Contract Award

Contract Number:	**Doc1677946894**
Contract Description:	**Staff Augmentation**
Vendor:	**Guidehouse**

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

2.0 Signed Execution Pages and Addendum

2.1 Signed Execution Page

STATE OF NORTH CAROLINA *Division of Community Revitalization (DCR)*	
Refer *ALL* Inquiries regarding this RFP to: angela.dunaway@commerce.nc.gov	**Request for Proposals # Doc1677946894** **Proposals will be publicly opened: September 4, 2025, at 2:00 pm ET**
Using Agency: North Carolina Department of Commerce, Division of Community Revitalization	**Commodity No. and Description: 801016 Project management**

EXECUTION

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are offered, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that False certification is a Class I felony and certifies that:

- this proposal is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this proposal, Vendor certifies that it has read and agreed to the INSTRUCTIONS TO VENDORS and the NORTH CAROLINA GENERAL TERMS AND CONDITIONS. This procurement complies with the State's own procurement laws, rules and procedures per *2 CFR § 200.317*.

Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED. Late proposals shall not be accepted.

COMPLETE/FORMAL NAME OF VENDOR:			
Guidehouse, Inc			
STREET ADDRESS: 101 South Tryon Street, Suite 2700		P.O. BOX: N/A	ZIP: 28280
CITY & STATE & ZIP: Charlotte, NC 28280		TELEPHONE NUMBER: (734) 489-6230	TOLL FREE TEL. NO: N/A
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE: 1676 International Drive, Ste 800, McLean, VA 22102			
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Matt Davis, Partner		FAX NUMBER: N/A	
VENDOR'S AUTHORIZED SIGNATURE: [redacted]	DATE: September 11, 2025	EMAIL: mrdavis@guidehouse.com	

VALIDITY PERIOD

Offer valid for at least 90 days from date of proposal opening, or if extended by mutual agreement of the parties. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this RFP.

ACCEPTANCE OF PROPOSAL

If your proposal is accepted, all provisions of this RFP, along with the written results of any negotiations, shall constitute the written agreement between the parties ("Contract"). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply.

FOR STATE USE ONLY Signed by: [redacted] Contract awarded this 19th day of December, 2025, as indicated on the attached certification, by [redacted] ______________________________ (**Authorized Representative of Department of Commerce**).

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): Guidehouse Inc.

Authorized Signature: [redacted]

Name and Title: Matt Davis, Partner

Date: 12/05/2025

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
X	Yes		No	TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
X	Yes		No	TASK 2 – Financial Compliance, Oversight, and Fraud Prevention
X	Yes		No	TASK 3 – Duplication of Benefits (DOB) Compliance
X	Yes		No	TASK 4 – Procurement Compliance and Monitoring
X	Yes		No	TASK 5 – Claims, Appeals, and Case Reviews
X	Yes		No	TASK 6 – Action Plan Development and Amendments
X	Yes		No	TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support
X	Yes		No	TASK 8 – Program Performance Monitoring and Evaluation
X	Yes		No	TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
X	Yes		No	TASK 10 – Audit Readiness and Monitoring Support
X	Yes		No	TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects
X	Yes		No	TASK 12 – Training, Technical Assistance, and Capacity Building
X	Yes		No	TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support
X	Yes		No	TASK 14 – Communication, Public Information, and Outreach Support
X	Yes		No	TASK 15 – Grant Management
X	Yes		No	TASK 16 – Technical Systems Specification & Project Management
X	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)			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79

Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 3 – Duplication of Benefits (DOB) Compliance			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 4 – Procurement Compliance and Monitoring			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 5 – Claims, Appeals, and Case Reviews			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Case Reviewer	$45	$46.35	$47.74
CDBG-DR Claims & Appeals Reviewer	$50	$51.50	$53.05
Training and Technical Assistance Staff	$95	$97.85	$100.79
Training and Technical Assistance Manager	$160	$164.80	$169.74
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 6 – Action Plan Development and Amendments			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74

CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 8 – Program Performance Monitoring and Evaluation			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Civil Rights Specialist	$75	$77.25	$79.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 10 – Audit Readiness and Monitoring Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35

CDBG-DR Program Analyst III	$190	$195.70	$201.57
Engineering Staff	$160	$164.80	$169.74
Engineering Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 12 – Training, Technical Assistance, and Capacity Building			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Training and Technical Assistance Staff	$95	$97.85	$100.79
Training and Technical Assistance Manager	$160	$164.80	$169.74
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 14 – Communication, Public Information, and Outreach Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Communications Staff	$40		
Communications Manager	$150	$154.50	$159.14
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 15 – Grant Management			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79

CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 16 – Technical Systems Specification & Project Management			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Engineering Staff	$160	$164.80	$169.74
Engineering Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 17 – Environmental Review*			
Initial Environmental Review:			
Exempt	$968	$860	$860
Categorically Excluded Not Subject to §58.5	$1,505	$1,290	$1,290
Categorically Excluded Subject to §58.5	$16,340	$16,125	$16,125
Environmental Assessment	$33,325	$32,250	$32,250
Environmental Impact Statements	$376,250	$376,250	$376,250
Reevaluation Environmental Review:			
Exempt	$753	$753	$753
Categorically Excluded Not Subject to §58.5	$1,075	$1,075	$1,075
Categorically Excluded Subject to §58.5	$15,050	$15,050	$15,050
Environmental Assessment	$30,100	$30,100	$30,100
Environmental Impact Statements	$268,750	$268,750	$268,750

*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

State of North Carolina

Department of Commerce–Division of Community Revitalization

Staff Augmentation

Community Development Block Grant-Disaster Recovery Expert Administrative Support

REQUEST FOR PROPOSALS #: DOC1677946894

SEPTEMBER 11, 2025

PROVIDED TO:

State of North Carolina
Division of Community Revitalization
Angie Dunaway
DCR Director of Procurement
Telephone (919) 526-8340
Angela.dunaway@commerce.nc.gov

PROVIDED BY:

Guidehouse Inc.
Matt Davis
Partner
Headquarters: 1676 International Drive, Suite 800 McLean, VA 22102
Telephone: +1 734-489-6230
mrdavis@guidehouse.com

Local Office
101 South Tryon Street, Suite 2700
Charlotte, NC 28280

Guidehouse
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1.0 Title Page

September 11, 2025

Angela Dunaway
Division of Community Revitalization

Submitted via eProcurement

Subject: Staff Augmentation–Community Development Block Grant Disaster Recover Expert Administrative Support | RFP #: Doc1677946894

Dear Ms. Dunaway and Evaluation Committee:

On behalf of **Guidehouse**, we are pleased to submit our proposal in response to the **State of North Carolina's Request for Proposals #Doc1677946894** for **Staff Augmentation** in support of the **Community Development Block Grant–Disaster Recovery (CDBG-DR)** program. We are honored by the opportunity to partner with the **Division of Community Revitalization (DCR)** as North Carolina advances the critical mission of long-term recovery from **Hurricane Helene**.

Team Guidehouse—comprising of Guidehouse and our trusted partners, **Metric Consulting, LLC** and **Greene Street Communications, LLC**—brings unmatched expertise in **HUD-funded disaster recovery and mitigation programs**, including **CDBG-DR** and **CDBG-MIT**. Our team has successfully supported state and local governments nationwide in the aftermath of major disasters, delivering **policy development, compliance, financial oversight, program monitoring, and capacity building**—the very capabilities outlined in this RFP.

We are committed to working in close collaboration with DCR and local stakeholders to deliver:

- **Qualified, Scalable Personnel**: Guidehouse has deployed more than 100 disaster recovery professionals to support **Harris County's $1 billion CDBG-DR portfolio** after Hurricane Harvey, including policy experts, compliance leads, and case managers. In Florida, we augmented the Department of Economic Opportunity's staff across multiple hurricanes, providing both technical and programmatic support. These experiences demonstrate our ability to **mobilize the right expertise at the right time**—an approach we are ready to bring to North Carolina.
- **Proven Systems for Quality and Compliance**: Guidehouse developed and implemented the full suite of **CDBG-DR policies and procedures** for the City of Joplin, Missouri, following the 2011 tornado. Recognized by HUD as a **national benchmark for disaster recovery design and compliance**, these systems enabled timely delivery, successful audits, and positioned Joplin as a model for other grantees.
- **Flexible, Collaborative Approach**: After Hurricane Sandy, Guidehouse partnered with the State of New York to launch and manage the **NY Rising CDBG-DR program**, adapting policies and delivery models in real time to meet evolving federal guidance and community needs. This approach accelerated housing recovery, expanded outreach to vulnerable populations, and embedded resilience throughout the recovery process.

Communities across the nation—from Harris County to Joplin to New York—have relied on Guidehouse to lead complex disaster recovery efforts. We bring that same depth of experience and commitment to North Carolina, fully prepared to address the State's unique challenges and deliver results that matter.

For us, North Carolina is not just another engagement—it's home. Our team members live and work here, giving us an authentic understanding of local priorities and the resilience of its communities. This connection drives our dedication to supporting DCR in building a recovery that is inclusive, transparent, and future-focused. Our promise is simple: to stand shoulder-to-shoulder with the State in creating a stronger, more resilient North Carolina for every resident.

Guidehouse
outwit complexity

Thank you for considering our proposal. We look forward to the opportunity to serve the State of North Carolina and contribute to the success of its CDBG-DR recovery mission. Our proposal conforms to the specifications of the RFP and demonstrates that **Team Guidehouse exceeds the State's minimum requirements**. We affirm that neither our firm nor any key personnel have any actual or potential conflicts of interest related to this engagement.

Please contact **Matt Davis, Partner**, our authorized representative, at **(734) 489 - 6230** or mrdavis@guidehouse.com with any questions.

Sincerely,

[redacted]

Matt Davis
Partner

2.2 Signed Addendum 1

NC DEPARTMENT of COMMERCE
COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

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).

<u>CHANGE TO SOLICITATION</u>:

1. **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.

2. **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-

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			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 *and* a hard copy, or is electronic submission alone sufficient?	Electronic submission alone is sufficient.

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, "*Bid tabulations can be electronically retrieved at the Electronic Vendor Portal (eVP), https://evp.nc.gov*".
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

	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.

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.

		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.

		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.

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.

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

		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.

		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.

		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.

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, *"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."*
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)

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.

		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

	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

		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.

		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.)	eProcurement Sourcing, Section **5.1 VENDOR OFFER**, is where to upload the complete and signed **UNREDACTED** offer. The entire offer should be one (1) pdf file. eProcurement Sourcing, Section **5.3 VENDOR OFFER (REDACTED)**, is where to upload the REDACTED offer.
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?	eProcurement Sourcing, Section **5.2 ATTACHMENT A: PRICING** is where to upload pricing in Excel format. Do not password protect the Excel Price file. 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. Attachment A (RFP page 26) **TASK ORDER CATEGORIES** the vendor should return in pdf 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).
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.

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/directed-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.

		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. DEFAULT AND TERMINATION, 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.

142	Attachment B, VI. BID SUBMISSION, 22. INELIGIBLE VENDORS 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. INELIGIBLE VENDORS 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.

		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	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? • 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.

	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.

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 *level* of the review. However, different project reviews at the *same level* 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.

		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	The section requests technical assistance "including but not limited to civil rights, fair housing, labor standards, and historic preservation." 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. 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?	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, *"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."*

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,

	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.

			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

		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

		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.

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	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." Question: Please confirm the two candidates per position is only applicable to key staff and not all staff listed to support the project.	See response to Question #14, #18, #43, and #49.
203	4.5 Page 16	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" 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.	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: Guidehouse Inc.

AUTHORIZED SIGNATURE: [redacted]

NAME and **TITLE** (Print or Typed): Matt Davis, Partner

DATE: September 11, 2025

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3.0 Narrative Response: Vendor Qualifications and Approach

3.1 Guidehouse's History

Founded in 2018 from PricewaterhouseCoopers's (PwC) U.S. public sector business, Guidehouse began with over 1,500 professionals delivering strategic, technology, and management consulting to federal agencies. Under CEO Scott McIntyre, the firm has grown rapidly through targeted acquisitions and a deep commitment to public service (**Figure 1**).

The integration of Navigant Consulting expanded our reach into commercial markets and strengthened our expertise in regulated industries like healthcare, financial services, energy, and national security. Acquiring Dovel Technologies added nearly 2,000 professionals and advanced capabilities in cloud modernization, agile development, and data analytics—especially across health, human services, and public safety.

Our acquisition of Grant Thornton's Public Sector Advisory practice brought in 1,000 professionals with deep expertise in finance, human capital, IT, and performance management, significantly enhancing our ability to support state and local governments.

In 2023, Guidehouse joined Bain Capital Private Equity in a $5.3 billion transaction, positioning us for continued growth. Today, we are a global firm with over 18,000 professionals across 50+ locations, delivering integrated advisory, technology, and managed services.

Guidehouse proudly partners with state agencies to modernize operations, improve service delivery, and navigate complex regulatory environments to bring tailored solutions that drive efficiency, resilience, and lasting impact.

Figure 1. About Guidehouse

3.2 Our Experience with HUD-Funded Programs and Other Disaster Recovery Work

Team Guidehouse, led by Guidehouse Inc. as the prime contractor and supported by strategic partners Metric Consulting, LLC and Greene Street Communications, LLC, will deliver streamlined, efficient, and tailored support for North Carolina's critical CDBG-DR recovery efforts. In this section, we will demonstrate why Team Guidehouse is fully qualified to support North Carolina's recovery vision and how we will leverage our experience managing large-scale disaster recovery grant programs to deliver quality services and work products for DCR across all seventeen task areas.

We have assembled a multidisciplinary team whose qualifications exceed the Department's minimum requirements for a trusted advisor across all proposed tasks. Our professionals bring deep expertise in

HUD compliance, affordable housing, environmental review, policy and procedure development, training and technical assistance, and comprehensive grant and program management. Drawing on our local presence and familiarity with North Carolina's cultural, regulatory, and operational landscape, we will deliver support that is both effective and responsive. Our partners will contribute highly qualified staff who share a commitment to advancing the State's recovery goals. United by this mission, we offer the specialized capabilities required to deliver a recovery that is efficient, equitable, and fully aligned with federal and state requirements.

The partners we will bring to serve North Carolina include:

Metric Consulting, LLC is a full-service emergency management firm with extensive experience delivering HUD-funded disaster recovery programs, including CDBG-DR administration and compliance. Since 2010, they have provided grant management and administrative services for major recovery initiatives such as the New York Rising Housing Program, Homeowner Opportunity Program (HOP), Homeowner Assistance Program (HAP), and Restore Louisiana Homeowner Assistance Program. Their expertise spans housing, infrastructure, and economic revitalization, as well as environmental reviews for HUD-funded projects.

Metric has supported recovery from some of the largest disasters in U.S. history, including Hurricanes Andrew, Katrina, Michael, Hermine, and Ian, as well as the COVID-19 pandemic. Their services include program design, policy development, compliance oversight, duplication of benefits (DOB) prevention, financial tracking, and performance monitoring. They also bring specialized capabilities in environmental review under 24 CFR Part 58, ensuring projects meet all federal, state, and local requirements.

With a proven track record in CDBG-DR program implementation, Metric helps clients navigate eligibility, achieve low- and moderate-income (LMI) objectives, and maintain full compliance with HUD regulations. They will partner with Guidehouse to provide Subject Matter Experts for environmental assessments, program management, and technical assistance, ensuring North Carolina's recovery programs are efficient, transparent, and resilient.

Greene Street Communications is a **HUBZone-certified business** with more than two decades of experience delivering high-impact communications and emergency management solutions. Their award-winning team has led crisis response efforts for FEMA, the Virginia Department of Emergency Management, and the Virginia Department of Health, including launching FEMA's first virtual JFO and building Virginia's COVID-19 Joint Information Center. Known for sharp messaging, creative media, and deep community insight, Greene Street is a go-to partner for disaster communications, stakeholder engagement, and public trust-building. They are routinely called upon to lead communications in high-pressure environments where clarity, speed, and cultural fluency are essential. In partnership with Guidehouse, they will provide Subject Matter Experts and technicians to support stakeholder engagement, outreach, training, program management, and technical assistance—contributing to recovery programs in North Carolina that are efficient, transparent, and resilient.

Our coalition combines specialized expertise in environmental review, program compliance, strategic communications, and stakeholder engagement—disciplines shaped by experience with some of the nation's most complex disasters. These trusted partnerships enhance the depth and versatility of our team, positioning us to deliver responsive, high-quality support across all seventeen task order categories.

Over the past fifteen years, Team Guidehouse has partnered with over 35 state and local governments to manage more than $10 billion in CDBG-DR funding and over $70 billion in federal funds governed by 2 CFR 200 and cross-cutting requirements such as Section 3, URA, DBRA, NEPA, and MWBE participation. Our work is rooted in more than regulatory compliance—we design and implement systems that restore housing, rebuild infrastructure, and revitalize communities with precision, accountability, and equity.

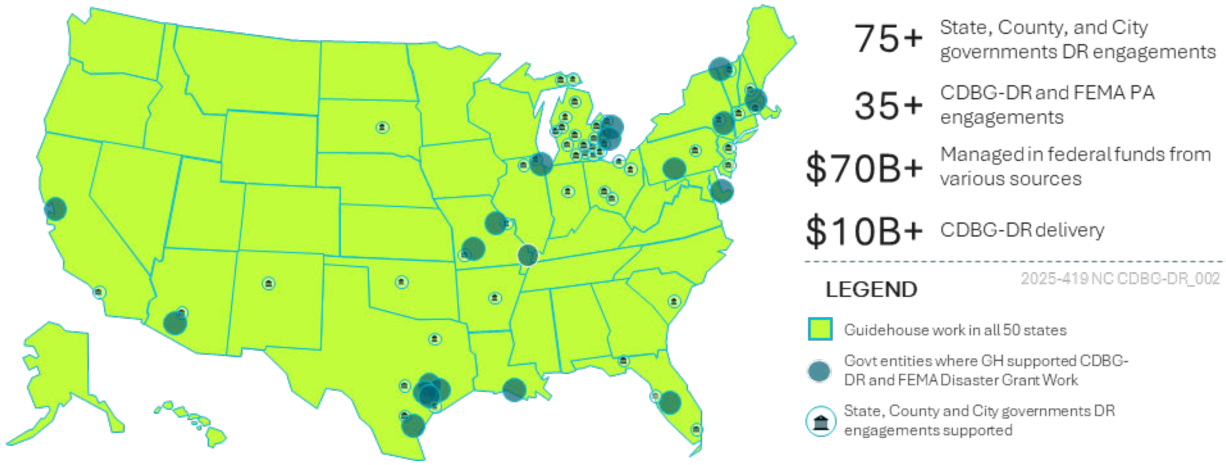

Figure 2. Proven CDBG-DR Leadership:

- Team Guidehouse members Guidehouse and Metric Consulting, served as **monitoring and compliance administrator** for **$4 billion in HUD CDBG-DR funds** for the State of New York following Superstorm Sandy—an engagement that continues more than a decade later.
- Guidehouse supported **Harris County, Texas**, in managing **$1.15 billion in recovery funding** from CDBIG-DR after Hurricane Harvey, delivering grant administration, financial oversight, and strategic planning.
- Through our partner Metric Consulting, Team Guidehouse supported Louisiana's **$4.3 billion Restore Louisiana Homeowner Assistance Program**, developing compliant policies, overseeing vendors, auditing applicant files, and implementing internal controls to prevent fraud and duplication of benefits.

