyoming in administering the Emergency Rental Assistance Program (ERAP), helping to disburse over \$105 million in relief funds to citizens while upholding strict program compliance and achieving on-time disbursements. Managed a critical stage in the application process, resolving compliance violations and determining application readiness to complete timely and accurate fund distribution. Generated daily reports to be presented to key stakeholders, providing clear insights into program status and progress.

Nebraska, Department of Health and Human Services (August 2021 – May 2022)

Supported Nebraska DHHS in administering the Emergency Rental Assistance Program (ERAP), conducting QA/QC on 67,000+ applications and helping deliver \$100M in COVID-19 relief. Facilitated program compliance, mitigated risk through rigorous reviews, and monitored fund disbursement. Maintained accurate documentation, supported closeout readiness, and upheld grant management and disaster recovery standards throughout the project lifecycle.

5.4 Staff 2 Labor Category Resumes

Brendan Saunders, Project Support



Labor Category: Staff 2

Task Alignment: 6

Years of Experience: 20+

EDUCATION:

- Master of Arts, Urban Planning and Policy, University of Illinois at Chicago
- Bachelor of Arts, Social Work, Wartburg College

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Disaster Recovery
- Grant Management

BACKGROUND & QUALIFICATIONS:

Brendan Saunders is a seasoned policy leader and Fair Housing advocate with 20+ years of experience in strategic planning, federal grant management (CDBG, CARES Act, HOME ARP, ESG, FHIP), and advancing equitable housing outcomes. He co-led a \$12.5M, 5-year plan for Racine to expand fair housing, administered \$450K in COVID-19 relief, and created a \$217K rental assistance program. Brendan’s data-driven, evidence-based approach and emotional agility enable him to design efficient systems and foster community collaboration, linking stable housing to individual and community success, especially during crises like the COVID-19 pandemic.

RELEVANT EXPERIENCE:

St. Louis County, Missouri (June 2025 – Present)

Review program and expense processes, assess supporting documentation, and maintain accurate grant records. Conduct comprehensive risk and compliance reviews to identify and mitigate potential issues. Prepare final closeout packages, to align documentation and procedures with federal reporting requirements to streamline the grant-closure process. These efforts prepare the County’s compliance and audit readiness, positioning St. Louis County for successful audits and enhanced public trust.

Commonwealth of Pennsylvania, Department of Education (February 2024 – May 2025)

Oversaw monitoring and compliance for \$8+ billion in ESSER and CARES Act funding, collaborating with school districts to review contracts, procurement, and 2 CFR 200 compliance. Provided audit readiness support, technical assistance on federal financial rules, identified compliance gaps, and supported successful program closeout.

City of Racine, Wisconsin (August 2016 – August 2024)

Managed compliance and federal reporting for \$1.7M in HUD grants (CDBG, ESG, HOME), including budget amendments and extensions. Monitored Davis-Bacon Wage and Section 3 compliance and facilitated hiring of low-income individuals and businesses. Enabled Micro Enterprise Revolving Loan funds by organizing a Fair Lending Summit with 70+ banks. Collaborated on affordable housing initiatives with community partners. Created Racine’s first Fair Housing brochure and co-developed two 5-year strategic nonprofit plans. Recognized with the 2019 Relentless Optimism Award for impactful community education and support of low-income households. Maintained a strong funding pipeline and maintained regulatory compliance.

Hugh Vu, Project Support



Labor Category: Staff 2

Task Alignment: 13

Years of Experience: 5+

EDUCATION:

- Bachelor of Arts, Economics, University of Texas at Austin

AREAS OF SPECIALIZATION:

- Compliance
- Risk Mitigation
- Grant Management

BACKGROUND & QUALIFICATIONS:

Hugh is a solutions consultant with 5+ years of experience with grant management and program implementation for CDBG-DR funded housing programs as a vendor at the state level. His focus has been on compliance, program management, and review of Eligibility, Duplication of Benefits, Relocation, Construction Oversight, Contractor Payment Disbursement, and Closeout for these housing programs. His concentration on Quality Assurance/ Quality Control and Reporting has allowed him to facilitate overall program health and regulatory compliance with federal and state guidelines and regulations.

RELEVANT EXPERIENCE:

State of Florida – Florida Department of Emergency Management (FDEM) – Elevate Florida (January 2025 – Present):

Hugh provides direct technical assistance to local governments and private non-profit organizations participating in the FEMA Public Assistance Program in response to Hurricane Helene and Milton recovery efforts. Drawing on his experience in disaster recovery and federal grant compliance, he assists applicants with developing comprehensive damage inventories and formulating project scopes to deliver accurate and timely submissions. Hugh also supports applicants throughout the reimbursement process, guiding them through compliance requirements and conducting thorough closeout reviews.

State of North Carolina – North Carolina Department of Environmental Quality (September 2024 – December 2024):

Hugh supported the development and drafting of a strategic grants roadmap to help the department navigate funding opportunities available through the Bipartisan Infrastructure Law (BIL) and Inflation Reduction Act (IRA). He conducted discovery interviews with various DEQ divisions to analyze current grant-related operations and performed targeted research to identify and align BIL and IRA funding opportunities with divisions. Additionally, Hugh contributed to the development of leading practices for the Office of Continuous Improvement’s grant application support strategy and played an active role in preparing weekly client status update meetings and reports.

State of North Carolina – North Carolina Department of Transportation (August 2024):

Contributed to the drafting and strategic development of NCDOT’s application for the Bipartisan Infrastructure Law’s (BIL) Charging Fueling & Infrastructure (CFI) grant. He developed application content focused on the safety, accessibility, sustainability, and resilience of proposed electric vehicle chargers in western North Carolina. Hugh also performed an equity analysis of the target region using the Climate & Economic Justice Screening Tool (CEJST) to address Justice40 initiatives and utilized the

Alternative Fuel Life-Cycle Environmental and Economic Transportation (AFLEET) tool to analyze potential pollution reduction impacts. Additionally, he supported weekly meetings with both the client and external partners to facilitate collaboration and project progress.

GrantWorks, Inc. – Project Manager (March 2019 – July 2024):

Hugh led the administration of CDBG-DR funded recovery programs supporting homeowners impacted by Hurricane Harvey and the 2019 Rio Grande Valley Flood. He managed all aspects of program delivery, from application eligibility and duplication of benefits review to environmental compliance, budget management, and construction oversight for single-family home rebuilding efforts across Texas. Hugh coordinated closely with builders and clients to streamline contractor payments and support compliance with construction and resiliency standards. He produced detailed program health reports, conducted audits during closeout to confirm regulatory adherence, and developed internal processes and tracking tools to enhance project management efficiency. Additionally, Hugh spearheaded marketing and outreach initiatives, created promotional materials, and facilitated onboarding and training for new project managers, confirming effective program execution and stakeholder engagement.

Adam Feeley, Project Support



Labor Category: Staff 2

Task Alignment: 12

Years of Experience: 3+

EDUCATION:

- Bachelor of Arts, Public Policy and Political Science, University of Denver

AREAS OF SPECIALIZATION:

- Financial Management
- Technical Assistance
- Closeout Readiness
- Grant Management
- Grant Monitoring

BACKGROUND & QUALIFICATIONS:

Adam is a grants management professional with experience supporting state agencies in administering federally funded programs. His work centers on developing operating procedures, financial oversight, and program monitoring to strengthen compliance and efficiency. Adam has experience providing technical assistance, training, and capacity building for subrecipients and teams, focusing on documentation, communication, and project delivery. His attention to process improvement and reporting has helped drive successful program outcomes and meet federal and state requirements.

RELEVANT EXPERIENCE:

Pennsylvania Department of Education (PDE) ESSER Grant Technical Assistance Team (December 2024–June 2025)

Provided technical assistance to grant subrecipients, focusing on strengthening grant management practices and maintaining compliance with federal requirements. Led the development and implementation of standard operating procedures and documentation protocols, which improved consistency and efficiency across key workflows. Designed and facilitated targeted action plans for high-risk subrecipients, helping to mitigate compliance risks and enhance overall program performance. Supported the creation of monitoring tools, such as closeout checklists and assessment trackers, to improve oversight and reporting. Delivered training and capacity-building sessions to equip subrecipients with up-to-date guidance and industry leading practices.

Oregon Health Authority (OHA) FEMA Grants Team (November 2022–November 2024)

Supported the creation and submission of FEMA PA packages for COVID-19 FEMA grant relief, helping the State of Oregon in securing substantial reimbursements. Led the review and validation of claims and supporting documentation to determine eligibility and adherence to federal guidelines. Coordinated outreach and communication with over 140 facilities, facilitating the collection of third-party documentation and maintaining accurate records. Developed standardized procedures and tools for project delivery, including tracking platforms to monitor progress and compliance.

5.5 Staff 1 Labor Category Resumes

Madison Moreau, Project Support



Labor Category: Staff 1

Task Alignment: 2

Years of Experience: 2+

EDUCATION:

- Louisiana State University, B.S. Finance

AREAS OF SPECIALIZATION:

- Grant Management
- Compliance
- Grant Writing
- Financial Management

BACKGROUND & QUALIFICATIONS:

Madison is an analyst specializing in grants and strategic planning. She assists with financing, researching, and planning infrastructure projects across energy and broadband sectors.

RELEVANT EXPERIENCE:

State of Arkansas, Department of Finance & Administration (*August 2024 - Present*):

Madison works with the Arkansas Secretary of Infrastructure to manage grant research, application coordination, and grant writing. She conducts comprehensive research and analysis of Funding Opportunity Announcements (FOAs), providing detailed summaries for the team and client. Madison is trained to co-lead biweekly client calls to discuss FOA updates, project releases, and the internal funding application pipeline, enhancing client communication and project alignment. She built a repository of previous awards that the state has won in the past for programs that currently align with the entity’s priorities. Maddison performs research and various ad-hoc tasks, providing high-quality deliverables. She assists in creating presentation slides summarizing findings, which are utilized in client meetings, enhancing client understanding and driving informed discussions.

Government of Puerto Rico (*June 2023 - August 2023*):

Madison served on a team that assisted the Puerto Rico Fiscal Agency and Financial Advisory Authority (AAFAF) with the financial management, monitoring of subrecipients for compliance with statutory, regulatory, and programmatic requirements, and closeout support for the Coronavirus Relief Fund (CRF) allocated to Puerto Rico for COVID-19. She reviewed Hurricane Maria disaster relief transactions worth \$1.9 million for federal funds and redacted confidential documents for ARPA programs.

Pennsylvania Department of Education (*June 2023 - August 2023*):

Madison served on a team that assisted in delivering Elementary and Secondary School Emergency Relief (ESSER) grant compliance monitoring and closeout support services for over 800 grant subrecipients. She assisted in subgrant recipient monitoring for the Department of Education in Pennsylvania.

Madison Stone, Project Support



Labor Category: Staff 1

Task Alignment: 4

Years of Experience: 3+

EDUCATION: Bachelor of Science in Business Administration, Troy University

AREAS OF SPECIALIZATION:

- Grant Management
- Grant Monitoring
- Technical Assistance
- Closeout Readiness

BACKGROUND & QUALIFICATIONS:

Madison is a dedicated grants and project management professional with a strong focus on compliance and process improvement. She has effectively managed various funding programs, facilitating adherence to regulatory requirements. With a background in coordinating departmental efforts and liaising with stakeholders, she excels in overseeing project lifecycles and maintaining thorough documentation. She is committed to driving successful grant administration and fostering collaborative relationships.

RELEVANT EXPERIENCE:

FEMA Public Assistance Grant (January 2025 – Present):

Supported the Division of Emergency Management with FEMA Public Assistance (PA) Grant funding, providing technical assistance to subrecipients, including guidance on eligibility, documentation, and compliance with federal regulations (2 CFR 200).

Infrastructure Investment and Jobs Act (IIJA) and the Inflation Reduction Act (IRA) Grants (May 2024 - January 2025):

Supported the Office of the Secretary of Infrastructure with the management of the state's infrastructure grants, facilitated departmental coordination, conducted research on funding opportunities, and managed multiple grant programs under development by the state. Oversaw pre- and post-award grants administration, maintaining compliance with 2 CFR 200 and federal requirements. Enhanced grant processes through data analytics and strategic planning. Collaborated with internal teams and stakeholders to achieve objectives.)

Hazard Mitigation Grant Program (October 2022 - May 2024):

Managed the full lifecycle of federal and state grants for the Hazard Mitigation Grant Program (HMGP) with the State's Division of Emergency Management. Responsible for 16 active Hurricane Michael projects and 14 Hurricane Ian applications. Acted as primary liaison between the State's Division of Emergency Management and grant recipients/applicants. Maintained documentation and prepared reports for regulatory compliance.

5.6 Administrative Labor Category Resumes

Belqis Rahim, Project Support



Labor Category:
Administrative

Task Alignment: 10

Years of Experience: 2+

EDUCATION:

- University of Pittsburgh, Bachelor of Arts in Economics

AREAS OF SPECIALIZATION:

- Grant Management
- Compliance
- Grant Monitoring

BACKGROUND & QUALIFICATIONS:

Belqis is a Solution Analyst in Grant Management. She is experienced in facilitating grant compliance and presenting insights for improved fund utilization.

RELEVANT EXPERIENCE:

State of Arkansas, Department of Finance & Administration (July 2025 - Present):

Belqis served as a member of the Project Management Office (PMO) for the State of Arkansas IJA project, where she is responsible for creating comprehensive weekly and monthly reports to track project progress and key metrics. She manages hour reconciliation and prepares accurate invoices to maintain proper billing and financial oversight.

Pennsylvania Department of Education (August 2022 - June 2025):

Belqis served as a member of the Pennsylvania Department of Education's ESSER project, where she was responsible for monitoring grant recipients to maintain compliance with funding requirements and proper utilization of allocated resources. In this role, she analyzed complex data sets to support decision-making, monitored federal grant recipients following the Covid-19 pandemic, and presented findings and recommendations to grant recipients, highlighting areas for improvement in fund utilization and compliance.

Raymonde Garcia, Project Support (AG Witt)



Labor Category: Admin

Task Alignment: 11

Years of Experience: 4+

EDUCATION:

- Florida State University, Bachelor of Applied Science in Sociology and Psychology

AREAS OF SPECIALIZATION:

- Technical Assistance
- Grant Management
- Compliance
- Grant Monitoring

BACKGROUND & QUALIFICATIONS:

Raymonde Garcia is an administrative professional with experience in community outreach and case management. She has four years of experience assisting applicants with various Federal and State programs. Her academic work focused on social work, and she applies that to creating meaningful connections with the applicants she serves, it allows her to tailor her approach to different and often underserved populations. Raymonde utilizes strong attention to detail to review documentation for accuracy, completeness, and adherence to regulations and standards.

RELEVANT EXPERIENCE:

State of North Carolina and Georgia (April 2021 - Present):

Raymonde provided technical assistance to applicants for federally funded grant programs relating to Housing, Small Business Support, Emergency Rental Assistance, and ARPA. She assisted with the preparation of grant application materials and reviewed documentation for correctness, completeness, and adherence to eligibility requirements. She conducted outreach to various potential applicants via phone, email, and computer platforms to ensure that the required documentation was provided within the specified timeframe.

Pulaski County, Arkansas (April 2021 - Present):