Comprehensive Federal Compliance Expertise:

We have advised more than **75 state and local entities** on programs funded by HUD, FEMA, EPA, Departments of Energy and Transportation, and the U.S. Treasury. Our team integrates compliance into every layer of program delivery—embedding regulatory requirements into subawards, streamlining oversight, and transforming complex mandates into operational workflows. From URA compliance for more than 700 displaced tenants in Houston to environmental reviews under 24 CFR Part 58, we apply proactive, precise strategies to meet all regulatory requirements.

Operational Agility and Innovation:

- Built **monitoring frameworks** that track performance and flag risks early.
- Designed **geospatial dashboards** to visualize impact and progress.
- Developed **Action Plans and amendments** that reflect evolving needs and priorities.
- Delivered **training and technical assistance** to build local capacity and ensure sustainability beyond the initial recovery phase.

Local Presence and Subject Matter Expertise:

Our team includes experts in housing strategy, environmental review, financial compliance, and community engagement—many of whom already live and work in North Carolina. We bring a strong understanding of the State's cultural, regulatory, and operational landscape, along with hands-on experience in mobile home replacement programs, multifamily development in flood-prone areas, and resilient infrastructure projects. Our partners contribute specialized capabilities in communications, outreach, and stakeholder engagement, helping expand equitable access to recovery resources across diverse communities.

Our experience managing large-scale recovery efforts in jurisdictions across the United States has equipped us with the operational agility, regulatory fluency, and technical depth needed to deliver across housing, infrastructure, compliance, and program management. Whether developing policies, conducting environmental reviews, or supporting stakeholder engagement, our team brings a proven track record of translating complex recovery requirements into effective, community-centered solutions.

Table 1 presents a representative selection of projects that demonstrate our extensive experience supporting communities in managing **CDBG-DR** and other complex federal awards governed by **2 CFR 200** and related cross-cutting requirements. These examples were carefully chosen to illustrate the depth and breadth of our capabilities across all task areas identified in the RFP. For additional details on these engagements, please refer to **Attachment H – Examples** in Section 5.0.

Table 1. Team Guidehouse Disaster Recovery Experience

#	Client Name	Program	Period of Performance	Amount Managed ($)
1	**New York Office of Resilient Homes and Communities (RHC)**	**CDBG-DR**	**3/2013 – 4/2025**	**$4,100,000,000**
Brief Project Description				
Following Superstorm Sandy in 2012, Guidehouse played a pivotal role in helping New York State establish and operate the Governor's Office of Storm Recovery (now Resilient Homes and Communities), enabling the efficient disbursement of $8B in federal aid. Since 2013, Guidehouse has provided comprehensive support across housing, infrastructure, small business, compliance, and program closeout where we've delivering strategic guidance, operational execution, and data-driven insights that have benefited over 10,000 households and hundreds of infrastructure projects.				
2	**City of Joplin, Missouri**	**CDBG-DR**	**7/2017 – 12/2021**	**$158,000,000**
Brief Project Description				
Following the catastrophic EF-5 tornado in 2011, Guidehouse supported the City of Joplin in managing $158M in HUD CDBG-DR funds, providing end-to-end program and grant management across housing, infrastructure, economic revitalization, and public services. Our work included establishing project frameworks, stakeholder engagement, compliance and monitoring systems, environmental reviews, and program implementation, ultimately helping the city rebuild critical infrastructure, support over 600 families with housing assistance, and deliver services to vulnerable populations.				
3	**Harris County, Texas**	**CDBG-DR**	**11/2018 – 12/2024**	**$1,150,000,000**
Brief Project Description				
Following Hurricane Harvey, Guidehouse supported Harris County Texas, one of the most populous counties in the U.S., in administering over $1.15B in federal recovery funds, including HUD CDBG-DR, FEMA PA, and FHWA-ER. Our work spanned strategic planning, program design, compliance, and infrastructure revitalization, helping the county implement housing programs for thousands of residents, enhance procurement and monitoring systems, and establish a Strategic Recovery Office to coordinate long-term disaster recovery efforts.				
4	**Texas General Land Office (GLO)**	**CDBG-DR**	**01/2019 – 11/2023**	**N/A**
Brief Project Description				
Team Guidehouse member Metric provided environmental services and damage assessments for the Texas GLO's Homeowner Assistance Program, conducting tiered environmental reviews compliant with 24 CFR Part 58 and related laws to support federally funded housing recovery. Their work included field inspections, GIS-enabled mapping, and regulatory compliance verification for floodplain management, historic preservation, endangered species, and construction standards which ensured homes meet HUD, IRC, and local code requirements while streamlining documentation and audit readiness through a custom GIS web application.				
5	**Louisiana Office of Community Development (OCD)**	**CDBG-DR**	**04/2017 – Present**	**$4,300,000,000**
Brief Project Description				
Team Guidehouse member Metric supports the State of Louisiana's Restore Louisiana Homeowner Assistance Program by developing HUD-compliant policies and procedures, overseeing vendors, and implementing monitoring systems to ensure program integrity and regulatory compliance. Their work spans duplication of benefits controls, fraud prevention, audit readiness, and construction quality assurance.				
6	**Florida Division of Emergency Management (FDEM)**	**FEMA-PA**	**10/2017 – 6/2024**	**$255,000,000**
Brief Project Description				
Guidehouse supported financial recovery efforts across the eight-county Tampa Bay region by validating project costs, auditing subrecipients for compliance, and maintaining accurate reporting and documentation for FEMA quarterly reports and closeouts. Their work included site visits, scope verification, and performance assessments to help maximize reimbursements and uphold regulatory standards.				

Table 1. Team Guidehouse Disaster Recovery Experience

#	Client Name	Program	Period of Performance	Amount Managed ($)
7	**Arizona Department of Emergency and Military Affairs (DEMA)**	**FEMA-PA**	**1/2021 – 11/2022**	**$183,000,000**
Brief Project Description				
Guidehouse supported the Arizona Department of Emergency and Military Affairs (DEMA) in navigating FEMA Public Assistance (PA) funding related to COVID-19 by guiding applicants through eligibility, documentation, and compliance processes. Our strategic and hands-on approach helped DEMA catch up on reporting requirements and mitigate risks of fund return due to noncompliance or ineligible use.				
8	**Vermont Department of Public Safety, Office of Emergency Management**	**FEMA-PA**	**7/2023 – Present**	**$344,500,000**
Brief Project Description				
Following the devastating floods in Vermont in July 2023 and July 2024, Guidehouse was engaged to support the State's recovery and long-term resilience efforts. Working directly with the State's Recovery Office and over 50 high-priority applicants, Guidehouse provides hands-on FEMA Public Assistance and Hazard Mitigation guidance, project management, documentation support, and strategic coordination, helping Vermont maximize federal reimbursements, reduce financial burdens, and rebuild more resilient infrastructure in flood-prone areas.				
9	**Massachusetts Emergency Management Agency (MEMA)**	**FEMA-PA**	**4/2020 – 12/2024**	**$1,654,600,000**
Brief Project Description				
To support the State of Massachusetts in managing over 900 FEMA Public Assistance applicants, Guidehouse established a reimbursement and documentation unit that provided technical assistance to over 60 high-risk applicants. The team developed tailored application strategies, reviewed documentation for compliance, and built a secure online dashboard that tracked over $1B in COVID-19 costs and 175,000 documents, ultimately helping the state obligate approximately $1.7B in federal funds.				
10	**North Carolina Clean Energy Fund (NCCEF)**	**GGRF**	**6/2025 – 8/2025**	**N/A**
Brief Project Description				
The North Carolina Clean Energy Fund (NCCEF) engaged Guidehouse to evaluate its internal control framework, financial management systems, and policies and procedures for compliance with EPA terms and conditions and 2 CFR 200 requirements for their Greenhouse Grant Reduction Fund (GGRF) grant. Guidehouse then partnered with NCCEF to implement targeted improvements, strengthening policies related to procurement, conflict of interest, federal reporting, and time and effort documentation. These enhancements improved NCCEF's ability to maintain compliance, reduce risk, and ensure readiness for managing federal funds effectively.				
11	**U.S. Environmental Protection Agency (EPA)**	**CCGP**	**1/2024 – 2/2025**	**N/A**
Brief Project Description				
Team Guidehouse member Greene Street Communications provided expert technical assistance to over 300 organizations applying for the EPA's $2B Community Change Grants Program (CCGP), simplifying federal requirements and delivering tailored coaching and proposal reviews. These efforts enabled small nonprofits to submit competitive applications for up to $20M, expanding equitable access to climate and environmental justice funding in underserved communities.				
12	**Missouri Department of Economic Development**	**CDBG-DR/MIT**	**6/2022 – 7/2023**	**$89,300,000**
Brief Project Description				
Following the 2017 and 2019 federally declared disasters in Missouri, Guidehouse supported the State's Department of Economic Development in administering CDBG-DR and CDBG-MIT funds. Their work included conducting a comprehensive needs assessment, developing HUD-compliant policies and procedures across multiple housing and infrastructure programs, and delivering tailored training to state staff and subrecipients. Guidehouse's efforts enabled full compliance with federal regulations, strengthened internal capacity, and empowered local governments to manage recovery funds effectively.				

These engagements reflect direct experience across multiple task order categories, including policy and SOP development, financial compliance, program performance monitoring, and grant management. Each project highlights our ability to deliver administrative, technical, and programmatic support in close coordination with state and local stakeholders—fully aligned with DCR's priorities for scalable staffing, regulatory compliance, and disaster recovery expertise. These examples also underscore our capacity to support HUD-funded programs with rapid deployment, rigorous quality assurance, and transparent reporting.

To make this alignment clear, **Table 2** below concisely maps each project to the specific RFP task areas it supports. Each row references the project number from the previous table, allowing reviewers to easily connect the detailed project descriptions with the corresponding task order categories. This structure provides a clear, at-a-glance view of how our past performance directly addresses the full scope of services requested by the State.

Table 2. Experience Supporting Task Areas

Task #	Task Description	Project
1	Development of Policies, Procedures, and Standard Operating Procedures (SOPs)	1 2 3 4 5 7 8 9 10 11 12
2	Financial Compliance, Oversight, and Fraud Prevention	1 2 3 5 6 7 8 9 10 11 12
3	Duplication of Benefits (DOB) Compliance	1 2 3 5 6 7 8 9 11 12
4	Procurement Compliance and Monitoring	1 2 3 4 5 10
5	Claims, Appeals, and Case Reviews	1 2 6 7 8 9 11 12
6	Action Plan Development and Amendments	1 2 3 4 5
7	Needs Assessments, Market Analysis, and Geospatial Support	1 2 3 4 5 12
8	Program Performance Monitoring and Evaluation	1 2 3 4 5 6 7 8 9 11 12
9	Civil Rights, Fair Housing, Labor Standards, and Historic Preservation	2 4 12
10	Audit Readiness and Monitoring Support	1 3 4 5 6 7 8 9 10 11 12
11	Technical and Engineering Support for Infrastructure and Housing Projects	1 2 3 4 5
12	Training, Technical Assistance, and Capacity Building	1 2 3 5 6 7 8 9 11 12
13	Relocation Program (URA/TRA) Development and Compliance Support	3 8 12
14	Communication, Public Information, and Outreach Support	1 2 3 5 8
15	Grant Management	1 2 3 4 5 8 12
16	Technical Systems Specification & Project Management	3 4 8

17	Environmental Review	2 4 8

3.3 Our Understanding and Approach to Fulfilling Task Orders

Hurricane Helene has had a profound and far-reaching impact on western North Carolina, leaving over 8,800 homes severely damaged or destroyed, causing widespread infrastructure failures, and generating nearly $60 billion in estimated losses. This devastation has reshaped the region and placed extraordinary demands on state and local agencies. We recognize the immense challenges faced by North Carolina's residents—particularly those in the most impacted and distressed (MID) areas—and commend the State's swift, coordinated response to address both immediate and long-term needs.

The region's mountainous terrain adds complexity to recovery efforts. Steep slopes, dispersed rural communities, and limited access routes have compounded the effects of the storm, making housing reconstruction, infrastructure repair, and service delivery especially challenging. Many residents remain isolated due to damaged private roads and bridges, making the restoration of safe, resilient access not only a logistical necessity but a lifeline for these communities. Team Guidehouse will approach this work with deep respect for the region's geography and a commitment to solutions that are both technically sound and sensitive to the realities of mountain communities.

North Carolina's recovery priorities, as outlined in the HUD CDBG-DR Action Plan, include:

- **Restoring safe, resilient housing** for homeowners and renters, with emphasis on low- and moderate-income (LMI) households and vulnerable populations;
- **Rebuilding and strengthening critical infrastructure**—roads, bridges, utilities—to ensure access and resilience for rural and isolated communities;
- **Revitalizing local economies and commercial districts** to support small businesses, agriculture, and tourism;
- **Integrating mitigation and resilience** into all recovery activities to reduce future risk and protect public investment;
- **Ensuring equity, fair housing, and civil rights compliance** throughout program design and delivery, with targeted outreach to historically underserved communities.

We also understand that DCR's strategy is to establish a pre-qualified vendor pool capable of rapidly mobilizing resources and expertise to execute a wide range of tasks under a complex, evolving disaster recovery program. This approach reflects the State's recognition that recovery priorities will shift over time and require partners who can scale quickly, adapt to changing conditions, and deliver with precision and accountability.

To meet these objectives with compassion and precision, Team Guidehouse will apply a disciplined yet flexible management framework designed to support task order execution across all RFP task areas. Our methodology, **TruePMO℠**—built on proven project management principles, agile practices, and decades of experience supporting federal, state, and local agencies—provides the structure, scalability, and adaptability needed to deliver results on time, on budget, and with full transparency to DCR (**Figure 3**).

Figure 1. Project Management Core Disciplines

Guidehouse's TruePMO℠ Framework

Our **TruePMO℠** approach combines the rigor of the PMI Project Management Body of Knowledge (PMBOK) with the flexibility of agile delivery. It is designed to maximize efficiency, reduce risk, and maintain compliance throughout the program's lifecycle. This framework supports both strategic oversight and tactical execution, enabling rapid response to evolving priorities while maintaining alignment with CDBG-DR requirements, the State Action Plan, and federal regulations, making it the perfect framework to govern our Team's execution of tasks across DCR's 17 task areas. Core disciplines of our **TruePMO℠** approach include:

- **Project & Program Governance:** Define clear roles, decision-making authority, and accountability, with a **dedicated Project Manager** serving as the single point of contact for task order execution.
- **Integrated Schedule Management:** Use tools like **Microsoft Project, SharePoint,** and **Smartsheet** to develop and maintain detailed schedules that track milestones, dependencies, and resource allocation, allowing rapid adjustments to meet changing needs.
- **Quality & Knowledge Management:** Apply **SharePoint-based document control** and **peer review protocols** to maintain accuracy and compliance; capture lessons learned in a centralized knowledge repository.
- **Risk & Issue Management:** Maintain an active **risk register in Jira or similar tools**, with assigned owners and mitigation strategies to address compliance, operational, and scheduling risks.
- **Financial Management:** Leverage **Deltek Costpoint** and **Power BI dashboards** for real-time budget tracking, invoicing accuracy, and transparent reporting to DCR.
- **Change Management & Communications:** Use **Teams and Asana** for real-time collaboration, formal change request workflows, and structured communication plans to keep stakeholders informed.

Building on the proven methods and advanced tools within our TruePMO℠ framework, we will take the following actions for each task order:

- **Conduct a Kickoff Meeting** to confirm objectives, define roles, and establish governance and communication protocols.
- **Refine Work Plans and Timelines** based on CDBG-DR requirements, the State Action Plan, and stakeholder input.
- **Develop Implementation Plans** that outline tasks, dependencies, and milestones for efficient execution.
- **Provide Structured Communication Support**, including meeting facilitation, documentation, and real-time collaboration tools.
- **Perform Needs Analysis and Technical Scoping** to identify specialized expertise and inform resource planning.
- **Deliver Ongoing Oversight and Reporting** using **Power BI dashboards** and **status reports** to track progress, manage risks, and maintain alignment with program objectives.

This framework serves as the backbone of our delivery model, allowing every task order—regardless of size or complexity—to be executed with speed, precision, and compliance. It reflects our commitment to helping DCR achieve its mission: a recovery that is efficient, equitable, and resilient.

3.4 Quality Assurance, Regulatory Compliance, and Project Oversight

Building on the disciplined framework described earlier, Team Guidehouse applies an integrated approach that begins with strong project oversight, embeds regulatory compliance into every process, and reinforces quality assurance as a continuous standard. These systems are designed to meet the unique demands of CDBG-DR programs, where accuracy, timeliness, and transparency are critical to maintaining HUD compliance and delivering equitable recovery outcomes.

Project Oversight: Governance and Control for Complex Recovery Programs

Effective oversight is the foundation of successful CDBG-DR delivery. Our project oversight model is built on transparent governance, robust project management, and real-time executive visibility. We commit to regular, thorough updates and can stand up dashboards, trackers, and reporting tools for real-time visibility over status, funding, and next actions—enabling timely, data-backed decision-making. We have implemented both public-facing dashboards and internal near real-time dashboards, allowing our clients and teams to achieve transparency and data-driven decision-making across the program.

Spotlight Experience: In Harris County, Texas, we managed over $1.15 billion in CDBG-DR funds following Hurricane Harvey. Our team stood up a Strategic Recovery Office, developed program design for $880M in housing programs, and implemented a public-facing dashboard to track funding commitments across the County. Weekly executive updates and risk-based monitoring allowed County leadership to make timely, data-driven decisions. Similarly, in Joplin, Missouri, we developed an Integrated Master Schedule—recognized by HUD as an exemplary practice—that linked project milestones to funding deadlines, reducing delays and accelerating recovery.

Regulatory Compliance: Built into Every Workflow

Compliance is not an afterthought—it is embedded in every process. Our systems draw on deep expertise with HUD CDBG-DR and other complex federal programs subject to 2 CFR 200 and similar cross-cutting requirements to keep all activities aligned with federal and state requirements.