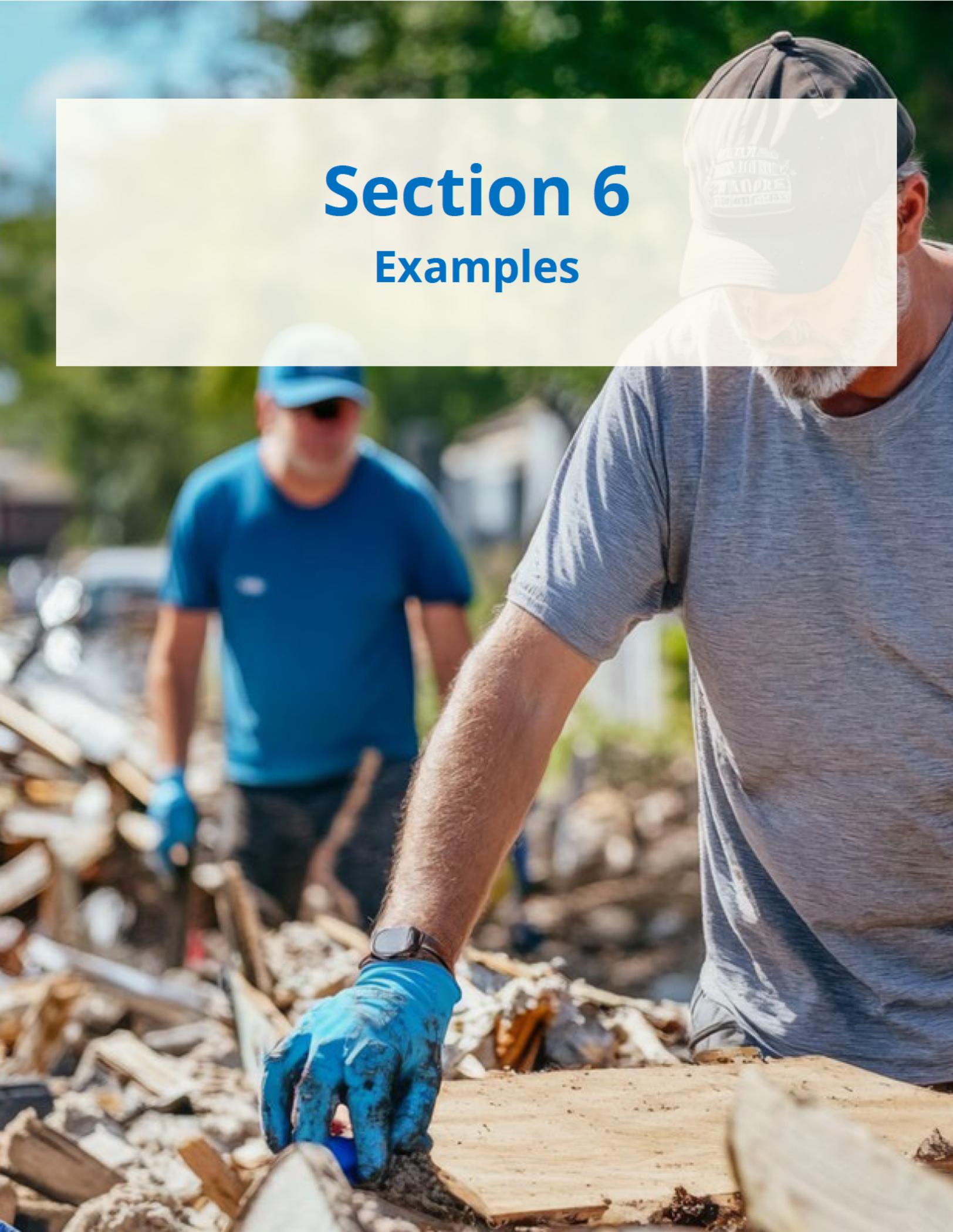
As Case Manager she reviewed documents and determined participant eligibility for federally subsidized and disaster response programs. She evaluated each application for completeness and adherence to the eligibility criteria established in regulations. She examined a variety of supporting documents and compared them to the information provided by applicants for completeness and correctness.

Emergency Rental Assistance Program (April 2021 – April 2023):

Raymonde served as a program review specialist, evaluating up to 20 applications daily for validity and compliance with eligibility criteria. She conducted outreach and follow-up with applicants to resolve issues and provide guidance. Additionally, she identified and denied fraudulent cases to maintain program integrity.

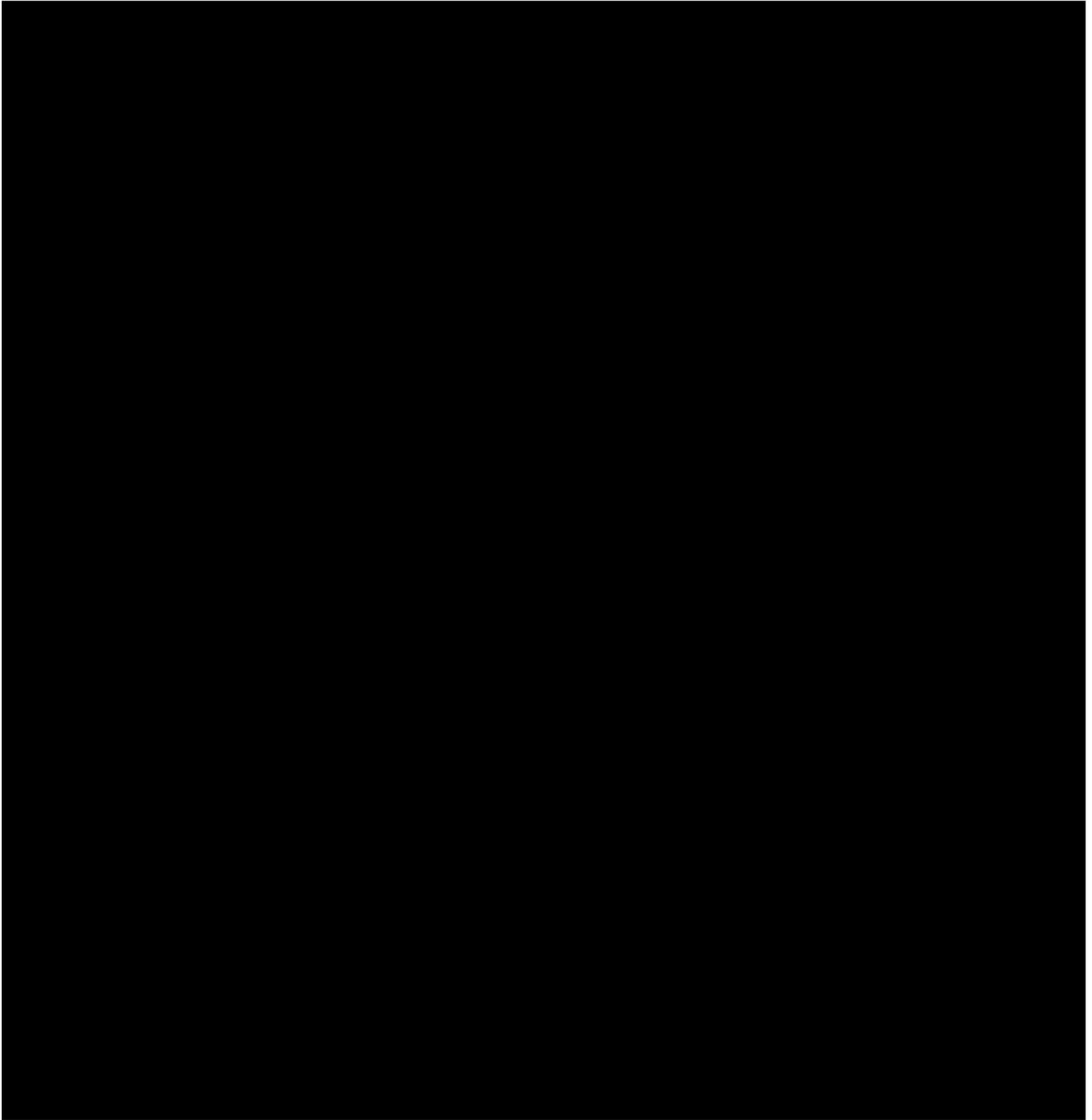
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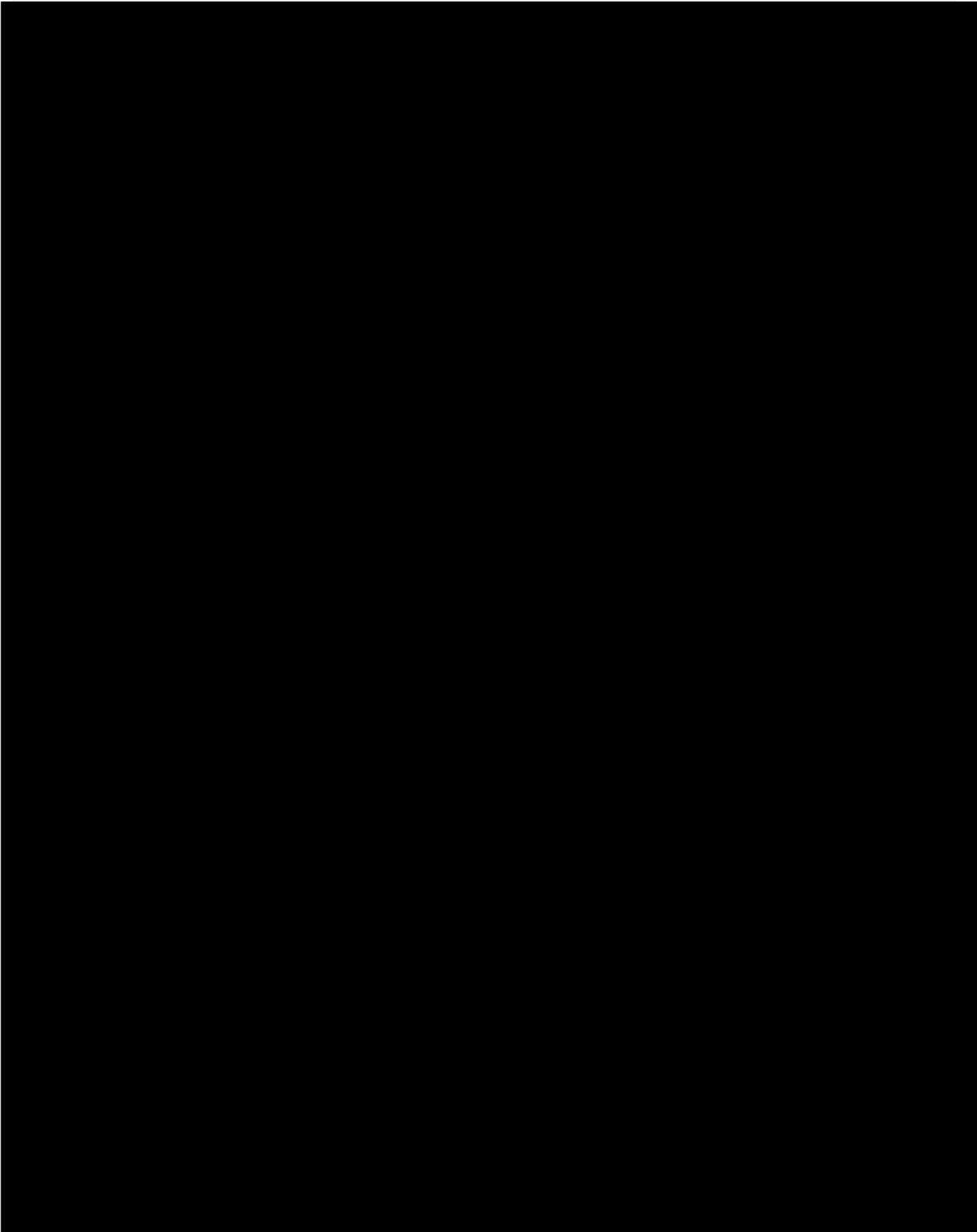
Examples