How We Do It:

- Standardized SOPs and Checklists for HUD requirements, including Section 3, URA, DBRA, NEPA, and Fair Housing.
- Cost Validation Tools tailored to CDBG-DR and FEMA PA rules to prevent ineligible costs and duplication of benefits (DOB).
- Fraud and Risk Detection using advanced analytics and AI-driven platforms to identify anomalies in applicant data or reimbursement requests.
- Continuous Training for staff and subrecipients to maintain current knowledge of evolving HUD guidance.

Spotlight Experience: During our work with the New York Governor's Office of Storm Recovery (now RHC), we developed monitoring checklists and compliance templates that supported HUD reviews and internal audits. Our team identified and corrected potential compliance gaps before they became findings, safeguarding over $4 billion in CDBG-DR funds. In Joplin, we implemented a risk-based monitoring plan that prioritized high-risk subrecipients and established a cadence for compliance reviews—**another practice HUD cited as exemplary**.

Quality Assurance: Continuous, Audit-Ready Performance

In CDBG-DR, quality assurance means building audit readiness into every step. We adopt a "closeout on Day 1" mindset, so all documentation is accurate, complete, and **ready for HUD or OIG review at any time. Our QA Approach Includes:**

- Document Control: Centralized repositories and naming conventions for eligibility files, environmental records, and financial documentation.
- Layered Reviews: Workstream leads and SMEs validate compliance with HUD policies before files move forward.
- Technology-Enabled QA: Dashboards track application status, environmental reviews, and construction progress; AI tools flag missing signatures or incomplete DOB documentation.
- Training and Job Aids: Role-specific guides reduce errors in critical processes like income verification or procurement documentation.

Spotlight Experience: In New York, we implemented a QA/QC Work Plan for the Housing Construction Program that included detailed monitoring checklists and a scoring system to evaluate compliance with grant requirements. This approach identified gaps early and drove corrective actions, reducing risk of HUD findings. In Collier County, Florida, our partner Metric applied similar rigor to environmental reviews under 24 CFR Part 58, preparing NEPA documentation and coordinating with SHPO and USFWS to maintain compliance while advancing project timelines.

How It All Works Together

Our approach starts with governance and oversight, which sets the structure for compliance and quality. Compliance controls are embedded into every workflow, so all activities align with HUD and state requirements. Finally, quality assurance acts as a continuous safeguard, supported by technology and layered reviews, to maintain accuracy and accountability. Together, these systems create a closed-loop framework that tracks every dollar, manages every risk, and delivers every outcome audit-ready and aligned with DCR's objectives.

3.5 Staffing Capacity

With a core workforce of more than 18,000 professionals—expanding to over 22,000 with our teaming partners—Team Guidehouse is uniquely positioned to rapidly staff and scale teams in response to DCR's evolving needs. Our experience managing large, high-volume, task order-based contracts enables us to quickly mobilize multidisciplinary teams for any project, whether it requires immediate surge staffing or specialized technical expertise.

Speed to Staff:

Team Guidehouse maintains a robust internal talent pipeline and a pre-vetted roster of subject matter experts, analysts, and technicians, allowing us to fill key roles within days of task order issuance. For example, following Hurricane Harvey, we deployed a full program management office and technical teams to Harris County within a week, supporting over $1.15 billion in CDBG-DR recovery programs. In Joplin, Missouri, we stood up intake centers and field teams within days to support urgent housing and infrastructure needs. This agility allows DCR to address urgent priorities—such as single-family home repair, multifamily housing, business district revitalization, and infrastructure projects—without delay.

Commitment to Resource Continuity:

We recognize that continuity of staffing is critical to maintaining project momentum, minimizing disruptions, and keeping recovery efforts on schedule. Team Guidehouse commits to keeping core resources engaged throughout the life of each project or task order. Our staffing model is designed to minimize turnover by assigning dedicated Engagement Partners, Project Managers, and key technical leads who remain with DCR from project initiation through closeout. This approach reduces onboarding time, preserves institutional knowledge, and fosters strong working relationships with DCR and local stakeholders.

Flexible, Multidisciplinary Teams:

For each DCR project, we will assemble a tailored team based on the project's specific requirements and surge needs. Our typical staffing structure includes:

- An **Engagement Partner** for strategic oversight and client liaison;
- A **Project Manager** for daily coordination and deliverables;
- **Senior and Junior Consultants** for technical and programmatic support;
- **Subject Matter Experts** in compliance, environmental review, financial oversight, and stakeholder engagement;
- **Administrative and case management staff** for intake, documentation, and customer service.

This structure allows us to deploy the right expertise at the right time—supporting DCR with agile, mission-driven teams that are equipped to meet evolving recovery needs with precision and accountability. Each role is filled by professionals with direct experience in HUD, FEMA, and cross-cutting federal requirements. A summary of responsibilities and qualifications for each labor category is provided **Table 3**.

Table 3. Roles and Qualifications

Role	Role Responsibilities	Typical Qualifications
Engagement Partner	Will provide strategic oversight, serve as the primary client liaison, and guide the overall direction of the engagement. They will be responsible for executive-level decision-making, risk management, and escalation of critical issues.	Will possess 15+ years of experience in federal grant management, disaster recovery, or public sector consulting, and hold advanced degrees or professional certifications.
Subject Matter Experts	Will provide specialized expertise in compliance, environmental review, financial oversight, construction management, stakeholder engagement, or other technical domains. They will advise on regulatory interpretation, develop technical solutions, and support complex problem-solving.	Will possess 10–30 years of experience and advanced credentials in their fields such as Master's or PhD degrees and/or certifications such as Certified Grants Management Specialist (CGMS), Project Management Professional (PMP), Certified Public Accountant (CPA), or Professional Engineer (PE),
Project Manager	The Project/Program Manager will oversee the day-to-day operations of the disaster recovery project. They will manage project timelines, coordinate with team members, and ensure that project milestones are met. The Project/Program Manager will also handle risk management and reporting.	Possess 5 to 15 years of experience with a strong track record in supervising federal awards and leading large, complex teams. Many hold advanced certifications such as CGMS, PMP, CPA, or PE.
Senior Consultant	Will deliver technical and programmatic support, lead workstreams, and provide subject matter expertise in areas such as compliance, policy, or financial management. Their responsibilities will include developing policies and procedures, conducting risk assessments, and mentoring junior staff.	Will Have 4–15 years of experience in disaster recovery, HUD or federally funded programs, or state/local government operations, and may hold certifications such as CGMS, PMP, CPA, or PE.
Consultant	Will support data analysis, documentation, research, and project coordination. They will assist with reporting, intake, eligibility reviews, and day-to-day project tasks.	Will have 2–7 years of relevant experience and a strong foundation in public administration, finance, engineering, or related disciplines.
Administrative / Case Management Staff	The Administrative/Clerical Support will provide essential administrative assistance to the project team. They will handle scheduling, documentation, communication, and other clerical tasks to ensure smooth project operations.	These professionals will have backgrounds in office administration, case management, or customer service, and will be responsible for maintaining accurate records, supporting application processing, and assisting both internal teams and external stakeholders.

Team Guidehouse's Approach to Staffing, Monitoring, and Surge Capacity for DCR Projects

To meet DCR's need for flexible, scalable staff augmentation across multiple concurrent projects, Team Guidehouse will apply the centralized project management and resource coordination capabilities of our **TruePMO℠** framework. This system maintains a real-time staffing map that tracks personnel availability, specialized skillsets, and current assignments across all active task orders—allowing us to respond quickly and effectively as priorities shift.

Proactive Staffing and Resource Matching

Our PMO continuously monitors project pipelines, deliverables, and resource distribution, enabling rapid alignment of qualified professionals with DCR's evolving needs. Whether supporting fast-paced, geographically dispersed, or highly technical assignments, we draw from a deep internal talent pool and pre-vetted partners to mobilize teams without delay. During the Harris County Hurricane Harvey recovery, for example, our PMO coordinated multiple workstreams, co-located staff with County departments, and scaled up within days to meet urgent program demands.

Centralized Oversight and Real-Time Adjustments

TruePMO℠ provides a single point of oversight for staffing and project delivery. Project managers submit regular updates on staffing levels, workload, and budget utilization, while the PMO conducts periodic reviews to identify gaps or surpluses. Digital tools—including a dynamic Digital Staffing Map—

visualize assignments and availability in real time, supporting agile adjustments as project needs evolve. This approach proved critical in our work with the City of Joplin, where we managed an Integrated Master Schedule and coordinated multiple teams to keep recovery efforts on track.

Rapid Surge and Continuity

When urgent staffing needs arise—due to new legislation, program launches, or unforeseen demand—our Program Manager works directly with DCR to assess scope, identify qualified candidates, and expedite onboarding. Because our professionals are already trained in federal grant management, disaster recovery, and compliance, we minimize ramp-up time and deploy high-performing staff quickly. Throughout each engagement, we prioritize continuity by keeping core resources engaged from initiation through closeout, preserving institutional knowledge and maintaining momentum.

Examples of our staffing approach include:

For the NY State Emergency Rental Assistance Program (ERAP), Guidehouse stood up 2,000 FTEs in a matter of weeks that led to the rapid establishment of the $46B+ ERAP for the State of New York.

For the Small Business Administration (SBA) we supported a wide range of initiatives —including the Paycheck Protection Program (PPP), Economic Injury Disaster Loans (EIDL), the Restaurant Revitalization Fund, debt relief, and expanded programs, resulting in the surge support of over 600 professionals, delivering project management, fraud risk management, data analysis, loan and forgiveness application processing, business requirements documentation, technology development, systems integration, and virtual customer service call center support.

This deep bench and flexible staffing model—backed by ongoing investment in recruiting, training, and retaining top talent—will position DCR to access the right expertise at the right time. Whether the need is for program management, data analytics, compliance, or community engagement, Team Guidehouse will deliver the resources and results required for successful, resilient, and compliant recovery program delivery.

3.6 Proposed Staff

Team Guidehouse has assembled a robust pool of highly capable and experienced professionals, each ready to be deployed across multiple task areas in support of DCR's mission. The team presented below represents a cross-section of our broader talent base—demonstrating the depth, diversity, and specialized expertise we bring to disaster recovery, federal grant management, and program implementation.

Our professionals have a proven track record delivering results for CDBG-DR and other federal grant programs nationwide, including large-scale housing, infrastructure, economic revitalization, public services, and mitigation initiatives. This group includes Certified Public Accountants (CPAs), Certified Grants Management Specialists (CGMS), engineers, policy analysts, environmental specialists, and program managers with direct experience supporting HUD, FEMA, and state recovery agencies.

Team Guidehouse's bench of experienced federal grants management professionals includes 13 professionals that have been recognized as CGMS by the National Grants Management Association, which has one of the highest populations of CGMS credentialed professionals among consulting firms. The CGMS is a prestigious credential developed by the National Grants Management Association (NGMA) to elevate professional standards and enhance individual performance in grants management. It signifies mastery of the full lifecycle of grants management, including compliance with federal regulations and leading practices. The certification is recognized across various sectors, including government, nonprofits, education, and private industries, and demonstrates a commitment to maintaining high competency standards in the profession.

For every DCR project, we will draw from this pool to assemble multidisciplinary teams tailored to the specific requirements of each task order. Our approach enables us to rapidly scale resources, maintain continuity, and deliver the right expertise for every assignment—whether for urgent surge staffing, specialized technical support, or sustained program delivery.

Table 4 highlights the qualifications and experience of our proposed team members, each of whom is ready to support DCR's priorities. Full resumes for each proposed staff member can be found in Section 5.0.

Table 4. Proposed Staff and Task Alignment

Name, Title Years of Experience	Task 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Matt Davis, CDBG-DR Engagement Partner 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Kajal Patel, CDBG-DR Engagement Partner 14 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Gaurav Menon, CDBG-DR SME 22 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Dami Kehinde, CDBG-DR SME 19 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓
Suzanne Settoon, CDBG-DR SME 19 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Raquel Malmberg, Federal Grants Management SME 20 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Dustin Hinkel, Federal Grants Management SME 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Greg Heller, Housing and Homeless SME 17 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Laura Slutsky, Housing and Homeless SME 17 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Michael Powell, Fraud, Waste, and Abuse Prevention SME 30 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Irene Pasternak, Fraud, Waste, and Abuse Prevention SME 20 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Stacey Weinick, CDBG-DR Project Manager 11 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Kristen Manis, CDBG-DR Project Manager 25 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Bruce Roberts, CDBG-DR Project Manager 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Faraz Shamsi, CDBG-DR Project Manager 19 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Andrea Mannino, CDBG-DR Project Manager 14 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Juliann Bertone, CDBG-DR Project Manager 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Taylor Burandt, CDBG-DR Planning and Policy Manager 9 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	

Name, Title Years of Experience	Task																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Noura Chbeir, CDBG-DR Planning and Policy Manager 7 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Henry Walker, CDBG-DR Planning and Policy Staff 23 Years	✓		✓	✓			✓	✓	✓		✓			✓	✓		
Candice Mahoney, CDBG-DR Planning and Policy Staff 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Doug Veivia, Financial Compliance Manager 30 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Darian Cole, Financial Compliance Manager 20 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Charles Arnold, Financial Compliance Staff 30 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Alena Edmonds, Financial Compliance Staff 7 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Chris DeHanas, Engineering Manager 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Liz Hiddemen, Engineering Manager 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	
Brandon Kanatani, Engineering Staff 20 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Diederik Bisset, Engineering Staff 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		
Lester Cutchall, Engineering Staff 34 Years	✓		✓	✓			✓	✓	✓		✓			✓	✓		
Joel Rattler, Engineering Staff 15 Years	✓		✓	✓			✓	✓	✓		✓			✓	✓		
Abdel Bobby Ghanny, Engineering Staff 20 Years	✓		✓	✓			✓	✓	✓		✓			✓	✓		
Jamilah Fraser, Communications Manager 20 Years	✓	✓	✓	✓		✓	✓	✓		✓		✓		✓	✓		
Shana Kemp, Communications Manager 20 Years	✓		✓	✓		✓	✓	✓				✓		✓	✓		
Tyler Cruz, Communications Staff 10 Years	✓											✓		✓		✓	
Chelsea Carter, Communications Staff 4 Years							✓					✓		✓			
Michael Wagenhauser, Training and Technical Assistance Manager 24 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Curtis Brown, Training and Technical Assistance Manager 20 Years	✓	✓	✓	✓		✓	✓	✓		✓		✓		✓	✓		

Name, Title Years of Experience	Task 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Cherrise Wilks, Training and Technical Assistance Staff 15 Years	✓	✓	✓	✓		✓	✓	✓		✓		✓		✓	✓		
Halima Anderson, Training and Technical Assistance Staff 10 Years	✓	✓	✓	✓		✓	✓	✓		✓		✓		✓	✓		
Rob Myers III, Environmental Manager 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Matthew Paek, Environmental Support 2 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Verónica Olivera Vélez, Civil Rights Specialist 15 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓		✓
Jarred McCormick, Civil Rights Specialist 10 Years	✓	✓	✓	✓	✓	✓		✓	✓	✓				✓	✓		✓
Kelli Pavelko, CDBG-DR Program Analyst III 13 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Portia Egan, CDBG-DR Program Analyst III 10 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Nadia Brual, CDBG-DR Program Analyst II 15 Years	✓	✓	✓	✓		✓	✓	✓		✓		✓		✓	✓		
Samuel Hitchcock, CDBG-DR Program Analyst II 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Emily Pinell, CDBG-DR Program Analyst I 8 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Finn McCarthy, CDBG-DR Program Analyst I 2 Years	✓					✓		✓		✓					✓		
Patricia Holland, CDBG-DR Compliance and Monitoring Analyst III 15 Years	✓		✓	✓			✓	✓	✓		✓			✓	✓		
Adia Preston, CDBG- DR Compliance and Monitoring Analyst III 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Brent Puckett, CDBG- DR Compliance and Monitoring Analyst III 12 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Justin Cauley, CDBG- DR Compliance and Monitoring Analyst III 11 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓
Victor Benito, CDBG-DR Compliance and Monitoring Analyst II 10 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	
Kiley Fitzgerald, CDBG-DR Compliance and Monitoring Analyst I 4 Years	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	

Name, Title Years of Experience	Task																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Hannamarie Hohener, CDBG-DR Compliance and Monitoring Analyst I 3 Years	✓					✓		✓		✓					✓		
Augusta Udemba, CDBG-DR Case Reviewer 3 Years	✓				✓					✓					✓		
Xavier Concha, CDBG-DR Case Reviewer 3 Years	✓			✓	✓			✓		✓							
Ashley Jaynes, CDBG-DR Claims & Appeals Reviewer 4 Years			✓		✓	✓		✓						✓	✓		
Michelle Simon-Tomlin, CDBG-DR Claims & Appeals Reviewer 11 Years	✓	✓	✓		✓	✓		✓		✓					✓		
Shaela Manross, CDBG-DR Admin Support 11 Years	Administrative support will assist across all program task areas																
Chloe Tucker, CDBG-DR Admin Support 7 Years	Administrative support will assist across all program task areas																

Denotes *Guidehouse* Employee; Denotes *Metric* Employee; Denotes *Greene Street Communications* Employee

3.7 Approach to Delivering Task Orders

Team Guidehouse's approach to executing each task area in the RFP is grounded in our proven task order management framework (). For every assignment, we deploy multidisciplinary teams tailored to the specific requirements and scale of each task order—drawing from a deep pool of experienced professionals with expertise in CDBG-DR, federal grant management, and disaster recovery. Leveraging our centralized TruePMO℠ structure, we coordinate resources, monitor progress, and maintain real-time visibility across all active projects. This structure allows us to rapidly mobilize, scale, and adapt our teams as DCR's priorities evolve, while upholding high standards of quality, compliance, and transparency. Through this flexible and responsive model, Team Guidehouse delivers targeted, effective solutions across all program areas, achieving DCR's objectives efficiently and with measurable results.

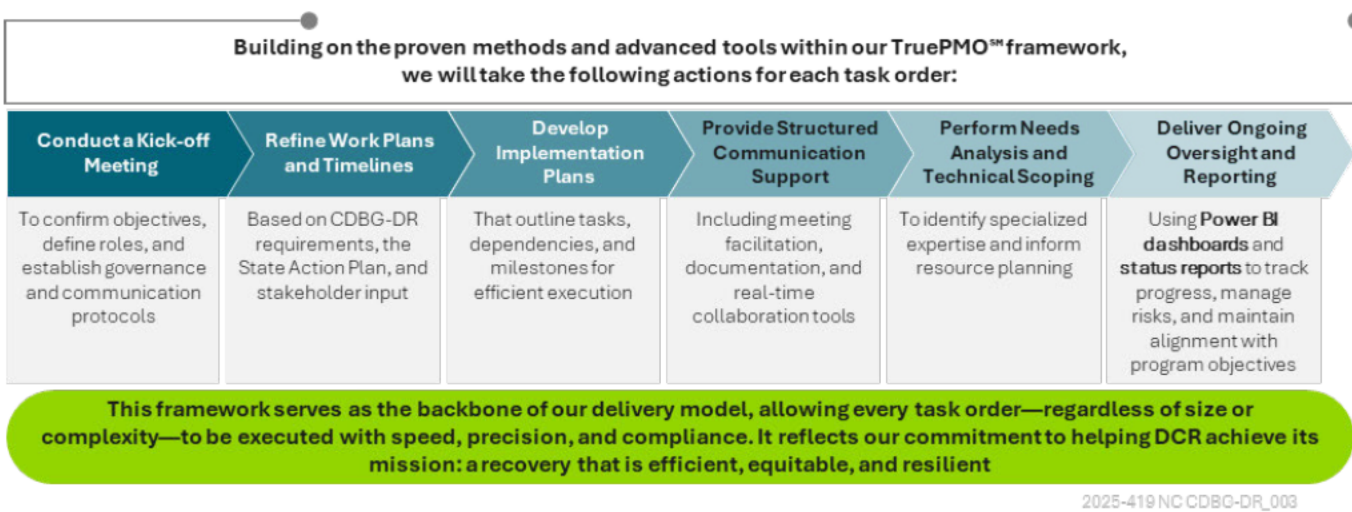

Figure 2. Task Order Framework

The sections that follow describe how Team Guidehouse will apply this task order-driven approach to each RFP task area, outlining our methods for producing the anticipated deliverables, including potential milestones, timing, and the specific tools our teams will use to support DCR's objectives.

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

Developing a robust framework for program administration requires more than compliance—it demands clarity, precision, and adaptability. Our approach is designed to provide DCR with comprehensive tools and guidance that not only meet regulatory requirements but also streamline operations and strengthen accountability. Each deliverable follows a phased timeline, incorporating stakeholder engagement, iterative drafting, and continuous improvement. The following sections outline the methodology for each component of this effort.

Spotlight Experience: Missouri's Department of Economic Development (DED) selected Guidehouse to develop policies and processes for CDBG-DR program administration in accordance with 2 CFR 200, train DED staff and CDBG-DR subrecipients on the developed items and provide guidance to DED staff and CDBG-DR subrecipients for grant administration capacity building. We developed policies and procedures in accordance with HUD requirements for the following programs: (1) Affordable Multifamily Rental Recovery program, (2) General Infrastructure program, (3) Mitigation Infrastructure program, (4) Infrastructure in Support of Housing program, (5) Homeowner Rehabilitation and Reconstruction program, (6) Housing Counseling program, and (7) Single Family New Construction program.

Program-Specific Policies

Our team will craft tailored policies for each CDBG-DR program area, including single-family housing repair, multifamily rental housing, commercial district revitalization, infrastructure and resilience projects, private roads and bridges, and small rental programs. These policies will reflect HUD regulations, DCR's Action Plan, and all applicable state and federal requirements.

The process begins in Month 1 with a comprehensive review of existing documentation and targeted stakeholder interviews to capture program objectives, operational constraints, and community priorities. This discovery phase establishes a strong foundation rooted in both regulatory mandates and local context.

In Month 2, we will draft initial policy frameworks that define program goals, eligibility criteria, funding limits, and compliance obligations. These drafts will undergo internal quality review and stakeholder validation to confirm alignment with program intent. By Month 3, final policies will be delivered in a structured format that promotes easy reference and integration into program operations. Our team will remain engaged beyond delivery, providing ongoing support to update and refine policies as new HUD guidance or local requirements emerge.

Program-Specific SOPs Detailing Required Workflows, Documentation Standards, and Quality Control Processes

To translate policy into practice, we will develop detailed Standard Operating Procedures (SOPs) for each program. These SOPs will provide step-by-step workflows, documentation standards, and quality control checkpoints to promote consistency and reduce compliance risk.

Using Microsoft Word for documentation and Visio for process mapping, we will create visual and narrative guides that are intuitive for staff at all levels. Development begins in Month 2 with high-priority programs such as single-family housing and infrastructure. Each SOP will incorporate HUD best practices, DCR-specific requirements, and lessons learned from similar programs nationwide.

By Month 3, SOPs for all active programs will be completed and validated through stakeholder review sessions. Our team will also provide training sessions to familiarize staff with the new procedures and will remain available for revisions as programs evolve or new compliance obligations arise.

Templates, Forms, and Checklists to Guide Eligibility Determinations, Benefit Calculations, Procurement Activities, and Records Management

Consistency in documentation is critical for compliance and audit readiness. To support this, we will design a comprehensive suite of templates, forms, and checklists that cover eligibility determinations, duplication of benefits analysis, benefit calculations, procurement documentation, and records retention.

These tools will be developed using Excel for calculations, Adobe Acrobat for standardized forms, and Neighborly Software for digital integration. Our design approach prioritizes usability, clarity, and alignment with HUD monitoring expectations.

Development begins in Month 2, with initial tools piloted in Month 3 to gather user feedback. Finalized versions will be delivered in Month 4, accompanied by training sessions and technical assistance. Our team will continue to provide updates as regulations change or as operational improvements are identified.

Standardized Reporting Structures for HUD, State, and Federal Reporting Requirements (e.g., DRGR, QPRs, Section 3, Fair Housing)

Accurate and timely reporting is essential for maintaining compliance and demonstrating program performance. We will implement standardized reporting structures that align with HUD's DRGR system, Quarterly Performance Reports (QPRs), Section 3 compliance, Fair Housing obligations, and other federal and state mandates.

Our team will leverage Snowflake for data integration, Power BI for visualization, and DRGR-compatible formats for submission. In Month 2, we will assess current reporting workflows and identify gaps in data collection and validation. Month 3 will focus on building and testing reporting templates and dashboards, followed by full deployment in Month 4.

Ongoing support will include quarterly reporting assistance, data validation checks, and coordination with DCR staff to maintain accuracy and timeliness in all submissions.

Written Closeout Procedures Outlining Project Completion, Financial Reconciliation, and Grant Closeout Documentation

Closeout is a critical phase that requires precision and thorough documentation. We will develop written procedures that guide project completion, financial reconciliation, and preparation of HUD-compliant closeout packages.

These procedures will include detailed checklists for verifying deliverables, reconciling expenditures, and confirming that all compliance obligations are met before final submission. Drafting will begin in Month 3, with final procedures delivered in Month 4.

Our team will provide hands-on support during the closeout phase, including technical assistance, file audits, and coordination with HUD and state agencies to facilitate a smooth and compliant transition.

Our methodology combines regulatory expertise with practical implementation strategies to deliver a complete operational framework for DCR's CDBG-DR programs. Each deliverable is developed through a structured, milestone-driven process that emphasizes clarity, accountability, and adaptability. With ongoing support embedded into every phase, we position DCR for success—not only in compliance but in building a transparent, efficient, and resilient recovery infrastructure.

3.7.2 Task 2 – Financial Compliance, Oversight, and Fraud Prevention

DCR's CDBGDR portfolio benefits from approaches that convert federal and state rules into day-to-day practices that are traceable, auditable, and easy for program teams to apply. Building on proven monitoring, compliance, and reporting methods in large, federally funded programs—and drawing directly from recent engagements in energy, transportation, housing, and disaster recovery—we outline below how each deliverable will be produced and operated within DCR's environment. The methods leverage risk-based monitoring, Uniform Guidance–aligned financial controls, DRGR ready reporting, and tech enabled analytics, all of which have been field tested on multibillion dollar portfolios and refined through training, templates, and repeatable workflows.

Spotlight Experience: Guidehouse was engaged by the State of South Carolina to support its COVID-19 response and recovery efforts. To maximize the State's allocation of funding, Guidehouse identified funding and eligibility requirements and developed strategies for the State's response using a current state assessment and prioritization evaluation based on funding. The team also established processes, policies, and procedures for the end-to-end grants management process which served as business requirements for a tech-enabled grants management platform that led to countless efficiencies. Guidehouse also configured, deployed, and integrated a Salesforce solution to enable these processes. The system facilitated tracking, management, monitoring, and reporting of expenditures and disbursements. Finally, Guidehouse concurrently supported the State with grant administration, including instituting compliance and audit-readiness practices.

Written policies for fund tracking, separation of CDBG-DR funds, and proper accounting

We will author a policy suite that governs chart of accounts design, segregation of CDBGDR funds, drawdown and cash management, allowability and allocability under Uniform Guidance, program income identification and use, and period end reconciliations between the general ledger and DRGR. The structure follows federal requirements in 2 CFR 200 and 24 CFR 570 and codifies workflows for voucher creation, budget controls, documentation standards, and records retention so that every transaction can be traced to an authorizing source and an auditable file. This approach mirrors financial management playbooks we have implemented for state energy and disaster recovery portfolios, including payment procedures, cost principles, and internal control designs aligned to COSO and federal expectations.

Policy drafting begins with a current-state review of fund flow, cost allocation, bank reconciliation cycles, and DRGR alignment. We then translate requirements into desk guides, crosswalks, and process maps that staff can follow with minimal ambiguity. Where DCR already uses grants systems or document repositories, we embed policy checkpoints within those tools and reference standard job aids for payment reviews, program income handling, and conflict-of-interest disclosures. Similar constructs have supported large CDBG-DR implementations, where Integrated Master Schedules, compliance manuals recognized by HUD, and public-facing dashboards were tied directly to finance and DRGR controls to promote transparency and audit readiness from day one.

Fraud, waste, and abuse prevention protocols and detection tools

We will stand up a fraud-risk program that integrates prevention, detection, and response, built on the U.S. GAO Framework for Managing Fraud Risk in Federal Programs and tailored to CDBG-DR processes from application intake through closeout. The method starts with a structured fraud-risk assessment that identifies inherent risks by program and process stage; maps preventive and detective controls to policies, workflows, and system checkpoints; and defines the audit trail required for triage, escalation, and recovery actions.

An AI-driven fraud prevention platform that ***seamlessly integrates cutting edge-technology****, is both efficient and effective, and is* ***well-suited for government agencies due to flexibility and value.*** *Currently deployed to flag > $1.5B in potential fraud and eligibility risk per month at multiple federal agencies.*

1 Data Enrichment & Orchestration	2 Rules Engine & AI/ML Fraud Alert Scoring	3 Identity & Behavioral Graphs	4 Integrated Case Management and Process Automation
• Pulls from multiple sources (public, private, party data) to fill gaps where agencies lack information • Leverages GH-proprietary tools and methods – Vital Audit, Dark Web Threat Intelligence, Fraud Typology Library	• Pre-configured rule sets identifying suspicious patterns in real time (verification and on-going authentication) • Dynamic AI/ML fraud scores that prioritize high-risk alerts to reduce workload	• Links entity relationships, identifies hidden associations, and flags anomalies • Provides a comprehensive picture of digital footprint to identify suspicious behavior changes	• End-to-end workflow for investigations, referrals, and recovery actions • Central repository enables seamless collaboration across teams • GenAI-enabled Fraud Insights aggregates case information
Improved Identity Verification and Risk Mitigation	Enhanced Alerting Precision and Accuracy	Develop Unique Insights and Uncover Fraud Rings	Increase Efficiency of Review and Agency Collaboration

Key Outcomes

- **70%** Reduction in fraud alert Volume from AI/ML
- **50%+** Investigation Process Efficiency Gains from GenAI
- **>1000%** ROI on Fraud Solution Implementation
- **+300%** Confirmed Fraud Detection

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Figure 3. AI-Driven Fraud Prevention

Detection capabilities layer data analytics and a configurable rules engine on top of casework. Identity verification, watchlist screening, network/link analysis, outlier detection, and risk scoring are configured to surface patterns early, with role-based case management that captures evidence, decisions, and referrals. Quarterly analytics refreshes and typology updates keep the rules current with observed behaviors. Training and governance materials—fraud risk framework, control matrix aligned to 2 CFR 200 Subpart D, and SOPs for prevention and detection—embed responsibilities across finance, program, and compliance teams without creating unnecessary friction for applicants or partners. This approach reflects practices we have applied across federal grants portfolios, including energy rebate programs and statewide disaster recovery initiatives that required rapid deployment of fraud mitigation controls while maintaining program throughput.

Monitoring plans and tools for financial oversight of subrecipients and contractors

We will operationalize a risk-based oversight program that targets effort where it matters most. Pre-award and onboarding assessments evaluate capacity, prior audit history, financial controls, and procurement practices, producing a tiered monitoring plan that sets frequency and modality (desk versus onsite) for each subrecipient and contractor. Standard instruments—entrance and exit protocols, financial testing checklists, documentation requests, sampling methods, internal controls walkthroughs, and verification steps for match, program income, asset tracking, and Section 3—guide every review and produce monitoring letters, schedules of questioned costs or concerns, and timebound corrective action plans owned by the monitored entity.

Execution draws on artifacts and methods proven on large CDBGDR engagements. These include subrecipient scoring matrices and risk assessment SOPs that standardize how risk ratings drive monitoring cadence; statistical sampling guidance adapted from AICPA practice for transaction testing; and site-based wage compliance procedures using tools such as LCP tracker for Davis Bacon reviews and onsite interviews. Issue logs, evidence repositories, and QA spot checks support consistency across cycles. This end-to-end framework has been applied at county and state scale to monitor infrastructure and housing programs, with HUD recognized exemplary practices such as risk-based plans, integrated schedules, and G ISenabled dashboards to track progress and documentation in real time.

Federal and State compliance reviews, including inspection of award approvals, reimbursement requests, and completed monitoring visits

We will staff a compliance-review function that validates program decisions and artifacts against federal and state requirements and confirms that monitoring activity is completed and effective. Award reviews verify eligibility determinations, environmental documentation, duplication-of-benefits analyses, underwriting or cost-reasonableness tests, and adherence to program-specific rules under 24 CFR 570 and applicable Federal Register notices. Reimbursement reviews test allowability and allocability under 2 CFR 200, procurement method and contract compliance, documentation sufficiency, and reconciliations to DRGR and the general ledger. Each review follows a standardized protocol for sampling, reviewer independence, working-paper structure, and escalation, and results in a memorandum that states conclusions, cites evidence, and sets remediation steps with owners and due dates.

The approach incorporates current Uniform Guidance updates effective October 1, 2024, including revised thresholds and definitions relevant to Single Audit applicability and pass-through responsibilities. Where applicable, we will validate that subrecipients subject to Single Audit have filed with the Federal Audit Clearinghouse and that DCR issues management decisions within the required windows; for entities below thresholds, we can stand up agreed-upon procedures engagements tailored to risk. These practices mirror methods used across state portfolios and in local CDBG-DR programs where internal policies, subaward terms and conditions, and compliance checklists were aligned to federal rules and periodically refreshed through meta-reviews after HUD monitoring.

Financial performance dashboards, KPI tracking systems, and corrective action procedures

We will deliver a performance management layer that gives leadership, finance, and program teams a single, governed view of obligations, expenditures, draw ratios, burn rate, unit completions, process cycle times, reimbursement backlogs, procurement throughput, monitoring coverage and closure rates, fraud-case volumes and outcomes, and corrective-action aging. The data model aligns DRGR exports, general-ledger feeds, grants-system records, monitoring results, and casework data; ingestion pipelines include validation and exception reporting so gaps surface before dashboards refresh. Visuals are built for role-based consumption in a BI platform with drill-through to transaction detail for rapid inquiry and audit response, following templates we have used to accelerate federal reporting on energy and disaster-recovery grants.

Corrective-action procedures are integrated with the analytics. Thresholds and alerts trigger management reviews, root-cause analysis, and documented plans with owners, milestones, and evidence of completion tracked in an issue log. For construction and infrastructure programs, we incorporate a construction-management dashboard that displays status, schedule, cost, certified-payroll and Section 3 reporting, and compliance checks; this format has supported city and county-scale CDBG-DR efforts where leadership required real-time visibility to mitigate schedule and budget risk. We pair the dashboards with concise user guides and clinics for DCR staff so teams can interpret metrics, navigate drill-downs, and use the visuals to drive decisions and on-time federal submissions.

Spotlight Experience: FEMA's Recovery Technology Programs Division engaged Guidehouse to provide Individual Identity Verification and Authentication (IDV&A) services to prevent fraud, waste, and abuse in disaster recovery programs. Guidehouse implemented its proprietary AI Driven fraud detection and prevention solution that combines LexisNexis IDV&A tools and data with Guidehouse flexible Business Rules Engine (“BRE”), pre-built application programming interface (API), and a suite of risk scoring, data analytics, reporting, network/link analysis, and artificial intelligence/machine learning (AI/ML) capability.

Each deliverable is produced as a living component of DCR’s operating model: policies that anchor compliant fund flow and DRGR tie-outs; fraud protocols that detect patterns early and document casework; risk-based monitoring that targets the highest-impact relationships; compliance reviews that validate award and reimbursement decisions against federal and state rules; and dashboards that translate data into action with documented corrective pathways. These methods have been proven across state energy portfolios and CDBG-DR recoveries—recognized by HUD and auditors alike—and they give DCR a durable framework for transparent, accountable recovery at scale.

3.7.3 Task 3 – Duplication of Benefits (DOB) Compliance

Duplication of benefits (DOB) compliance is a cornerstone of program integrity and a critical safeguard for CDBG-DR funds. Our approach is prevention-first, supported by automation and guided by risk-based principles. It combines HUD-aligned policy, robust data integration, standardized workflows, and a monitoring framework that is both practical and defensible. From day one, the design aligns with the grantee's Action Plan and HUD's Universal Notice, embedding compliance into every operational layer while maintaining speed and transparency.

Spotlight Experience: HUD as well as many other federal funding agencies such as FEMA have placed special emphasis on detecting and preventing the duplication of benefits caused by the reimbursement of expenses previously paid by another private or federal source. Over the past 5 years, Guidehouse's Financial Crime, Fraud, & Investigative Services (FFI) team has emerged as an industry leader in developing and implementing methods to detect and prevent fraud, waste, and abuse, including the duplication of benefits.

Written DOB Prevention Policies Aligned with HUD Guidance

The first step is to establish a governance framework that translates federal requirements into actionable program rules. We draft comprehensive DOB prevention policies that define assistance categories such as FEMA, SBA, NFIP, private insurance, philanthropic aid, and other public sources. These policies articulate benefit sequencing, treatment of unmet need, subrogation and recapture provisions, and documentation standards. Each policy is mapped to the corresponding process step and control point, creating a clear link between written guidance and operational execution.