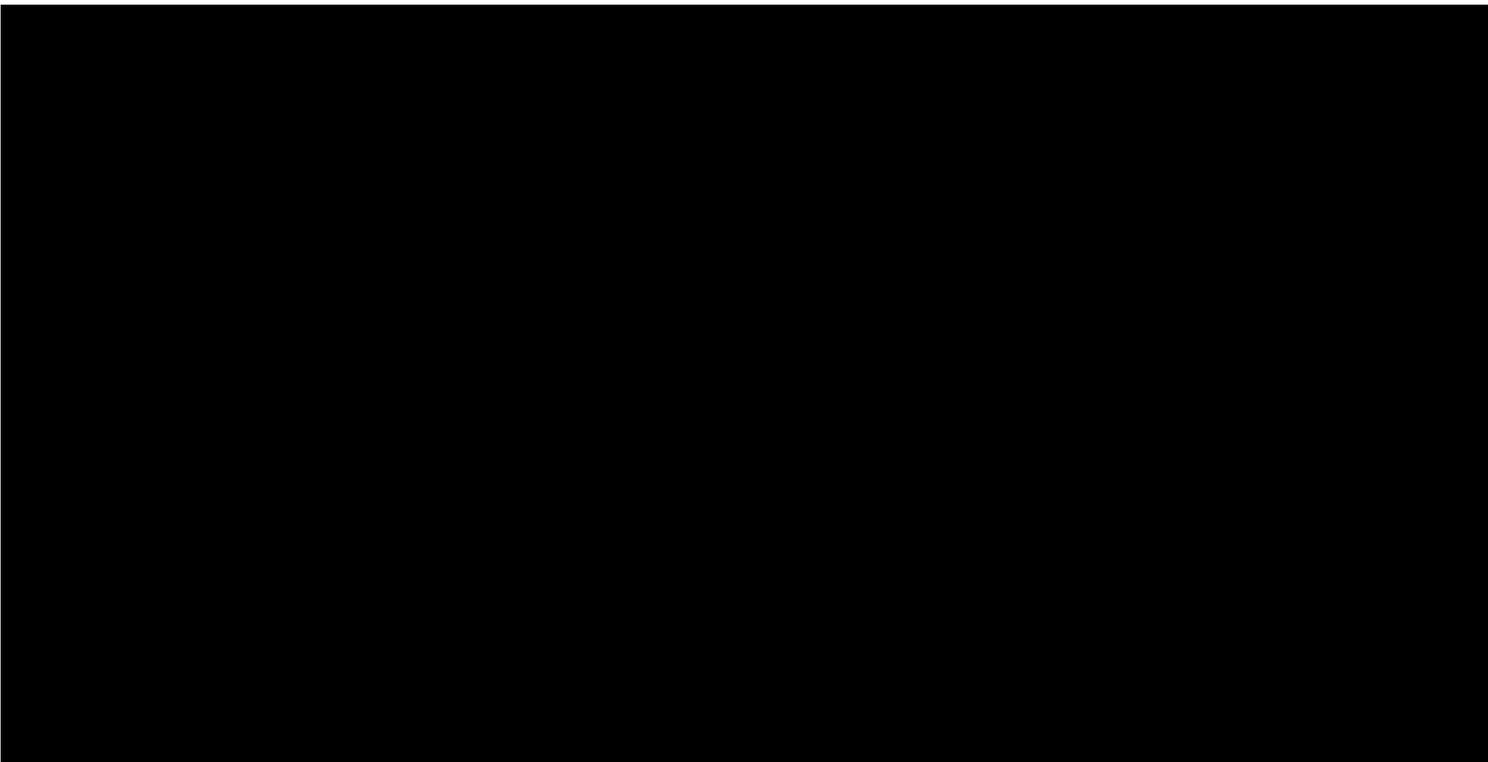


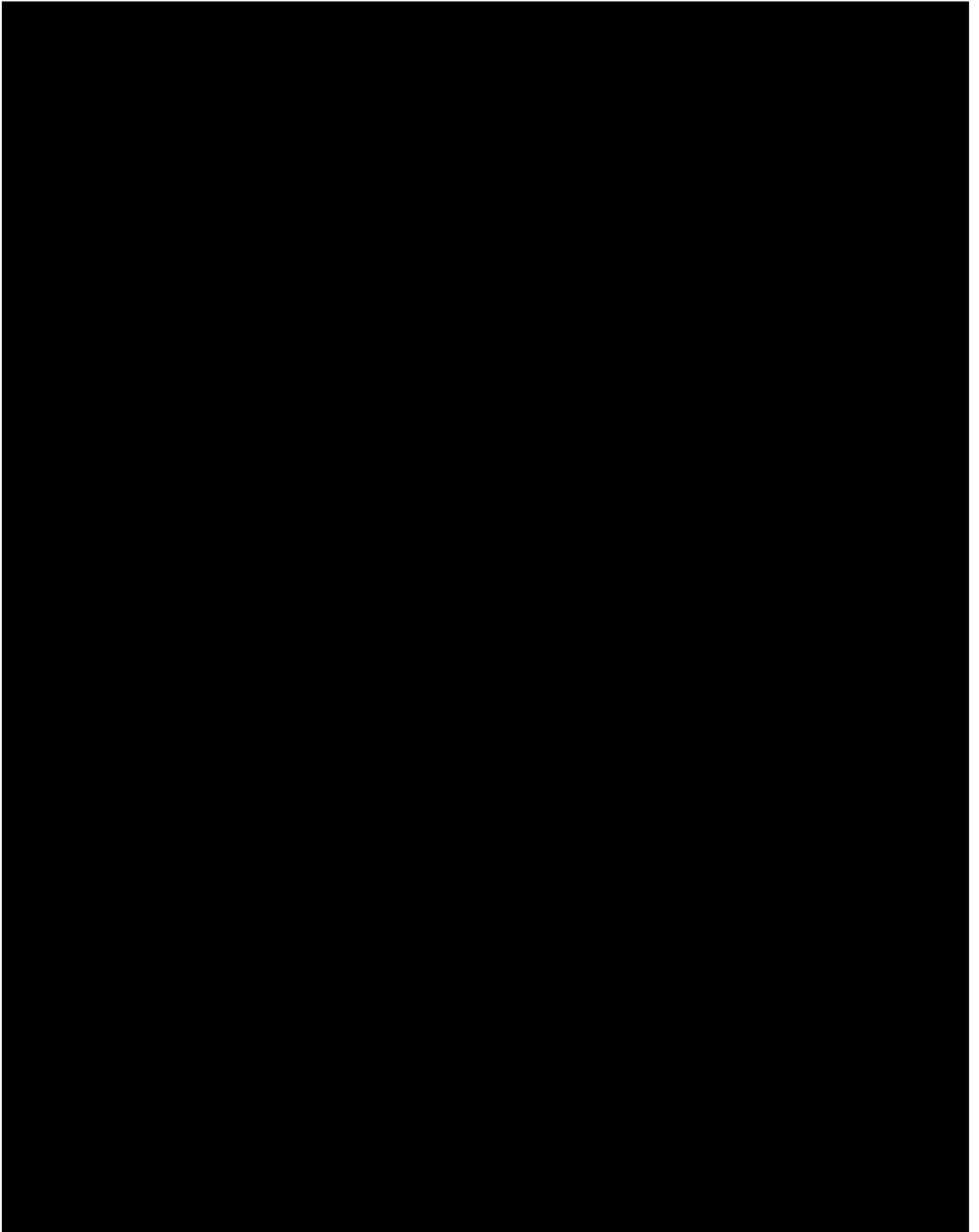
6.0 Examples (Attachment H)