The policy package includes applicant affidavits, subrogation language, and quick-reference job aids for staff. All documents are harmonized with the Action Plan and Universal Notice requirements and stored in a version-controlled repository for easy updates and audit readiness. This approach reflects best practices we have implemented in large-scale recovery programs, where policy clarity and accessibility reduced compliance risk and accelerated program delivery.

Timeline

By day fifteen, we complete a policy gap analysis and stakeholder interviews. By day thirty, a full draft of the DOB prevention policy package is delivered. By day forty-five, the final version is published, staff training is conducted, and the repository is live.

Data Matching Tools to Detect and Mitigate Potential DOB Risks

Our data strategy integrates multiple external sources—FEMA, SBA, NFIP, private insurance, prior CDBG allocations, and state or local programs—into a unified matching engine. This engine applies configurable rules to identify duplicative assistance and automatically reflects verified amounts in award calculations. Exception queues highlight conflicts or missing data, while dashboards provide real-time visibility into risk indicators and processing status. Every transaction is logged to create a defensible audit trail.

Security and governance are addressed from the outset. We define source lists, matching logic, retention periods, and access controls. Encryption, role-based permissions, and audit logs protect sensitive data while maintaining operational efficiency. This architecture has been deployed successfully in other disaster recovery programs, where it supported compliance with HUD and OIG reviews and reduced manual reconciliation effort.

Timeline

The first thirty days focus on data source mapping, match logic design, and security configuration. By day sixty, a minimum viable product is operational, matching core FEMA, SBA, and insurance data. By day ninety, production workflows, a published data dictionary, and a monitoring dashboard are fully deployed.

Templates, Forms, and Workflows to Support Consistent Eligibility Determinations and Benefit Calculations

We operationalize policy through standardized templates, forms, and calculators that guide eligibility determinations and benefit calculations. These tools apply sequencing rules, deduct duplicative sources, and enforce documentation requirements through compliance checklists and field-level validations. Rules are embedded in a configurable calculation engine—whether Excel-based, low-code, or integrated into the case management platform—with full audit logging for every decision.

Our library of templates includes application forms, award calculation sheets, QC checklists, and SOPs for intake, review, and approval. Each document references the applicable regulation and includes clear instructions for staff. Automated validations and multi-tiered review workflows reduce error rates and create a consistent applicant experience. This approach has been proven in prior engagements where standardized documentation and embedded controls supported clean HUD monitoring results and accelerated processing timelines.

Timeline

By day forty-five, the initial form and template suite is delivered. By day sixty, the award calculator and SOPs are deployed. By day seventy-five, updated versions incorporating stakeholder feedback and early operational insights are released.

DOB Processing and Compliance Management

DOB controls are embedded at three checkpoints: intake, pre-award, and pre-closeout. At intake, applicant attestations and structured questions capture potential duplication early, supported by real-time data matching. At pre-award, the calculation engine applies sequencing and unmet-need logic, deducts duplicative sources, and records reviewer rationale. At pre-closeout, a final verification confirms that no new duplicative assistance has been introduced before the case is archived.

The operating model integrates process, technology, and oversight. Dashboards track throughput, exception aging, and recapture exposure, while a structured recapture protocol addresses post-award discoveries. Training programs for staff and subrecipients cover every aspect of DOB compliance, from identifying external assistance to documenting decisions in the case file. This model has been applied successfully in other jurisdictions, reducing recapture risk and producing audit-ready files from the start.

Timeline

By day seventy-five, an end-to-end DOB processing playbook and case file structure are delivered. By day ninety, workflows are live in production. By day one hundred twenty, the first monthly performance report is issued, including metrics on processing speed, exception resolution, and compliance trends.

This integrated approach delivers a complete DOB compliance framework: written policies that align with HUD guidance, a data-matching engine that detects and mitigates risk, standardized tools that drive consistency, and operational workflows that embed compliance into every stage of program delivery. The result is a process that is practical, defensible, and capable of supporting timely assistance to beneficiaries while maintaining full audit readiness from day one.

3.7.4 Task 4 – Procurement Compliance and Monitoring

Spotlight Experience: For the City of Joplin, Missouri, we provided end-to-end procurement oversight for $158M in CDBG-DR funds, including drafting procurement SOPs, reviewing subrecipient RFPs, and conducting risk-based monitoring. Our compliance manual was recognized by HUD as an exemplary practice.

Transparent, fair, and compliant procurement is the backbone of CDBG-DR program delivery. Our approach builds a practical framework that links policy, documentation, and oversight into a single operating model, so DCR and its subrecipients can purchase goods and services quickly while meeting federal and state requirements and producing audit-ready files. The model draws on large-scale grants programs where we implemented monitoring frameworks, reviewer playbooks, sampling standards, and executive dashboards; it also incorporates 2024 updates to the Uniform Guidance and risk-based monitoring practices that federal reviewers expect to see in place.

Procurement policies and SOPs consistent with federal and state requirements

The work opens with a structured review of current procurement rules and practices across DCR and representative subrecipients, comparing them to 2 CFR 200, HUD guidance, and applicable state and local requirements. The gap analysis documents where methods, thresholds, and approvals diverge from federal standards and where conflict-of-interest, responsibility determinations, or price and cost analysis language needs tightening. The same diagnostic approach underpins our grants engagements for energy and disaster-recovery portfolios, where we align policy text to statute and then embed each clause into defined workflow steps and reviewer roles.

Policy development then codifies the full life cycle: market research and method selection; solicitation planning with clear evaluation factors; public notice and addenda control; receipt, opening, and evaluation procedures; negotiations where permitted; award documentation; and contract administration, modifications, and closeout. For construction procurements, the policy suite references labor standards administration, certified payroll collection, and wage-interview practices that field monitors will apply during project delivery. The structure mirrors checklists and monitoring guides we deploy on multi-program portfolios, giving reviewers a consistent playbook across micro-purchases, small purchases, competitive proposals, sealed bidding, and non-competitive awards when justified.

To keep policy current and traceable, we publish an indexed manual and desk guides in a version-controlled library, link each section to the governing citation and the corresponding approval point in the workflow, and schedule periodic meta-reviews alongside monitoring results. This approach is the same one we use to maintain policy libraries, separation-of-duties controls, and record handling protocols in statewide monitoring contracts.

Milestones and timing are front-loaded. By the end of Month 2, DCR receives the completed gap analysis and a redline plan that maps each variance to proposed text and a workflow control. By the end of Month 3, draft policies and SOPs are delivered for review; adoption and staff briefings follow immediately so the next phases—templates, tools, and oversight—launch against finalized rules.

Documentation standards for solicitations, contracts, procurement records, and cost reasonableness

A standardized documentation schema converts policy into files that auditors can follow without additional explanation. We produce solicitation templates for RFPs, RFQs, IFBs, and addenda; bidder communication logs; pre-bid meeting records; evaluation workbooks with weighted criteria; and bid tabulation forms that show arithmetic checks and responsiveness determinations. Each template cites the applicable rule and contains embedded instructions, so reviewers and selection committees know exactly what to capture and where it lives in the record.

Cost reasonableness receives special attention. We provide structured tools for independent estimates, price analysis, and cost analysis; we include models for labor, materials, equipment, overhead, and profit benchmarks; and we set out when a deeper cost analysis is required based on risk, complexity, or single-bid outcomes. For labor-standarded work, documentation incorporates certified payrolls, interview forms, wage determination references, and restitution workflows to resolve discrepancies.

These artifacts align with the compliance packages we use on construction programs that track prevailing wage and related requirements from procurement through pay applications.

Records management sits on a secure system of record with role-based access, encryption, audit logs, data masking for PII, and multi-factor authentication, so the right staff can retrieve the right file quickly while access is traceable for monitoring and audit. The platform design we use on other CDBG-DR portfolios includes structured data governance and backup and disaster-recovery provisions, which supports both daily operations and formal records requests without ad hoc scrambling.

Milestones and timing are tied to policy adoption. By the end of Month 3, DCR receives the first release of solicitation and contract templates, evaluation workbooks, and cost-reasonableness tools. By the end of Month 6, the full toolkit is finalized after pilot use with early procurements, and the document tree is published in the system of record with naming conventions and retention periods set for each artifact.

Monitoring tools and workflows for procurement oversight and compliance tracking

Oversight blends pre-award and post-award reviews with risk-based sampling, automated exception alerts, and dashboards. The monitoring plan defines reviewer independence, sampling logic by risk tier, and documentation standards for each test. Reviewers apply desk and on-site methods: pre-award checks confirm method selection, public notice, solicitation content, addenda control, debarment checks, evaluation scoring, price/cost analysis, and award rationale; post-award checks analyze contract administration, change orders, performance management, and payment support. This mirrors the Prepare-Monitor-Correct model we operate on cross-agency portfolios and ties directly to the documentation schema described above.

Sampling follows adapted audit practice. For populations above 250 items, we apply minimum sample sizes calibrated to the desired level of assurance; for smaller populations, we apply a percentage approach with documentation of the rationale and any expansions for cause. That guidance—used widely in our monitoring work—derives from established audit sampling practice and appears in our monitoring manuals as a practical table for reviewers.

Dashboards present procurement status, cycle times, exception queues, high-risk flags, and corrective-action aging, with drill-through to the underlying record in the system of record. The same dashboarding patterns are used across our grants programs for internal management and public transparency, with periodic summary reporting to leadership and program owners.

We also weave in the 2024 Uniform Guidance revisions that took effect on October 1, 2024, so procurement reviewers and subrecipients apply the latest definitions and thresholds as federal agencies implement them. Where a federal program applies the updated guidance to earlier awards, we document and communicate those changes and reflect them in both policies and monitoring tools.

Spotlight Experience: For the State of South Carolina's CDBG-CV program, Guidehouse established procurement review checklists to outline the requirements for the various types of applicable procurements. The checklist was utilized to confirm all documentation was obtained and all requirements of 2 CFR 200 were met.

Milestones and timing reflect a rapid rollout. By the end of Month 6, monitoring workflows, sampling guides, and reviewer checklists run in production; the first cycle of risk-based reviews is scheduled and initiated. By the end of Month 9, DCR receives a findings packet with observations, root-cause analysis, and corrective-action plans, plus updates to templates or policy text where systemic gaps surfaced.

Training, technical assistance, and change management

Templates and tools perform best when teams receive practical, role-specific training. We deliver multi-modal training and targeted office hours for DCR and subrecipients, covering method selection, conflict-of-interest controls, documentation assembly, evaluation scoring, price and cost analysis, and labor-standards administration for construction. Training draws on our program playbooks for federal reporting and compliance and incorporates job aids and recorded modules that new staff can use on demand. We also maintain an intake channel for procurement questions and pre-reviews, so subrecipients can validate packages before advertisement or award, reducing rework and findings.

The system of record's security and governance features support change management. Role-based access, audit logs, and MFA protect sensitive procurement and vendor data, while structured metadata and retention schedules promote fast retrieval during reviews, leadership briefings, or public-records requests. These capabilities are part of the standard platform configuration we deploy on disaster-recovery portfolios.

Training and TA begin in Month 2 alongside policy development, continue through toolkit rollout in Months 3–6, and then shift to refreshers aligned with monitoring results and regulatory updates. This cadence keeps guidance in step with real-world findings and reinforces the habits that produce strong, repeatable files.

Integrated timeline across deliverables

Months 1–2 focus on the policy gap analysis and remediation plan; Month 3 delivers draft policies and SOPs plus the first release of templates; Months 3–6 finalize documentation standards, cost-reasonableness tools, and records-management conventions; Month 6 launches production monitoring workflows and dashboards; and Month 9 closes the first monitoring cycle with findings, corrective-action plans, and targeted updates to policy and tools. This sequencing mirrors the phased stand-ups we run for statewide monitoring and compliance programs and aligns with the way federal reviewers evaluate progress across policy, documentation, and oversight.

3.7.5 Task 5 – Claims, Appeals, and Case Reviews

Standardizing how applications, appeals, exceptions, and other case-specific requests move from intake to decision is central to timely, high-quality program delivery and audit-ready files. Our approach creates one integrated operating model that combines clear procedures, role-based workflows, standardized documentation, and a monitoring and QA/QC layer—drawing on practices we have implemented across CDBG-DR, FEMA PA, and statewide grants portfolios, including documentation governance, risk-based reviews, and structured response playbooks for oversight inquiries.

Written procedures for case reviews, escalation protocols, and decision-making workflows

We begin with a current-state assessment of DCR and representative subrecipients' case handling—application intake, eligibility reviews, exception handling, reconsiderations, and appeals—to identify gaps against program rules (HUD/CDBG-DR and 2 CFR 200), existing policies, and field realities. The assessment mirrors methods we used to align program operations, case reviews, and documentation in multi-program recoveries, capturing where decision points, approvals, and recordkeeping need to be explicit for monitoring and audit.

Spotlight Experience: During Vermont's COVID-19 and flood recoveries, reviewers followed a written ladder for complex cost items: the frontline reviewer logged the issue and evidence, elevated to a senior analyst for interpretation, and a final approver recorded the rationale. The same ladder structure translates directly to CDBG-DR case decisions, where an eligibility dispute or exception moves through clear tiers rather than looping back to the applicant.

We then write procedures that cover end-to-end case flow: initial review standards; issue identification and RFI usage; exception categories with documentation requirements; reconsideration steps; formal appeal initiation, content, and timelines; and final decision issuance and archiving. The escalation ladder defines reviewer independence, criteria for second-level or subject-matter referral, and decision timelines matched to risk and complexity, reflecting review constructs we operationalized on large monitoring and compliance projects and FEMA PA portfolios.

Appeals procedures incorporate federal guidance and practical steps from prior engagements: building the record, drafting response templates, tracking statutory or program-set deadlines, and organizing exhibits for rapid submission, modeled on our support for formal appeals under 44 CFR §206.206 and high-volume COVID-19 and flood recoveries.

- **Tools we will use**
  - A case management system of record to route cases by status and risk; a version-controlled policy library mapping each step to its governing citation; and a workflow playbook with swim

lanes, role permissions, and SLAs. These elements mirror the policy-to-workflow traceability and records management patterns we operate on statewide CDBG-DR and PA programs.

- **Milestones & timing**
  - Days 0–15: current-state review sessions, inventory of existing SOPs, and gap log. Days 16–30: draft procedures and escalation framework. Days 31–45: publish final procedures, workflow diagrams, and a decision-making matrix; load to the policy library and system of record. This cadence aligns with the phased stand-ups we have executed to move from policy drafting to live operations without delay.

Standardized documentation tools—review checklists, decision logs, and applicant notification templates

We translate procedures into a documentation kit that creates complete, consistent, and traceable files. Review checklists are tailored to case type and program rules and include field-level validations, evidence prompts, and tie-outs to the governing citation—an approach we have used to produce clean files for HUD and state monitors across energy and disaster recovery portfolios.

Decision logs capture the issue, evidence, applied policy, analytic steps, and the approver's rationale, echoing the "working-paper" structure we use for FEMA PA cost validations and closeout packages where reviewers must rapidly follow logic and supporting evidence. Notification templates—approval, denial, RFI, appeal rights, extension notices—are written in plain language and configured for multiple channels (mail, email, SMS/IVR where applicable), incorporating accessibility and language access practices we employ on public-facing CDBG-DR programs.

We also include RFI libraries and exception typologies with standard responses and evidence lists, patterned after the targeted RFIs and exception queues we used to accelerate reimbursement, closeout, and oversight response cycles.

- **Tools we will use**
  - Template suite (checklists, decision logs, notifications) with embedded citations; RFI and exception code lists for consistent data capture; and a document taxonomy with naming conventions and retention schedules—consistent with documentation governance we deploy in large program offices.
- **Milestones & timing**
  - Days 31–45: deliver v1 toolset aligned to the finalized procedures. Days 46–60: pilot on a small case cohort and update based on reviewer feedback. Day 60: publish the toolkit and template guide; activate in the system of record with metadata for search and reporting.

Staff training materials to support consistent application of review procedures

Training spans role-based modules (intake specialist, reviewer, approver, QA/QC) with scenario-driven exercises: applying the checklist, drafting RFIs, documenting rationale in the decision log, and selecting the correct notification. We pair live sessions with recorded micro-modules, job aids, and office hours, applying the training model we used for cross-functional compliance rollouts and DRGR/reporting programs.

Training content also covers accessibility and language access practices for applicant communications and touchpoints—reflecting methods we deployed on island and mainland CDBG-DR programs where inclusive communication is essential for equitable access.

- **Tools we will use**
  - Curriculum map with learning objectives, slide decks, annotated checklists and decision-log exemplars, scenario workbooks, and quiz items to validate comprehension; a Q&A tracker to feed into SOP refinements and the FAQ library. This mirrors the knowledge-transfer approach we use when standing up program operations and compliance reviews at scale.
- **Milestones & timing**

– Days 30–45: develop curriculum and role-based materials in parallel with final procedures. Days 46–60: conduct initial trainings and post-session office hours; publish recordings and job aids for on-demand use. Day 75: refresher modules incorporating early monitoring insights.

Support for audit readiness and responses to HUD, state, or other oversight inquiries related to case determinations

We build audit readiness into day-to-day work. The case file structure, decision logs, and notification archive create a self-documenting record that aligns with reviewer expectations for independence, traceability, and sufficiency of evidence—practices we have repeatedly applied for HUD monitoring cycles, Single Audit support, and FEMA "Validate As You Go" reviews.

Spotlight Experience: During Massachusetts' COVID-19 response, an online tracking tool monitored costs, documents, and inquiry status across hundreds of projects, which allowed staff to answer Validate-As-You-Go questions with complete, indexed binders. In Harris County's Harvey recovery, a public-facing dashboard and standardized back-end files allowed leadership to track progress while case teams produced consistent, defensible packages for review.

Our oversight response kit includes: a standardized evidence index for case determinations; pre-formatted working-paper binders; a correspondence log; and a roles matrix for who drafts, who reviews, and who signs responses. For formal appeals or policy clarifications, we leverage the structured approach we use with state recipients, including timeline tracking, cross-references to policy and file artifacts, and preparation of exhibits.

We also align sampling, QA/QC, and meta-reviews to risk—borrowing from our monitoring playbooks where sample sizes scale with desired assurance and population size, and where findings feed back into procedure and tool updates each quarter.

- **Tools we will use**
  – Audit-ready case binder templates; oversight response templates; sampling guidance for file pulls; BI dashboards that expose case throughput, exception rates, RFI aging, appeal volumes, and closure timelines—with drill-through to underlying artifacts for rapid evidence compilation. These tools reflect dashboarding and documentation practices we have already deployed for state and local portfolios.
- **Milestones & timing**
  – Days 45–60: activate the oversight response kit and the audit-ready file structure; publish the sampling guidance. Day 90: complete the first internal meta-review and management report summarizing error trends, root causes, and remediation actions, with updates to procedures and templates where patterns appear.

Cross-cutting tools and governance

- **System of record and documentation governance**
  – We configure the system of record with role-based access, audit logs, encryption at rest and in transit, PII masking, and structured retention—controls we use on CDBG-DR and FEMA PA engagements to protect sensitive case data while keeping files usable for reviews, public records requests, and closeouts.
- **QA/QC and performance dashboards**
  – We implement a QA/QC tier that applies checklists and re-performance tests to a risk-stratified sample, and we publish dashboards with throughput, cycle time, exception aging, and corrective-action status—an approach we have used to manage intake, eligibility, and reimbursement workloads at scale.
- **RFI and exception management**
  – Standard RFI templates, exception typologies, and deadline tracking promote fast resolution and clean files. This mirrors the structured RFI approach we used to accelerate reimbursement reviews and closeouts during COVID-19 and flood recoveries.

DCR gains more than a set of documents and templates with this approach; it gains a disciplined way of working that converts policy into repeatable decisions, shortens cycle times, and produces files that stand up under scrutiny. The written procedures make every step explicit, the workflows route the right cases to the right reviewers at the right moment, the documentation kit captures the evidence and rationale in one place, and the QA/QC layer turns operational data into timely corrections rather than after-the-fact cleanups. Taken together, these elements create a path from intake to final determination that is fast, traceable, and defensible.

The value shows up immediately. Staff no longer debate process or re-create forms, applicants receive consistent communications, and leadership sees the same statuses and metrics across programs. When questions arise from HUD, state auditors, or other oversight bodies, the response kit and audit-ready file structure allow teams to assemble complete, well-organized records without pausing day-to-day work. Risks that once surfaced late now appear as trend lines and error patterns in the dashboard, with targeted fixes folded back into procedures and training on a regular cadence.

This is not theory; it is the same operating model our teams have used in high-volume recoveries and statewide monitoring efforts, adapted here to DCR's portfolio and timelines. By Day 60, cases will already be moving through the standardized flow with trained staff and live tools. By Day 90, the first meta-review will translate real data into refinements that make the process even faster and more reliable. The result is a durable framework that supports equitable service to applicants, clear decision-making for staff, and confident oversight for leadership.

We are ready to put this in motion. Upon approval, we will deliver the starter set—role-based review checklist, populated decision-log example, appeal response outline with labeled exhibits, and the scenario-based training deck—so DCR's teams can begin working in the new model immediately. This is a practical, production-ready solution that lets DCR move with speed today while building the documentation and controls that auditors expect tomorrow.

3.7.6 Task 6 – Action Plan Development and Amendments

An Action Plan is more than a compliance artifact; it is the operating blueprint that converts a federal allocation into targeted, data-driven programs with clear eligibility, budgets, and outcomes. Our role is to guide DCR from scoping to HUD submission with a cadence that balances speed, rigor, and authentic public input. We draw on a governance model used across city and state engagements, a repeatable unmet-needs methodology, HUD-recognized project ranking, and DRGR-ready exhibits so the Plan reads clearly, aligns to the Universal Notice, and is executable the day approval arrives.

Spotlight Experience: Following severe storms and flooding in July 2023, the State of Vermont received $67.8 million in CDBG-DR funding. Guidehouse was contracted to develop the Action Plan and recommend recovery programs. The team conducted a comprehensive unmet needs assessment across housing, infrastructure, and the economy, and completed a mitigation needs assessment using hazard maps, climate projections, and infrastructure data. Guidehouse also supported the expansion of HUD's Most Impacted and Distressed (MID) area designations to better target recovery resources. The Action Plan was submitted in June 2025 and approved by HUD in July 2025.

Draft Action Plan language, supporting documentation, and HUD submission packages

Work opens with a structured kickoff that confirms objectives, roles, decision gates, and a shared writing outline. We then run a rapid review of prior plans and allocations and assemble the analytical backbone—unmet needs across housing, infrastructure, and the economy; mitigation and resilience considerations; fair housing and civil rights analysis; and feasible program pathways. Data calls cover FEMA, SBA, insurance, and local sources and are paired with pre-disaster baselines and public indices such as the Social Vulnerability Index to focus resources on the most impacted and distressed communities, including HUD-identified MID areas. This analysis directly feeds the narrative, allocation tables, program designs, cross-cutting compliance language, and performance measures. A proprietary, criteria-based ranking method helps prioritize programs objectively and has been cited as exemplary practice on past CDBG-DR work.

As drafts mature, we build the supporting record—methods memos, data dictionaries, maps, and calculation workbooks—so reviewers can follow every assumption. In parallel, we prepare the HUD package: certification set, formatted attachments, and DRGR-compatible materials, along with an internal QA/QC pass keyed to the current Universal Notice and 2 CFR Part 200. This “author-and-assemble” rhythm mirrors recent state and county submissions where approval and launch activities moved without delay once HUD cleared the Plan.

- **Tools we will use**
  - We manage the work through a TruePMO governance tracker for milestones, risks, and decisions; Action Plan authoring templates refined on prior CDBG-DR engagements; unmet-needs and mitigation models with transparent assumptions; a compliance language library aligned to the Universal Notice; DRGR import worksheets and validation checks; and a redline workspace for consolidated DCR comments.
- **Potential milestones and generalized timing**
  - A typical Action Plan or substantial amendment follows a three-stage arc. Stage one is mobilization and baseline analysis, which typically completes within the first several weeks and produces the writing outline, data inventory, and a preliminary unmet-needs and mitigation view. Stage two is drafting and leadership alignment, which generally spans several weeks and produces a full public draft with allocation tables, program descriptions, and exhibits. Stage three is public comment integration, final edits, certification assembly, and DRGR packaging, which concludes within a similar multi-week window. Short-form amendments compress this schedule because the analytical baseline and exhibits already exist and require targeted updates.

Create and maintain public comment documentation and records of stakeholder engagement

Engagement runs alongside drafting rather than after it. We map stakeholders early—local governments, housing partners, infrastructure owners, community-based organizations, and advocacy groups—and publish a plain-language summary that previews program intent and tradeoffs. Outreach blends in-person and virtual formats, follows Section 508 accessibility standards, and provides translated materials for Limited English Proficiency populations. Hearings, office-hour sessions, and targeted briefings are scheduled on a predictable cadence, with sign-ins, remarks, written comments, and Q&A logs captured in a live tracker. We maintain a comment-to-response matrix that links each submission to the relevant Plan section and records how it was addressed—adopted, partially adopted with rationale, or not adopted with rationale—so reviewers and the public can see how feedback shaped the final text. After adoption, we publish the final matrix and archive the full citizen-participation record.

- **Tools we will use**
  - A Public Comment Tracker that assigns a unique ID to each submission and response; hearing and office-hours templates for agendas, sign-ins, and minutes; translation workflows for prioritized languages; accessibility checks for posted documents and meeting materials; and a communications calendar that coordinates notices and postings across channels. On prior engagements we also paired these records with public-facing dashboards to sustain transparency on spending and progress once programs launched.
- **Potential milestones and timing**
  - Engagement planning typically completes in the first couple of weeks with a stakeholder map, outreach calendar, and materials template set. A formal comment window then runs for several weeks during the drafting stage, with hearings and office hours staged throughout. The closing period focuses on reconciliation: the team finalizes the response matrix, assembles the citizen-participation appendix, and posts the hearing records before the package moves to HUD.

Integrated delivery rhythm

The work proceeds on parallel tracks—analytics, drafting, and engagement—so momentum never stalls. Governance uses a standing cadence of working sessions and executive reviews to surface tradeoffs early; policy text, tables, and exhibits update in lockstep as data matures; and every change is tagged to its source so the administrative record is clear and defensible. This is the same delivery rhythm we used on large, multi-program recoveries where Action Plans and amendments moved from concept to submission on schedule and with strong records for HUD review.

This is a practical, production-ready approach that converts allocation into action. The governance model keeps decisions moving, the unmet-needs and ranking methods channel funds to the right programs, the public record demonstrates how community voices shaped the result, and the DRGR-ready package puts DCR on a direct path to obligation and launch. These methods are not theoretical; they come from engagements where Action Plans and amendments were delivered on time, approved, and praised for clarity and traceability. With this team, DCR receives a Plan that reads well, withstands scrutiny, and—most importantly—sets up rapid program start-up the moment HUD gives the green light.

3.7.7 Task 7 – Needs Assessments, Market Analysis, and Geospatial Support

We convert complex, multi-source disaster and market data into a single analytical backbone that DCR can use to design programs, target resources, and communicate decisions with precision. The approach blends an early governance rhythm, a repeatable unmet-needs methodology that emphasizes HUD-identified Most Impacted and Distressed (MID) areas and social vulnerability, and a delivery model that pairs geospatial intelligence with clear narratives and dashboards suitable for leadership and the public. This methodology reflects playbooks we apply in Action Plan development and large CDBG-DR portfolios, including a TruePMO governance framework and a criteria-based project ranking method noted by HUD as exemplary practice in prior engagements.

Spotlight Experience: Guidehouse supported the City of Joplin by implementing an Integrated Master Schedule (recognized as "exemplary practice by HUD"), and a GIS-based reporting dashboard to enhance recovery management and financial tracking for grant projects. The team developed risk-based compliance plans and a capital prioritization framework, helping the city streamline monitoring and resource allocation. These efforts strengthened Joplin's recovery process and compliance with federal requirements.

Unmet needs assessments, market studies, gap analyses, and resource allocation reports

We begin with a structured mobilization that publishes a workplan, confirms roles, and defines data calls across housing, infrastructure, and economic recovery. The first pass quantifies unmet need by reconciling estimated damages with obligated and disbursed assistance, then layers demographic profiles, social vulnerability indicators, and HUD-identified MID geography so gaps are visible at neighborhood scale and aligned to the Universal Notice. This lens matters because grantees direct the vast majority of CDBG-DR to MID areas, and our assessments explicitly tag projects and needs to those geographies while documenting the method and sources used. We incorporate a criteria-based ranking model—developed on prior Action Plan work—to prioritize programs objectively and to show how equity, risk reduction, and benefit per dollar drive allocation choices.

Market intelligence completes the picture. We analyze housing inventory, rent and price trends, construction costs, labor capacity, and delivery constraints that can affect timing and award design. Where the data signals bottlenecks—such as trade shortages or materials spikes—we translate those findings into program design options, timeline adjustments, and procurement considerations so early choices avoid later overruns or slowdowns. This integration of needs and market signals mirrors the approach our teams used for county and state recoveries and Action Plan drafting cycles.

- **Tools we will use**
  - We operate a TruePMO governance tracker for milestones, risks, and approvals; authoring templates refined in Action Plan engagements; and scenario models that present alternative

allocation paths with transparent assumptions and data lineage. This toolset and method mapping are documented in our Action Plan responses and are designed to produce traceable, audit-ready exhibits alongside the narrative.

- **Potential milestones and timing**
  - Mobilization and baseline analysis complete in the initial weeks, yielding a preliminary unmet-needs view, an assumptions register, and an outline of allocation scenarios for leadership review. The next interval produces a draft resource-allocation report with market inserts, followed by a comment period and targeted revisions. The final package—narrative, tables, and methods memos—arrives within the subsequent planning window and is structured so content can drop directly into Action Plan sections, NOFA language, and program guidelines.

Geospatial data products—maps, visualizations, and dashboards for decision-making and public reporting

From the outset, records are geocoded and joined to tracts, block groups, parcels, floodplains, and MID boundaries so analysis is geographic, not just tabular. We publish two families of products. Internal planning views allow leadership to filter unmet need, pipeline, and spend by geography, program, and population characteristics, with drill-through to the underlying case or project record. Public-facing views simplify the story for residents and stakeholders, pairing ADA-conscious color palettes, plain-language tooltips, and downloadable map images with a concise narrative about where dollars are going and why. This visual transparency has supported trust and oversight in prior CDBG-DR programs, including a GIS-based reporting dashboard recognized by HUD as an exemplary practice during the City of Joplin recovery.

- **Tools we will use**
  - ArcGIS Pro and ArcGIS Online power geocoding, spatial joins, and hosted map layers; Power BI supports interactive visuals with executive summaries and drill-downs; and a documentation kit captures layer definitions, data refresh cadence, and accessibility checks for public materials. On recent recoveries we also paired dashboards with Snowflake-backed reporting for performance and near-real-time updates.
- **Anticipated milestones and timing**
  - Core basemaps and internal planning dashboards publish early, giving decision-makers a spatial lens on unmet need and candidate allocations. After content and translation review, public views go live with a matched set of static map products for media and community briefings. Thereafter, dashboards update on the same rhythm as the curated datasets, with snapshot retention so communications and audits can reference exactly what the public saw at any point in time.

Data integration from FEMA, SBA, NFIP, and local sources to support comprehensive needs assessments

We set data governance and security parameters, then inventory fields, refresh cycles, and known data quality issues across FEMA Individual/Public Assistance, SBA disaster loans, NFIP claims, and local property, permitting, and tax files. Feeds arrive via approved channels and are standardized into a common schema. Entity resolution links applicants, addresses, and projects across sources; records are geocoded and tagged to MID and other overlays; and quality routines reconcile outliers, fill critical nulls, and document every rule applied. Personally identifiable information remains protected through role-based access and masking, while curated views separate analytical truth from working tables. This integration pattern is the same one we describe in our Action Plan responses, with explicit attention to MID tagging and social-vulnerability overlays to support equity-forward allocation choices.

> **Spotlight Experience**: Guidehouse has successfully delivered similar analytics-driven solutions for major recovery programs nationwide. In Vermont, we completed a comprehensive unmet needs and mitigation assessment in just eight weeks, enabling the state to submit a HUD-approved Action Plan ahead of schedule.

- **Tools we will use**

- SQL-based ETL jobs handle extraction and standardization; a data catalog and dictionary define every metric and its source; and scheduled refreshes keep curated views current for analytics and dashboards. Where beneficial, we employ Python utilities for address standardization, entity resolution, and anomaly detection to improve match rates and confidence scores. The reporting layer can connect to Power BI and Snowflake for performance and reuse across oversight reporting needs described in our Maui portfolio work.

- **Anticipated milestones and timing**
  - Data-sharing agreements and field mappings finalize early, followed by an initial integrated dataset and a quality summary that flags confidence levels by source. Additional local feeds onboard on a rolling basis. Once stable, we lock a refresh cadence that matches decision needs—monthly for standard reporting with ad-hoc updates when policy shifts or major events require faster turns.

Integrated delivery rhythm

Integration, analytics, and visualization run in parallel. Governance meetings anchor decisions and tradeoffs; methods memos and data dictionaries travel with every output; and MID-aware, equity-focused mapping remains the through-line from the first baseline view to public reporting. This is the same rhythm we apply when drafting Action Plans and substantial amendments, where analytic exhibits, maps, and tables must be both compelling and defensible.

This is not a one-off report; it is a living, MID-aware data engine that moves from raw feeds to choices the public can see on a map and leadership can defend in a briefing. Within the first cycle, DCR receives a quantified unmet-needs picture, prioritized allocation scenarios, internal planning views, and a public dashboard that explains the path forward. As new data lands, the models and visuals update without restarting the process, and the documented methods carry straight into Action Plans, NOFAs, and quarterly performance narratives. The same playbooks have guided Action Plans and monitoring portfolios in cities and states nationwide, and they translate here into a practical pathway for equitable resource allocation and faster program launch.

3.7.8 Task 8 – Program Performance Monitoring and Evaluation

Team Guidehouse will deliver a performance management framework that not only meets HUD requirements but also provides DCR with practical tools and continuous support throughout the program lifecycle. Our approach addresses each deliverable in detail, integrating timing, tools, and a plan for sustained assistance.

Program-Specific Timelines, Milestone Tracking Tools, and Progress Reporting Templates

We begin by developing a Monitoring and Evaluation Plan during the first month of engagement. This plan will define program objectives, establish milestones, and outline escalation protocols. It will be aligned with DRGR reporting cycles and the State's System of Record to promote consistency and reduce duplication.

By Month 3, we will deploy Excel-based milestone trackers and reporting templates that are intuitive, audit-ready, and designed for easy integration with existing systems. These tools will capture critical data points such as project start and completion dates, financial drawdowns, and compliance checkpoints. For programs requiring advanced analytics, we can configure Power BI dashboards to provide real-time visualization of progress and risk indicators.

Our support does not stop at deployment. We will train DCR staff and subrecipients on how to use these tools effectively and provide ongoing technical assistance to adapt templates as program needs evolve. Quarterly review sessions will be facilitated to review progress, identify bottlenecks, and refine reporting practices.

Performance Metric Tracking Systems and Compliance Monitoring Tools

To measure program performance and compliance, we will implement a risk-based monitoring framework that focuses resources on high-impact programs such as multifamily housing, infrastructure, and activities serving low- and moderate-income populations. This framework will be operational by Month 3 and will include risk-based checklists, compliance scoring models, and dashboards that consolidate performance metrics into a single view.

> **Spotlight Experience**: For Frankin County, Ohio, we supported CDBG- and HOME-funded housing and community development programs by creating a monitoring framework built around clear milestones, standardized reporting templates, and quarterly review cycles. Our team developed tools that drew on existing county systems and HUD data requirements, which allowed performance tracking to be both efficient and compliant. We resolved the County's HUD audit findings and advised the County on program administration and eligible uses of federal funds.

Our team will conduct quarterly monitoring reviews to identify emerging delays, financial variances, and compliance gaps. These reviews will be documented in reports that highlight findings and recommend corrective actions. At the end of each program year, we will deliver a comprehensive evaluation report summarizing outcomes, risk trends, and improvement strategies.

Guidehouse will provide ongoing support by updating monitoring tools as HUD guidance changes, assisting with corrective action plans, and facilitating quarterly review sessions to keep stakeholders aligned on performance priorities.

DRGR Support and Execution

Guidehouse will provide continuous DRGR support throughout the program lifecycle. Our team will validate data, prepare quarterly performance reports, and troubleshoot system issues to maintain accuracy and timeliness. We will align DRGR submissions with internal reporting tools to streamline workflows and reduce administrative burden.

Templates will be designed so that data captured for DRGR can also feed the State's transparency platform, promoting accountability and public trust. Our team will remain available for technical assistance, including responding to HUD inquiries, updating templates as requirements evolve, and training staff on DRGR best practices.

Ongoing Support Across All Anticipated Deliverables

Our approach is built on sustainability. Beyond initial deployment, we will provide:

- **Training and capacity building** for DCR staff and subrecipients.
- **Quarterly review sessions** to assess progress and refine tools.
- **Technical assistance** for troubleshooting, template updates, and compliance questions.
- **Continuous improvement** through feedback loops and lessons learned.