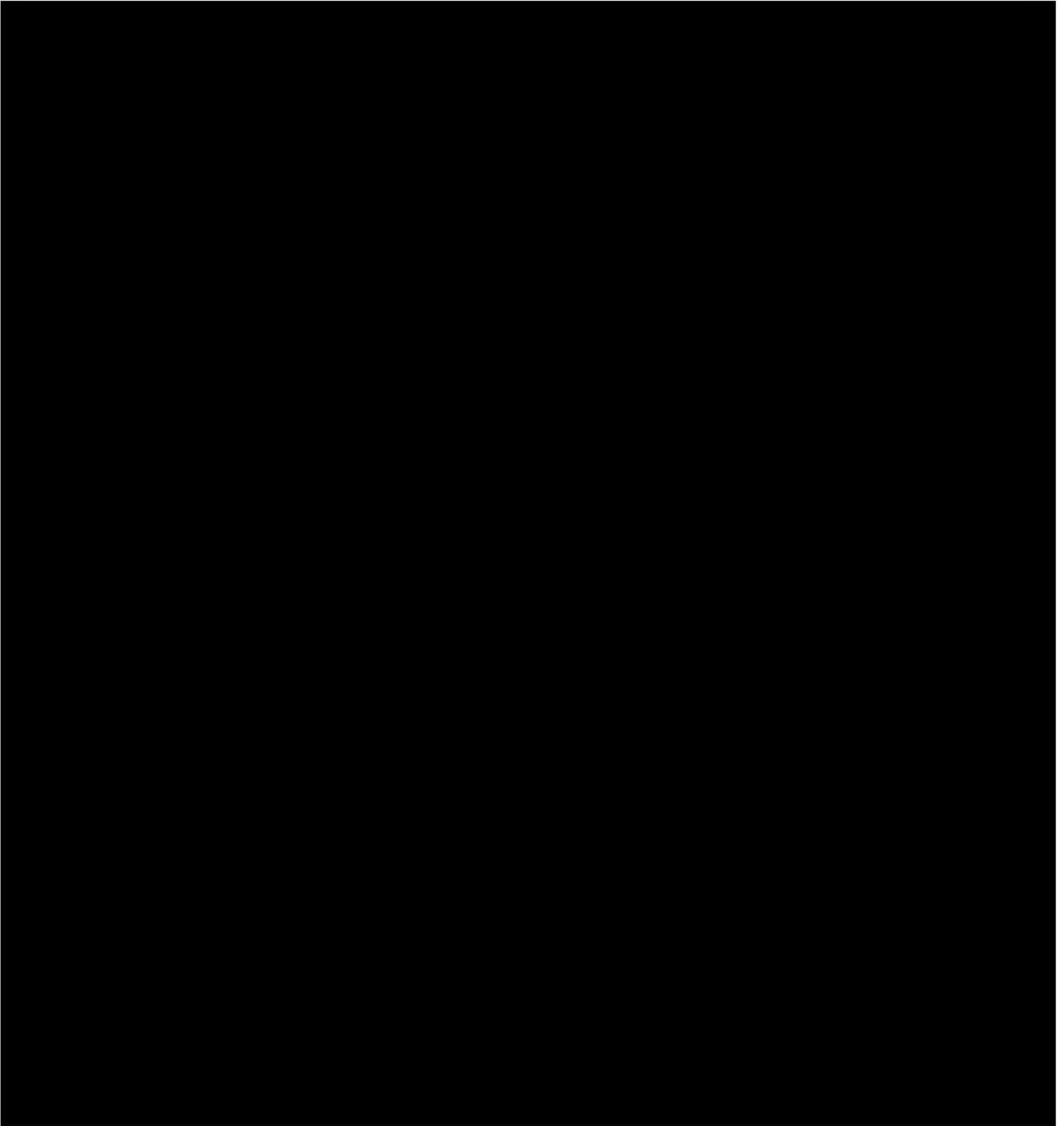
Deloitte is pleased to provide the following three examples in response to NC's request for at least three examples of projects of similar type and size performed within the last five years.