This ongoing engagement transforms performance tracking from a compliance requirement into a management practice that drives accountability, transparency, and program success.

By delivering program-specific trackers, risk-based monitoring tools, and DRGR support—combined with continuous training and technical assistance—Team Guidehouse provides DCR with a performance management system that is practical, scalable, and built for long-term success.

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

Our strategy treats compliance as a core program function, not an afterthought. From the first day, we integrate civil rights, fair housing, labor standards, and historic preservation into every process. This approach creates contemporaneous documentation, reduces risk, and positions the County for successful HUD monitoring and closeout. Below, we describe how each deliverable will be developed, the milestones we will achieve, and the tools we will use to make compliance practical and sustainable.

Section 3 Compliance Tracking and Reporting

We begin by implementing HUD's labor-hours-based Section 3 framework under 24 CFR Part 75. During the first two weeks, our team will draft a concise Section 3 policy addendum and create standardized tools, including a labor-hours register, worker self-certifications, and business concern affidavits. These tools will be designed for easy integration into existing procurement and contract workflows. By the end of the first month, we will publish a quick-reference guide explaining what qualifies as a Section 3 worker or targeted worker, along with templates for subcontracting plans and good-faith effort documentation.

In the second month, we will introduce a structured tracking system using secure document libraries and validated spreadsheets to capture labor-hour data. Dashboards will provide real-time visibility into performance against HUD benchmarks, and quarterly roll-ups will be formatted for direct submission to HUD. By Month 3, we will deliver hands-on training for County staff and subrecipients, preparing them to maintain accurate records and respond confidently to HUD inquiries.

Spotlight Experience: In supporting the NYCHA Preservation Trust, our team provided financing and compliance technical assistance that incorporated Title VI, Fair Housing Standards, and Section 3 requirements into a new public housing modernization model. We developed compliance protocols, documentation processes and reporting tools that integrated civil rights and fair housing obligations directly into program delivery – experience that we will bring to North Carolina's recovery programs.

Fair Housing, Civil Rights, and Affirmatively Furthering Fair Housing (AFFH)

Fair housing and civil rights compliance will be embedded into every stage of program delivery. In the first two weeks, Team Guidehouse will issue a Fair Housing Documentation Guide that consolidates Title VI, Section 504, and other applicable requirements into a single, practical reference. This guide will include protocols for reasonable accommodations, language access, and accessibility standards, along with templates for public notices, sign-in sheets, and outreach documentation.

We recognize that federal fair housing policy has undergone significant changes in recent months. In April 2025, HUD officially repealed the Affirmatively Furthering Fair Housing (AFFH) rule, shifting responsibility for zoning and planning decisions back to local and state governments. While AFFH was referenced in the RFP, we understand that its regulatory status has changed. Team Guidehouse will work closely with DCR to align all fair housing activities with the most current federal guidance and statutory requirements at the time of service.

By the end of the first month, we will establish a centralized evidence library for outreach documentation and launch a Fair Housing Action Log to record proactive steps such as multilingual outreach, accessible meeting formats, and siting decisions that promote equity. In Month 2, we will complete the first outreach cycle using translated materials and accessible formats, capturing participation data in the log. Month 3 will feature comprehensive training for staff and subrecipients on civil rights compliance, language access, and applicable fair housing documentation.

Labor Standards and Davis-Bacon/Copeland Act Compliance

Our approach to labor standards compliance is preventive and integrated into the payment process. From the outset, we will issue a Labor Standards Handbook that outlines Davis-Bacon, Copeland Act, and CWHSSA requirements, along with a draw-time checklist for payroll verification. During the first month, we will align contract clauses with federal requirements and compile applicable wage determinations. We will also create templates for certified payroll review, wage interviews, and restitution tracking.

In the second month, we will begin reviewing certified payrolls alongside draw requests, validating classifications, fringe benefits, and apprentice ratios. Field interviews and site visits will supplement desk reviews, creating a robust audit trail. Monthly dashboards will summarize payroll compliance trends, while quarterly reviews will cross-check payrolls, interviews, and progress billings.

Documentation for CDBG National Objectives

Every CDBG-funded activity must meet a National Objective, and our team will provide a clear framework for documenting compliance from day one. In the first two weeks, we will publish a National Objectives Playbook that explains evidence standards for activities benefiting low- and moderate-income persons, addressing slum/blight conditions, or meeting urgent needs. We will also create standardized file structures and model memos for service area determinations, blight certifications, and urgent need justifications.

By the end of the first month, we will map data fields to HUD's Disaster Recovery Grant Reporting (DRGR) system and conduct a pilot Quarterly Performance Report (QPR) using sample activities. In Month 2, we will roll out the file architecture across all active activities and hold a working session with program leads to validate evidence sufficiency. Quarterly, we will conduct pre-QPR peer reviews to confirm that narratives and supporting documentation align with HUD requirements.

Historic Preservation and Section 106 Compliance

Historic preservation compliance will be addressed early to prevent delays and maintain regulatory adherence. In the first two weeks, we will issue a Section 106 Handbook with standard consultation letters, a project review form, and a notice calendar. We will also configure templates for Environmental Review Records (ERRs) in HUD's HEROS system. Weeks three through six will focus on initiating consultations with the State Historic Preservation Office (SHPO), Tribal Historic Preservation Offices (THPOs), and other stakeholders. We will document all correspondence in a consultation log and prepare effect determinations and mitigation agreements where necessary.

By Month 3, we will finalize effect findings, execute Memoranda of Agreement (MOAs) or Programmatic Agreements (PAs) as needed, and publish required public notices. These steps create a defensible record that satisfies HUD and Advisory Council on Historic Preservation requirements.

Ongoing Support and Monitoring

Our commitment extends beyond initial implementation. We will conduct quarterly compliance reviews across all domains—Section 3, civil rights, labor standards, National Objectives, and historic preservation—using a structured sampling methodology and risk-based prioritization. Each review will produce a concise findings memo with corrective actions and timelines. We will also maintain a live compliance dashboard for County leadership, highlighting key metrics such as Section 3 labor-hour performance, payroll exception rates, outreach coverage, and ERR status.

Annual reporting will culminate in a comprehensive Compliance and Equity Report that consolidates progress across all compliance areas and demonstrates alignment with the Action Plan's goals of transparency, equity, and accountability. In addition, our team will provide technical assistance on emerging HUD guidance, policy updates, and audit preparation, ensuring the County remains ahead of regulatory changes.

This approach delivers more than compliance—it builds a sustainable framework for accountability and equity. By embedding requirements into daily operations, providing practical tools, and maintaining rigorous oversight, we reduce risk, accelerate program delivery, and leave the County with a system that is audit-ready from day one through closeout. Our team's experience with CDBG-DR programs nationwide, combined with proven processes and clear milestones, gives the County confidence that compliance will not only be achieved but will strengthen the overall success of its recovery programs.

3.7.10 Task 10 – Audit Readiness and Monitoring Support

Guidehouse views audit readiness and monitoring support as a proactive discipline that safeguards compliance and strengthens program credibility. We believe readiness is not a one-time event but an ongoing practice embedded in every operational layer. For DCR, this means transforming monitoring and audit preparation into a structured, forward-looking process that anticipates risks and reinforces accountability. Our approach leverages decades of experience managing CDBG-DR and CDBG-MIT programs, deep knowledge of 2 CFR 200, and proven tools that withstand HUD and OIG scrutiny.

Readiness Review Tools and Checklists

The first step in building confidence for monitoring visits or audits is creating a structured readiness framework. Our team will develop a comprehensive suite of review tools and checklists that mirror HUD's monitoring protocols and Single Audit standards. These tools will cover every compliance domain—eligibility, procurement, financial management, environmental review, labor standards, and civil rights—ensuring that every file tells a complete and defensible story.

We begin by conducting a rapid diagnostic of DCR's current documentation practices and system workflows. This informs the customization of our readiness checklists, which will be designed for both desk and onsite reviews. Each checklist will include clear instructions, regulatory citations, and evidence requirements, reducing ambiguity and accelerating preparation. To make these tools actionable, we will embed automated status indicators and risk flags, allowing staff to quickly identify gaps and prioritize remediation.

Spotlight Experience: For New York's Office of Resilient Homes and Communities, Guidehouse prepared the agency for HUD monitoring reviews and audits by identifying and mitigating potential noncompliance and ensuring that disbursements aligned with federal requirements. We created monitoring checklists to verify that program activity matched policies and procedures, reviewed program files, and implemented corrective actions while also supporting internal audit reviews. Working with the Internal Auditor, our analytics team developed a risk-based methodology to detect data anomalies including patterns that produced negative award balances and selected targeted samples for manual validation. These efforts uncovered systemic root causes, quantified the impact on award balances, and provided actionable insights into how applicants used state funds during rebuilding.

- **Milestones and Timing**
  - **Weeks 1–2:** Complete a gap analysis of existing documentation and monitoring protocols.
  - **Weeks 3–4:** Deliver draft readiness checklists for internal review, covering program files, DRGR data, and subrecipient monitoring records.
  - **Month 5:** Finalize tools and conduct a readiness workshop to train staff on their use.
- **Tools we will use**
  - Excel-based readiness trackers with automated compliance scoring.
  - HUD-aligned monitoring checklists for desk and onsite reviews.
  - Risk-based sampling templates for file testing.

Draft Responses to Monitoring Reports, Audit Findings, or Compliance Inquiries

When HUD or an auditor issues a monitoring report, the clock starts ticking. Our team specializes in crafting responses that are clear, evidence-based, and aligned with federal expectations. We start by dissecting each finding to identify root causes and regulatory references. Then, we draft a response that not only addresses the issue but demonstrates corrective action and systemic improvements.

Our process includes building an evidence matrix that links each response to supporting documentation, ensuring completeness and accuracy. We also maintain a library of standard response templates for common issues such as procurement, duplication of benefits, and labor standards, enabling rapid turnaround without sacrificing quality.

- **Milestones and Timing**
  - **Within 5 business days of request:** Provide a response outline with regulatory citations and required documentation.
  - **Within 10 business days:** Deliver a full draft response package with exhibits and compliance narrative.
  - **Ongoing:** Maintain a repository of response templates and language for recurring issues.
- **Tools we will use**
  - Response templates aligned with HUD's monitoring report structure.
  - Document request logs and evidence matrices to track submissions.
  - Quality control checklist to validate completeness before submission.

Corrective Action Plans and Tracking Tools

Corrective actions are more than a compliance requirement—they are an opportunity to strengthen internal controls and prevent repeat findings. Our team will design Corrective Action Plans (CAPs) that are specific, measurable, and time-bound, with clear accountability for each step. Each CAP will include root cause analysis, immediate remediation steps, and preventive measures to address systemic issues.

To track progress, we will deploy a dynamic dashboard that provides real-time visibility into CAP status, highlights overdue items, and generates summary reports for leadership. This approach transforms corrective action from a reactive exercise into a structured improvement process.

- **Milestones and Timing**
  - **Within 10 business days of findings:** Draft CAPs with root cause analysis and mitigation strategies.
  - **Month 2:** Launch a corrective action tracking dashboard with automated alerts for upcoming deadlines.
  - **Quarterly:** Provide CAP status reports to leadership, highlighting trends and systemic risks.
- **Tools**
  - Corrective Action Plan templates with root cause and mitigation fields.
  - Excel-based or Power BI dashboards for CAP tracking and reporting.
  - Risk heat maps to prioritize high-impact corrective actions.

Ongoing Support and Monitoring

Our commitment does not end with deliverable handoff. We will provide continuous monitoring support through quarterly compliance reviews, mock audits, and technical assistance. Each review will produce a concise findings memo with corrective actions and timelines. We will maintain a live compliance dashboard for leadership, summarizing key metrics such as open findings, CAP status, and readiness scores. Annual audit readiness reports will consolidate progress and identify emerging risks, ensuring DCR remains prepared for HUD or OIG reviews at any time.

Our approach transforms monitoring and audit preparation from a reactive scramble into a disciplined, proactive process. By delivering practical tools, rapid-response capabilities, and robust corrective action frameworks, we help DCR not only clear findings but build a culture of compliance that withstands federal scrutiny and accelerates program success.

3.7.11 Task 11 – Technical and Engineering Support for Infrastructure and Housing Projects

Disaster recovery programs require more than technical skill; they demand precision, urgency, and full alignment with federal and local requirements. Every day of delay prolongs hardship for communities waiting for safe housing, resilient infrastructure, and economic recovery. Team Guidehouse applies a proven, milestone-driven methodology that converts complex regulations into clear, actionable steps. Our approach accelerates delivery, eliminates compliance risk, and maximizes the value of every recovery dollar. With decades of experience managing CDBG-DR programs nationwide, we move projects from concept to completion without costly missteps or audit findings.

Reviews of Engineering Plans Prepared by Subrecipients

Our process starts with a collaborative scoping session to confirm objectives and gather all relevant documentation. Within 15 business days of receiving plan sets, licensed engineers complete a comprehensive review for constructability, code compliance, and alignment with CDBG-DR and local requirements. Using Bluebeam Revu for precise digital markups and Procore for version control, we deliver annotated plans and a concise review memo that highlights required corrections and value-engineering opportunities so projects advance quickly and confidently to the next phase.

Ongoing support. After the initial review, our engineers host working sessions to resolve comments to disposition, update markups as revisions are submitted, and participate in pre-bid RFIs to avoid downstream ambiguity. We maintain a living comment log in Procore, reconcile outstanding issues before procurement, and provide ad hoc design-assist checks during early construction when field conditions prompt minor plan clarifications.

Review or Development of Cost Estimates

Accurate estimating underpins compliance and budget discipline. Within 10 business days of plan approval, estimators develop or validate detailed cost models using RSMeans and Xactimate, calibrated with local market data. Each estimate includes transparent assumptions, productivity factors, and contingency logic that meet 2 CFR 200 cost reasonableness standards. The package supports procurement, contracting strategy, and DRGR budgeting.

Ongoing support. We refresh estimates at key gates—final design, pre-award, and significant change orders—and provide market checks when bid tabs arrive. During construction, our team evaluates proposed change orders for scope validity and pricing accuracy, recommends value-engineering alternates where appropriate, and updates the forecast-to-complete so leadership can track cost exposure against contingency in real time.

Review or Development of Feasibility Studies

For requested studies, we deliver action-oriented reports within 20 business days. Each study triangulates technical feasibility (site readiness, utilities, constructability), financial feasibility (CapEx, O&M, lifecycle sensitivities), and regulatory feasibility (permitting, environmental pathway under 24 CFR Part 58, floodplain/wetlands constraints, labor standards). We apply GIS to visualize constraints and alternatives, and we close with a clear go/no-go, preferred option, and an implementation roadmap that sequences environmental review, permits, procurement, and construction to the Integrated Master Schedule.

Ongoing support. As conditions evolve, we update feasibility assumptions, refresh the business case, and support briefings with elected officials and the public. Where a recommended option moves forward, our team drafts scopes for preliminary engineering, prepares artifacts that feed the Environmental Review Record (ERR), and supports grant applications or braiding with other funding sources.

Compliance Assessments for Infrastructure and Mitigation Projects

Compliance is integrated at design completion, procurement, construction, and closeout. We confirm the environmental pathway under 24 CFR Part 58 and current floodplain management rules, embed labor standards and Section 3 in procurement documents, and set up certified payroll monitoring through LCPtracker. During construction, our specialists conduct wage interviews, reconcile payrolls, and track Section 3 labor hours and outreach. At closeout, we reconcile environmental mitigations, labor standards, and Section 3 documentation so files are complete and audit-ready.

Ongoing support. We provide recurring staff training for subrecipients and contractors, spot-check files before HUD monitoring, and prepare responses to monitoring letters or OIG inquiries. When regulations or guidance shift, we update checklists, contract templates, and job aids, then brief project teams so field practices align with the latest requirements without disrupting progress.

Feasibility Analysis of Infrastructure, Economic Development, and Housing Projects

For portfolio-level decisions—such as evaluating trade-offs between stormwater upgrades, business recovery grants, or housing production—Team Guidehouse delivers targeted, data-driven analyses within 15 business days of initial data collection. Our approach integrates economic impact modeling, resilience co-benefits, equity outcomes, and lifecycle sustainability to support informed decision-making. Each analysis culminates in a board-ready recommendation that outlines funding strategies, permitting and environmental pathways, and schedule logistics, all while maintaining strict compliance with HUD and Uniform Guidance.

Our team includes seasoned housing finance experts who bring deep experience in multifamily development, public-private partnerships, and feasibility analysis. In Travis County, for example, we supported the County's affordable housing initiatives by conducting due diligence and feasibility reviews across 11 multifamily projects. This work helped the County assess financial viability, regulatory alignment, and long-term sustainability—ultimately guiding investment decisions that balanced affordability, resilience, and community impact.

By combining technical rigor with practical insight, Team Guidehouse equips DCR with the tools to make strategic, transparent, and equitable portfolio choices that advance recovery goals and maximize public benefit.

Ongoing support. We convene quarterly portfolio reviews to re-rank projects as costs, hazards, or community priorities shift. Our team tracks external funding opportunities, proposes re-phasing when it shortens the critical path, and prepares concise decision memos when tradeoffs among programs arise.

Construction Progress Inspections of Infrastructure, Economic Development, and Housing Projects

Inspections occur at mobilization, 30%, 60%, 90%, and closeout. Construction managers document progress, quality, and compliance in real time using mobile forms and Procore field tools; reports—with photos, corrective actions, and percent-complete recommendations—publish within 48 hours. This cadence promotes early issue detection, tight punch lists, and faster closeout.

Ongoing support. Between milestones, we track open issues to resolution, review pay applications for alignment with field progress, and participate in schedule risk reviews when slippage appears. Post-substantial completion, we assist with warranty walk-throughs, confirm O&M turnover packages, and support claims avoidance or resolution if disputes surface.

Program-Wide Controls and Technology

All deliverables operate within a single Integrated Master Schedule (IMS) that connects reviews, estimates, feasibility assessments, compliance checkpoints, and inspections to procurement and construction milestones. The IMS is updated weekly, with leadership dashboards published regularly and documentation stored in a secure cloud repository to support transparency and audit readiness.

Our technology stack—including Bluebeam, Procore, RSMeans, Xactimate, ArcGIS Pro, and LCPtracker—supports precision, collaboration, and compliance across both office and field operations. However, these tools are only as effective as the professionals who use them. Team Guidehouse pairs each platform with experienced subject matter experts in cost estimation, geospatial analysis, construction oversight, and regulatory compliance. For example, RSMeans provides standardized cost data, but our estimators apply local context, market conditions, and project-specific variables to produce accurate, actionable estimates. Similarly, ArcGIS Pro enables spatial analysis, but our planning and housing experts interpret the data to inform siting decisions, equity impacts, and environmental considerations.