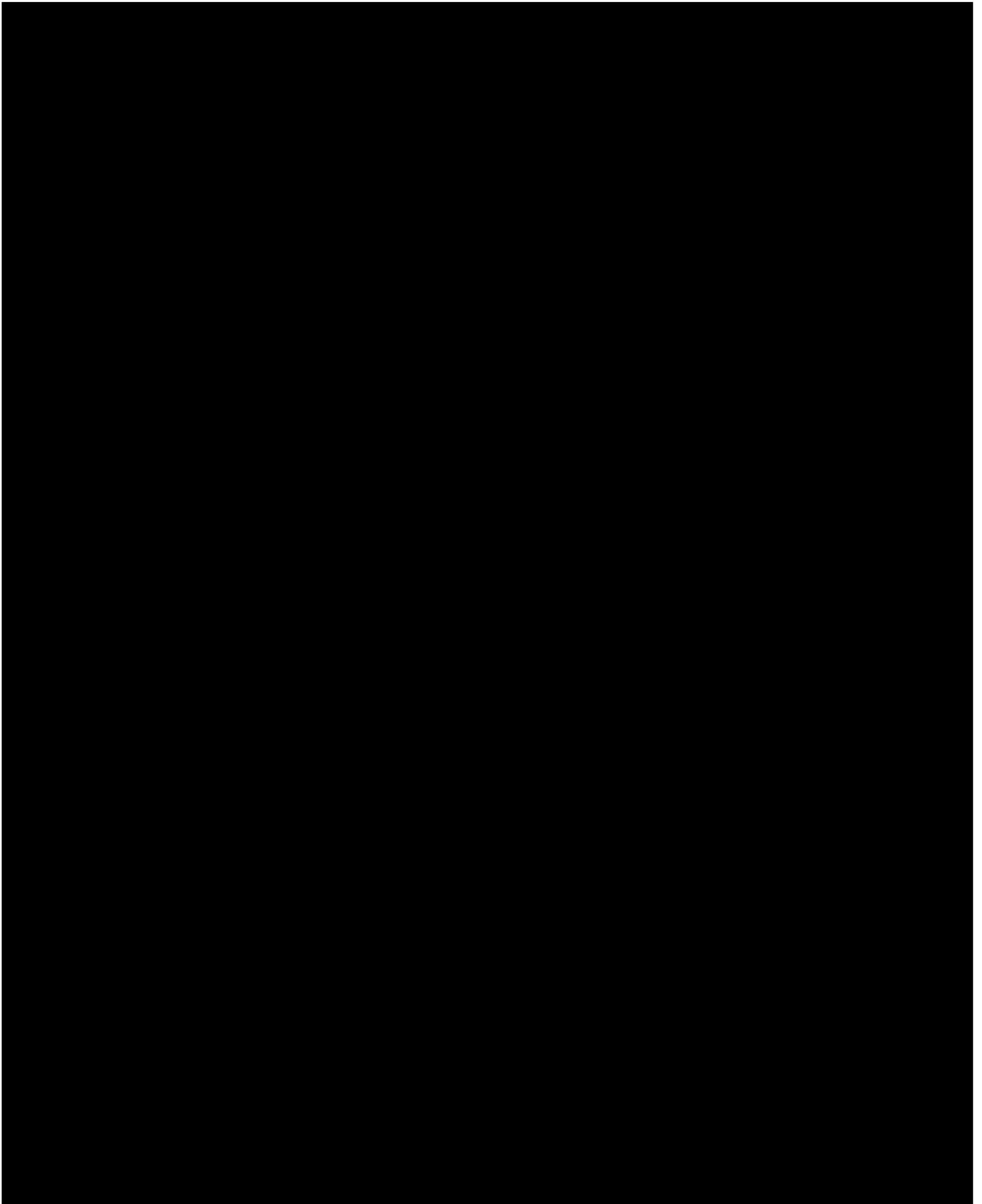


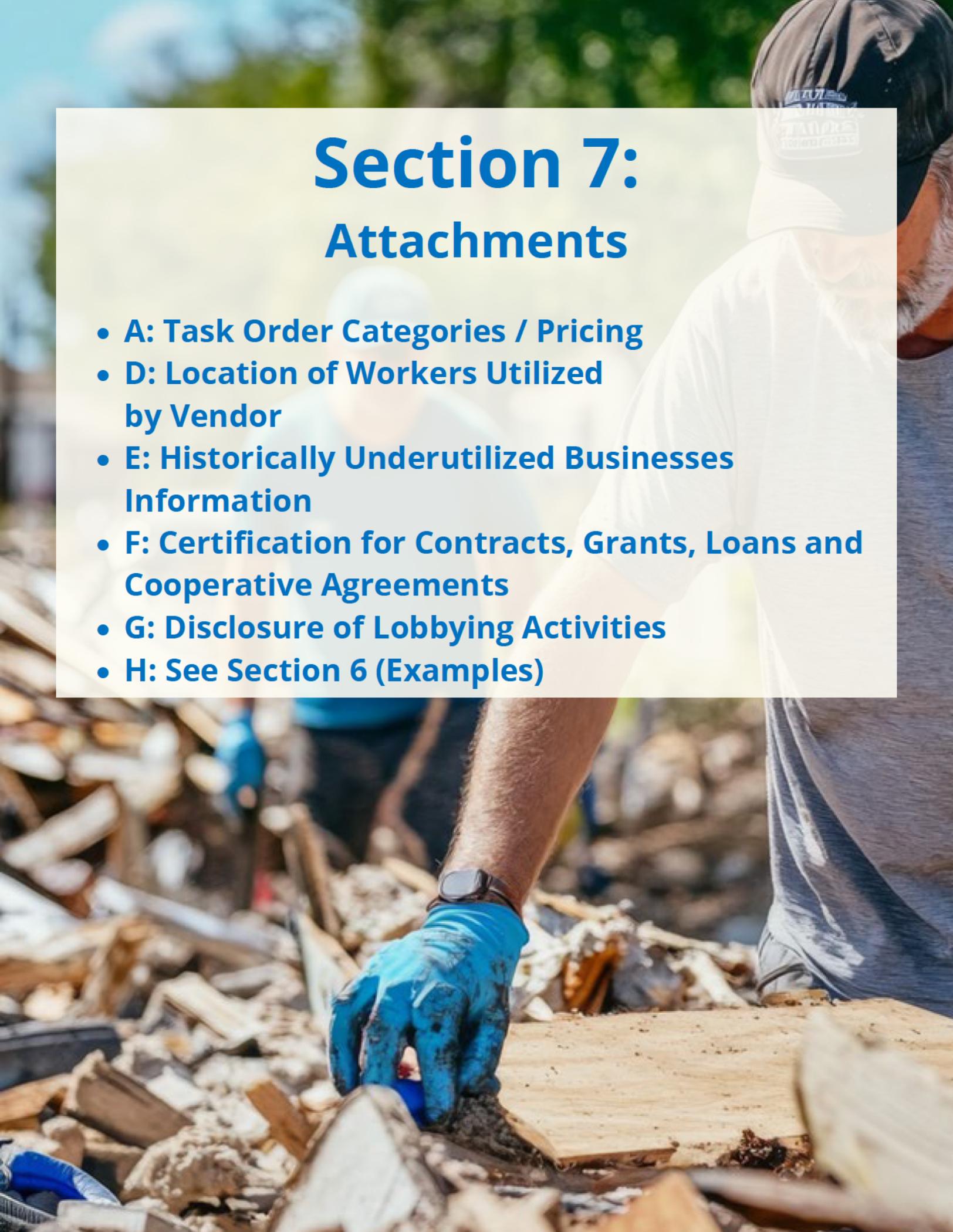












Section 7: Attachments

- **A: Task Order Categories / Pricing**
- **D: Location of Workers Utilized by Vendor**
- **E: Historically Underutilized Businesses Information**
- **F: Certification for Contracts, Grants, Loans and Cooperative Agreements**
- **G: Disclosure of Lobbying Activities**
- **H: See Section 6 (Examples)**

7.0 Attachments

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

Per RFP Section 5.1 GENERAL, SCOPE OF WORK, Vendors may choose to submit an offer for all task order categories or only certain categories. Indicate below which task order category(s) Vendor would like to perform work. While Vendors may choose which task order category(s), DCR makes no guarantee of task order award, volume of task orders Vendors will receive, or the task order types Vendors will receive. Task Orders will not be made outside of the task order category(s) selected by the Vendor during this solicitation process.

- YES NO TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
- YES NO TASK 2 – Financial Compliance, Oversight, and Fraud Prevention
- YES NO TASK 3 – Duplication of Benefits (DOB) Compliance
- YES NO TASK 4 – Procurement Compliance and Monitoring
- YES NO TASK 5 – Claims, Appeals, and Case Reviews
- YES NO TASK 6 – Action Plan Development and Amendments
- YES NO TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support
- YES NO TASK 8 – Program Performance Monitoring and Evaluation
- YES NO TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
- YES NO TASK 10 – Audit Readiness and Monitoring Support
- YES NO TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects
- YES NO TASK 12 – Training, Technical Assistance, and Capacity Building
- YES NO TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support
- YES NO TASK 14 – Communication, Public Information, and Outreach Support
- YES NO TASK 15 – Grant Management
- YES NO TASK 16 – Technical Systems Specification & Project Management
- YES NO TASK 17 – Environmental Review

PRICING:

Vendor to replicate the table below and provide an hourly not-to-exceed rate per position for each task order category(s) offered with its solicitation response. Rates shall be inclusive of salary, overhead, administrative and other similar fees, travel and other expenses. Vendor is responsible for providing cell phones, computers/laptops, and all IT support related thereto.

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288

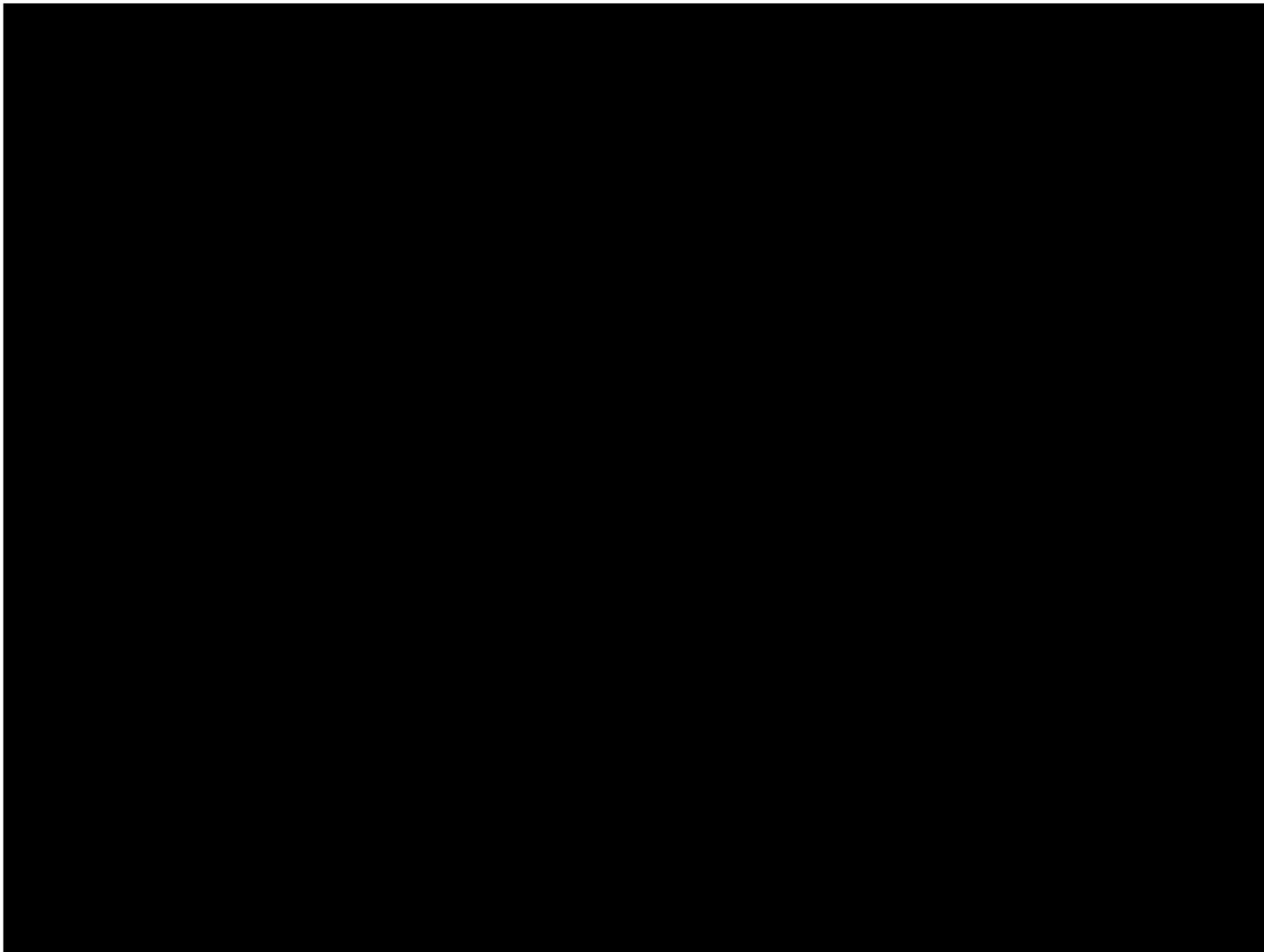
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193

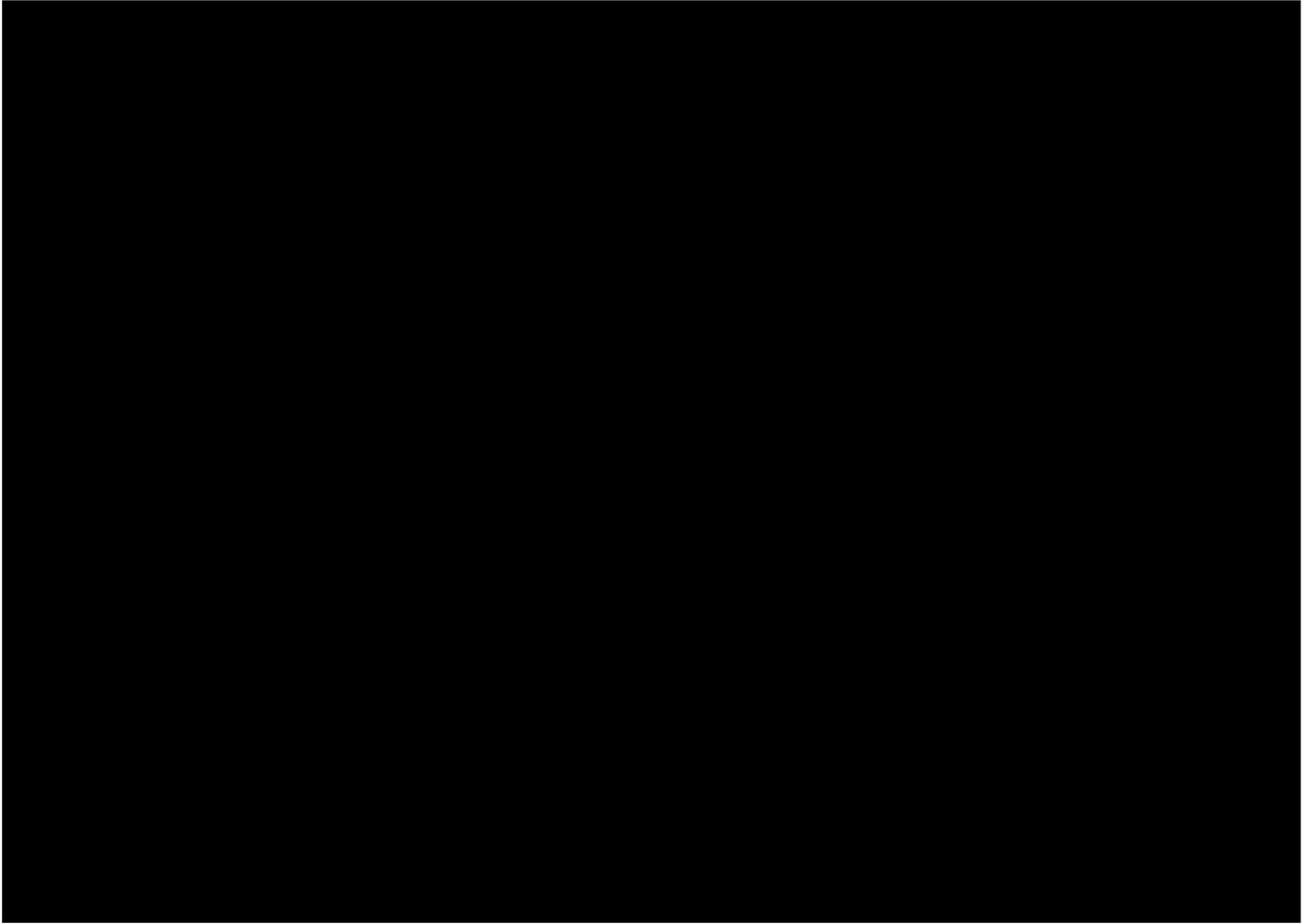
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 10 – Audit Readiness and Monitoring Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$28
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154

Admin	\$125	\$129	\$133
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133
TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Executive	\$342	\$353	\$363
Supervisor	\$271	\$280	\$288
Staff 3	\$215	\$222	\$229
Staff 2	\$181	\$187	\$193
Staff 1	\$145	\$150	\$154
Admin	\$125	\$129	\$133

TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt	\$8,500	\$8,755	\$9,018
Categorically Excluded Not Subject to §58.5	\$1,750	\$1,803	\$1,858
Categorically Excluded Subject to §58.5	\$3,500	\$3,605	\$3,714
Environmental Assessment	\$8,500	\$8,755	\$9,018
Environmental Impact Statements	\$500,000	\$515,000	\$530,450
Reevaluation Environmental Review:			
Exempt	\$6,800	\$7,004	\$7,215
Categorically Excluded Not Subject to §58.5	\$1,400	\$1,442	\$1,486
Categorically Excluded Subject to §58.5	\$2,800	\$2,884	\$2,971
Environmental Assessment	\$6,800	\$7,004	\$7,215
Environmental Impact Statements	\$200,000	\$206,000	\$212,180

*For Environmental Review provide a unit cost for each of the below levels of environmental review, as well as a unit cost for environmental review reevaluation.





ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR

In accordance with NC General Statute 143-59.4, the Vendor shall detail the location(s) at which performance will occur, as well as the manner in which it intends to utilize resources or workers outside of the United States in the performance of this Contract. The State will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award. Please complete items a, b, and c below.

a) Will any work under this Contract be performed outside the United States?

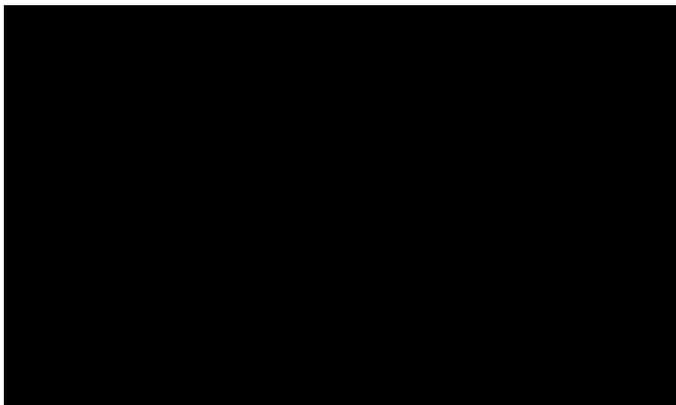


If the Vendor answered "YES" above, Vendor must complete items 1 and 2 below:

1. List the location(s) outside the United States where work under this Contract will be performed by the Vendor, any sub-Contractors, employees, or other persons performing work under the Contract:

Based on the scope of work, Deloitte may staff professionals in our Deloitte US firm who are located in one of seven offices in India (non-US resources). If non-US resources are considered for staffing, Deloitte will coordinate with DCR to obtain a mutual-agreement prior to staffing.

Deloitte's USI (U.S.-India) offices are located in India and serve as a strategic extension of Deloitte's U.S. operations, providing a range of services and support. The primary Deloitte USI office locations in India are:



...s service lines, including consulting, audit, tax, risk advisory, and more. The USI practice leverages highly trained talent and provides high-quality, cost-effective services to support Deloitte's U.S. clients and operation

2. Describe the corporate structure and location of corporate employees and activities of the Vendor, its affiliates or any other sub-Contractors that will perform work outside the U.S.:

Corporate Structure:





Activities Performed Outside the U.S.:

USI professionals deliver a broad range of services for U.S. clients, including:



All activities are conducted in accordance with Deloitte U.S. policies, U.S. regulatory requirements, and client confidentiality protocols.

b) The Vendor agrees to provide notice, in writing to the State, of the relocation of the Vendor, employees of the Vendor, sub-Contractors of the Vendor, or other persons performing services under the Contract outside of the United States

YES NO

NOTE: All Vendor or sub-Contractor personnel providing call or contact center services to the State of North Carolina under the Contract **shall** disclose to inbound callers the location from which the call or contact center services are being provided.

c) Identify all U.S. locations at which performance will occur:

Deloitte has offices throughout the United States in approximately every state. Given that the scope and timeline of the engagement have not yet been defined, we are unable to identify the specific U.S. office locations where performance will occur at this time. Upon receipt of the finalized scope statement for review and approval by the state, we will promptly provide a comprehensive list of all relevant office locations where project activities will be conducted.

ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION

The State is committed to retaining Vendors from diverse backgrounds, and it invites and encourages participation in the procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. In particular, the State encourages participation by Vendors certified by the State Office of Historically Underutilized Businesses, as well as the use of HUB-certified vendors as subcontractors on State contracts.

Historically Underutilized Businesses (HUBs) consist of minority, women and disabled business firms that are at least fifty-one percent owned and operated by an individual(s) of the categories. Also included in this category are disabled business enterprises and non-profit work centers for the blind and severely disabled.

Pursuant to G.S. 143B-1361(a), 143-48 and 143-128.4, the State invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. This includes utilizing subcontractors to perform the required functions in this RFP. Any questions concerning NC HUB certification, contact the [North Carolina Office of Historically Underutilized Businesses](#) at (919) 807-2330. The Vendor shall respond to question a) and b) below.

a) Is Vendor a Historically Underutilized Business? Yes NO

b) Is Vendor Certified with North Carolina as a Historically Underutilized Business? Yes NO

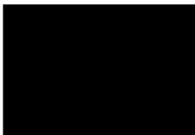
ATTACHMENT F: CERTIFICATION FOR CONTRACTS, GRANTS, LOANS AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal Contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and Contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Vendor, Deloitte & Touche LLP, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Vendor understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.



_____ Signature of Vendor's Authorized Official

Linus Akanoh, Jr. Name and Title of Vendor's Authorized Official

9/11/2025
Date

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

DISCLOSURE OF LOBBYING ACTIVITIES

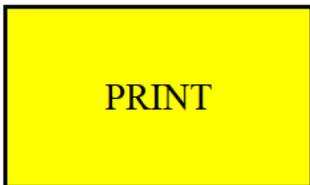
Approved by OMB

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

0348-0046

(See reverse for public burden disclosure.)

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. Report Type: <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____
4. Name and Address of Reporting Entity: <input checked="" type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, <i>if known</i> Deloitte & Touche LLP 621 Hillsborough St., Suite 400 Raleigh, NC 27603 Congressional District, <i>if known</i> :	5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime: N/A Congressional District, <i>if known</i> :	
6. Federal Department/Agency: Housing and Urban Development	7. Federal Program Name/Description: Community Development Block Grant CFDA Number, <i>if applicable</i> : <u>14.218</u>	
8. Federal Action Number, if known: Unknown	9. Award Amount, if known: \$ Unknown	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i> N/A - no lobbying done related to this action.	b. Individuals Performing Services <i>(including address if different from No. 10a)</i> <i>(last name, first name, MI):</i> N/A - no lobbying done related to this action.	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature: [REDACTED] Print Name: _____ Title: <u>Principal</u> Telephone No.: <u>512 203-3476</u> Date: <u>09/11/2020</u>	
Federal Use Only:		Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)



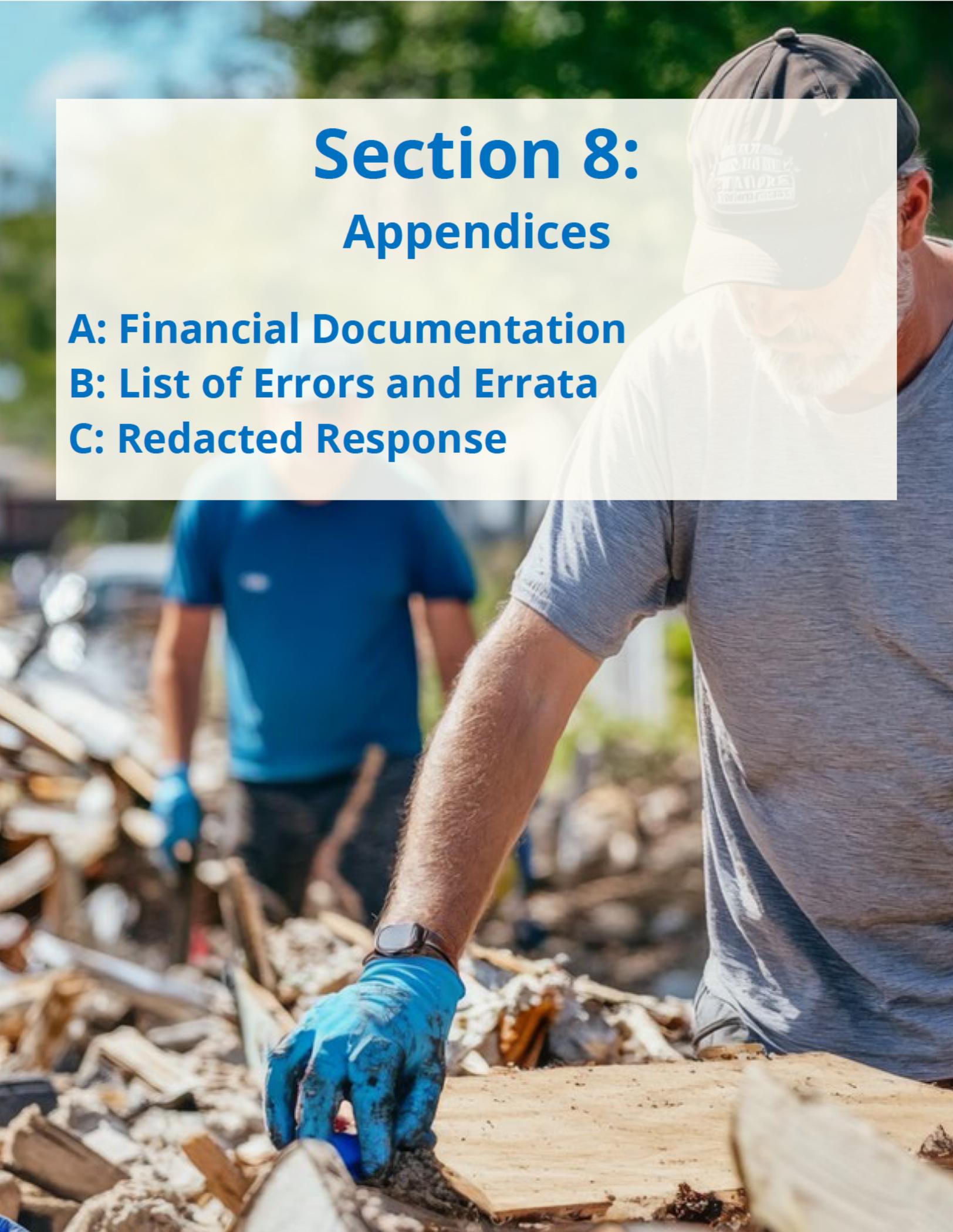
INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.



Section 8: Appendices

A: Financial Documentation

B: List of Errors and Errata

C: Redacted Response



About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

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