For federal reporting, our project and activity structures are aligned to DRGR from the outset, allowing quarterly reporting and closeout to proceed smoothly without rework. This disciplined approach is more than a method—it reflects our commitment to delivering every review, estimate, analysis, and inspection on time, on budget, and in full compliance.

Team Guidehouse has applied this model across some of the nation's largest and most complex CDBG-DR portfolios. By combining technical excellence with experienced personnel and robust controls, we convert recovery dollars into resilient infrastructure, thriving businesses, and safe, durable housing—ready to begin on day one in North Carolina.

3.7.12 Task 12 – Training, Technical Assistance, and Capacity Building

Delivering compliance training, program support, and transparency tools for a complex recovery program requires more than technical knowledge—it demands a structured, adaptable approach that builds capacity, reduces risk, and promotes accountability across all stakeholders. Guidehouse brings decades of experience supporting state and local governments with federally funded programs, combining instructional design expertise with advanced technology solutions. Our methodology is grounded in **ADDIE principles—Analyze, Design, Develop, Implement, and Evaluate**—a widely recognized framework for creating effective learning programs. This model allows us to systematically assess needs, design targeted content, develop engaging materials, implement training across multiple delivery channels, and evaluate outcomes for continuous improvement. Each deliverable is tied to clear milestones, supported by modern tools, and designed for sustainability so that DCR staff, subrecipients, and partners can confidently execute their roles.

Regulatory Compliance Training Sessions for DCR Staff, Subrecipients, and Partners

We begin with a comprehensive training needs assessment to identify audience segments and compliance priorities. Our team then develops a curriculum that blends in-person workshops, virtual webinars, and on-demand eLearning modules, using real-world scenarios to make content practical and engaging. Training sessions incorporate interactive exercises, knowledge checks, and role-based examples to reinforce learning.

The rollout begins with a pilot session within the first six weeks, followed by a full training calendar launched by Day 60. Sessions are delivered through MS Teams or Zoom, with recordings and supplemental materials hosted on a SharePoint-based Training Resource Hub. Feedback is collected through MS Forms and analyzed to refine future sessions.

Spotlight Experience: The Federal Emergency Management Agency (FEMA) Enterprise Data and Analytics Modernization Initiative (EDAMI) required assistance training and upskilling the workforce in both Tableau and Databricks to best leverage the agency's new enterprise analytics platform, the FEMA Data Exchange (FEMADex). Following ADDIE principles, Guidehouse has designed a comprehensive Training Portal featuring role-based learning paths with access to custom-built training materials for FEMADex platform components. These include video tutorials, practical hands-on exercises, quizzes, and demos. Guidehouse also travels to regional offices and disaster site locations to deliver in-personal trainings in an operational context. This support has promoted strong user adoption agencywide, with the userbase growing from 100 to 1000 users.

Ongoing support includes quarterly refresher sessions, monthly office hours, and rapid-response updates when regulations change. This continuous learning model keeps staff and partners aligned with evolving compliance requirements.

Updated Training Materials, Guidance Documents, and Instructional Resources

Guidehouse develops modular, user-friendly resources that translate complex regulations into actionable steps. These include compliance guides, SOPs, checklists, and templates designed for quick reference and easy adoption. Materials are built using design thinking principles and formatted for accessibility, with clear language and visual cues.

All resources are centralized in a Training Resource Hub with intuitive navigation and version control. Updates are published within 15 business days of regulatory changes, and users receive notifications through the portal and email alerts. This approach creates a living library that evolves with program needs and regulatory updates.

Application Intake Support, Eligibility Review Assistance, and Program Interpretation Resources

Our team stabilizes the intake process by mapping workflows, creating SOPs, and deploying digital tools for tracking and reporting. We implement risk-based eligibility review protocols and provide decision trees and job aids to guide staff through complex determinations.

Applications are tracked in SharePoint or Salesforce, with dashboards in Power BI providing real-time visibility into intake volumes, processing times, and error rates. A Knowledge Base captures program interpretations and FAQs, updated continuously as new guidance emerges.

Ongoing support includes live office hours, a dedicated helpdesk, and escalation protocols for complex cases, allowing staff to make accurate and timely eligibility decisions.

Tools to Promote Transparency, Reporting, and Accountability

Transparency is achieved through interactive dashboards and reporting templates that track training participation, application processing, and compliance performance. We configure Power BI or Tableau dashboards for internal monitoring and create a public-facing transparency page for stakeholders.

A secure SharePoint repository houses all guidance documents, training materials, and compliance reports, while an issue-tracking system logs inquiries and resolutions. Dashboards refresh on a regular cadence, and quarterly performance reviews highlight trends, risks, and corrective actions.

Ongoing support includes continuous dashboard enhancements, KPI refinement, and integration of new data sources as programs evolve.

Our approach combines structured milestones, modern learning design, and robust digital tools to deliver a comprehensive solution for compliance training, intake support, and transparency. By embedding adaptability and continuous improvement into every deliverable, Guidehouse helps DCR strengthen internal capacity, reduce compliance risk, and maintain public trust. This is not a one-time engagement—it is a partnership designed to sustain program success and position DCR as a model for effective, accountable disaster recovery administration.

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

Team Guidehouse's approach to relocation program development is structured to deliver a process that is compliant, transparent, and efficient—meeting HUD's CDBG-DR relocation requirements and standing up to monitoring and audit review. Drawing on our experience administering voluntary buyout and acquisition projects in Louisiana, Texas, and Florida, we bring a deep understanding of URA timing requirements, grievance procedures, and documentation standards.

Phase 1: Policy and SOP Development

Within the first 15 business days of task order issuance, we will draft comprehensive relocation policies, procedures, SOPs, and workflows tailored to DCR's program structure and North Carolina's Action Plan. These documents will define eligibility criteria, benefit determination methodologies, grievance procedures, and documentation standards. Drafts will be reviewed with DCR for feedback and approval. All policy documents will be managed and version-controlled using SharePoint and Neighborly Software, providing accessibility and audit readiness from day one.

Phase 2: Technical Guidance for System of Record

Within 10 business days of policy approval, our team will provide technical guidance to configure DCR's System of Record (SOR) for relocation compliance. We will map required data fields, process flows, and document retention protocols to capture notices, eligibility determinations, benefit calculations, and case file documentation. Our experience integrating NEPA and URA documentation into county grants management platforms—such as Collier County, FL—positions us to streamline compliance and reporting.

Spotlight Experience: For the State of Vermont, our team serves as the primary point of contact for applicants, guiding them through every step of the relocation process—from issuing General Information Notices and Notices of Eligibility to coordinating 90-Day Notices, relocation planning, and assistance with replacement housing and moving expenses. We implement robust documentation strategies, including URA trackers, standardized templates, and internal QA/QC protocols, to maintain clear audit trails and reduce compliance risk. This approach has supported over 140 households through the DOB process and successfully relocated 36 households, all while meeting milestones, staying within budget, and earning client recognition for responsiveness, regulatory expertise, and adaptability.

Phase 3: Application Review Tools

To support accurate and timely eligibility and benefit determinations, we will deliver application review tools—including checklists, calculators, and templates—within 10 business days of policy approval. These tools guide staff through the review process, reduce errors, and document every step of eligibility and benefit calculation. Our Excel-based calculators and digital checklists, integrated with the SOR where possible, have been recognized as best practices during HUD monitoring in Louisiana.

Phase 4: Required Notices, Monitoring, and Corrective Action

Our team will prepare all required URA/TRA notices—such as General Information Notices, Notices of Eligibility, Move-in Notices, and Notices of Non-Displacement—and deliver templates and compliance monitoring tools within 10 business days of policy approval. We will maintain a compliance monitoring calendar and use digital dashboards to track timely delivery of notices, monitor ongoing compliance, and document corrective actions. When issues arise, we provide resources and support DCR in responding to HUD or OIG inquiries.

Phase 5: Training and Capacity Building

Within 20 business days of policy approval, we will deliver targeted training materials and sessions for DCR staff, subrecipients, and program partners. Training will cover URA/TRA requirements, documentation standards, SOR workflows, and grievance procedures. We use a combination of live workshops, recorded modules, and job aids to build capacity and promote consistent application of policies. For example, our training program for relocation and buyout staff in Joplin, MO, resulted in a 95% compliance rate on first-pass HUD file reviews.

Ongoing Monitoring and Support

Throughout program implementation, our team will conduct monthly compliance reviews and provide quarterly reporting to DCR. We use digital dashboards and tracking logs to monitor notice delivery, benefit determinations, and grievance resolution, supporting proactive compliance management and audit readiness.

By applying this structured, milestone-driven approach and leveraging advanced tools, Team Guidehouse will deliver a relocation program that is compliant, transparent, and responsive to the needs of displaced households. Our experience, tools, and commitment to capacity building will help DCR minimize risk, maintain audit readiness, and deliver timely, equitable relocation assistance throughout the life of each project.

3.7.14 Task 14 – Communication, Public Information, and Outreach Support

To educate and empower residents and stakeholders, our team will produce clear, accessible, and program-specific public information materials. These will be crafted using Adobe InDesign and Canva for visual design, Microsoft Word for drafting, and Neighborly Software and Snowflake for integrating real-time program data into the website. In Month 1, we will conduct stakeholder interviews and gather program-specific content. By Month 2, our team will have drafted all core materials and begun wireframing the website. Month 3 will mark the launch of the public-facing site and the distribution of printed materials through community centers, events, and digital channels. Updates will continue throughout the program lifecycle, with content tailored to each recovery program and translated into multiple languages to ensure accessibility. Ongoing support will include quarterly content reviews, integration of new program data, and community feedback loops to keep materials relevant and responsive.

Standardized Templates for Press Releases, Stakeholder Notices, and Public Updates

To maintain consistency and speed in external communications, we will develop a suite of standardized templates using Microsoft Word, Google Docs, and Adobe Acrobat. These templates will be formatted for rapid deployment and stored in a shared repository accessible to County staff and subrecipients. In Month 2, we will draft the initial suite of templates. Month 3 will be dedicated to stakeholder review and approval, followed by staff training in Month 4. These templates will be refreshed quarterly to reflect evolving program needs and regulatory updates. Ongoing support will include template version control, user feedback collection, and technical assistance to ensure templates remain functional and aligned with County messaging standards.

Outreach Materials Tailored for Impacted Communities, Including Language Translation and Accessibility Accommodations

We will develop outreach materials that reflect the cultural and linguistic diversity of the community. Translation services will be provided through LanguageLine Solutions and local partners, covering Spanish, Ilocano, Tagalog, and other locally spoken languages. Accessibility will be verified using GrackleDocs and CommonLook to meet Section 508 standards. In Month 1, we will validate language access goals and identify translation needs. Month 2 will focus on developing English-language outreach materials, which will be translated and formatted for accessibility in Month 3. Distribution will begin in Month 4 through trusted community channels, with bilingual outreach staff supporting real-time engagement at events and via helplines. Ongoing support will include continuous translation services, accessibility audits, and community engagement to refine messaging and delivery formats.

Guidance Documents to Support Consistent External Messaging and Branding

To maintain coherence in tone, terminology, and visual identity across all platforms, we will author comprehensive guidance documents. These will be developed using Microsoft Word and Adobe Acrobat, and will include visual identity kits created in Canva. In Month 2, we will host branding and messaging workshops with County stakeholders. Month 3 will be dedicated to drafting the guidance documents and visual toolkits, with finalization and distribution scheduled for Month 4. These resources will be updated semi-annually to reflect program evolution and community feedback. Ongoing support will include branding consultations, updates to visual identity assets, and training sessions for new staff and subrecipients to ensure consistent application of messaging standards.

Communication Protocols for Crisis Communication, Public Inquiries, and Media Responses

We will establish robust communication protocols to support rapid, coordinated responses during crises and periods of high inquiry volume. These protocols will be built using Zendesk for inquiry tracking, Twilio for SMS and voice alerts, and Microsoft Teams for internal coordination. Call center staff will be trained using custom modules developed in Articulate 360, with a focus on cultural competency and trauma-informed communication. Month 2 will be dedicated to drafting protocols and escalation paths. In Month 3, we will conduct simulation exercises to test readiness and refine procedures. Month 4 will mark the full implementation of these protocols, which will be monitored and adjusted based on real-world scenarios. Ongoing support will include protocol refreshes, staff retraining, and performance monitoring to ensure responsiveness and accuracy during high-stakes communication periods.

Support for Public Meetings, Stakeholder Engagement, and Community Outreach Events

Our team will provide full-spectrum support for public meetings and outreach events, including planning, facilitation, material preparation, and post-event reporting. We will use Eventbrite for scheduling, SurveyMonkey for feedback collection, and PowerPoint and Canva for presentation materials. In Month 1, we will identify key stakeholders and schedule initial meetings. Months 2 and 3 will focus on preparing materials and facilitating outreach events. Month 4 will launch a recurring engagement series, with weekly updates provided to County stakeholders that include attendance metrics, engagement levels, and feedback themes. Ongoing support will include logistical coordination, facilitation services, and continuous improvement based on stakeholder input and community needs.

Spotlight Experience: For the State of Vermont, Guidehouse's Boots on the Ground (BOTG) outreach team engaged low-income Vermonters applying to the Emergency Rental Assistance Program (ERAP) through virtual and in-person efforts. Targeting rural and disconnected communities, the team contacted around 7,000 applicants, held over 50 outreach events, and distributed $22.5M in aid to disadvantaged households.

Together, these deliverables form a cohesive and adaptive communications strategy that supports transparency, builds trust, and drives meaningful engagement throughout the recovery process. Each component is structured around clear milestones and supported by industry-standard tools, ensuring that our team delivers with precision and responsiveness. With ongoing support embedded into every phase, we are committed to sustaining momentum, refining approaches, and remaining deeply attuned to the needs of the County and its communities. This is not just a communications plan—it is a framework for connection, accountability, and long-term resilience.

3.7.15 Task 15 – Grant Management

Guidehouse recognizes that the State's CDBG-DR recovery program relies on a network of subrecipients—local governments, nonprofits, and developers—who are responsible for delivering critical housing, infrastructure, and economic revitalization projects. The Action Plan highlights the scale, complexity, and regulatory demands of these programs, making robust subrecipient management essential.

Our approach is grounded in the understanding that **facilitating subrecipient contracting, compliance, and closeout activities, and providing practical tools for compliance and reporting,**

are foundational to program success (Figure 6). Guidehouse leverages the expertise of our Community Building and Investment Center of Excellence to deliver standardized, HUD-compliant contracting frameworks, risk-based compliance monitoring, and structured closeout processes. We apply a common sense approach to subrecipient monitoring—focusing on clear communication, practical risk assessment, and actionable feedback—while providing user-friendly tools such as reporting templates, compliance checklists, and technical assistance resources. This combination streamlines documentation, supports regulatory adherence, and enables real-time oversight.

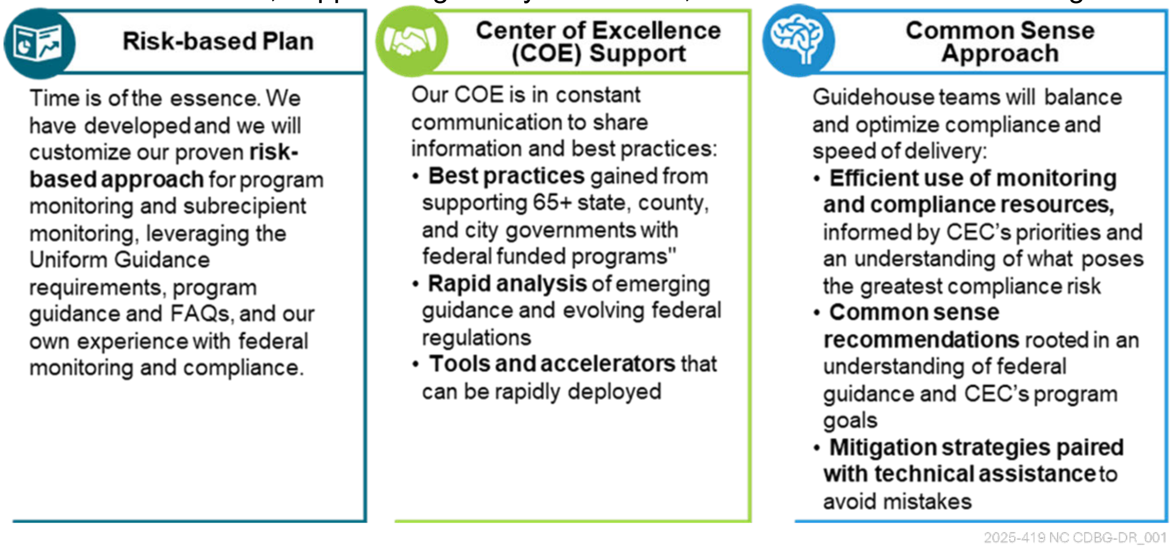


Figure 4. Our Approach to Grant Management

Facilitating Subrecipient Contracting, Compliance, and Closeout Activities

To facilitate subrecipient contracting, Guidehouse will deploy a modular contract development framework supported by our Compliance Requirement Crosswalk Tool—a dynamic database that will map federal, state, and local requirements (such as 2 CFR 200, Davis-Bacon, Build America/Buy America, NEPA, and program-specific statutes) to each subaward. This tool will enable rapid generation and updating of subaward templates, embedding current regulatory language and flow-down clauses. All contract versions, amendments, and compliance attestations will be managed through a digital contract management system with full version control and audit logging. **We anticipate completing the initial contract framework and tool deployment within the first 60 days of project initiation.**

During onboarding, each subrecipient will undergo a technical risk assessment using a quantitative scoring matrix that will evaluate factors like prior audit findings, financial controls, organizational capacity, and programmatic complexity. The resulting risk tier will determine the intensity and frequency of compliance monitoring activities. **This onboarding and risk assessment process is expected to be completed within 30 days of subrecipient identification.**

Guidehouse's monitoring process will begin with a systematic identification of all programs and subrecipients subject to oversight. Our team will partner with DCR and program leads to review subawards, spending decisions, and third-party agreements, using proven tools and templates to document subrecipient determinations. We will help DCR establish processes for both current and future funding decisions, so all subrecipients are promptly included in monitoring plans. Once identified, we will work with DCR to define clear monitoring objectives, drawing from federal guidance, grant terms and conditions, and relevant state and local regulations. Our methodology (**Figure 7**) will incorporate best practices from the COSO framework and the federal Green Book, tailoring objectives through a risk-based lens to prioritize areas with the greatest compliance and performance risk. **The initial monitoring plan and objectives will be established within 90 days of project start.**

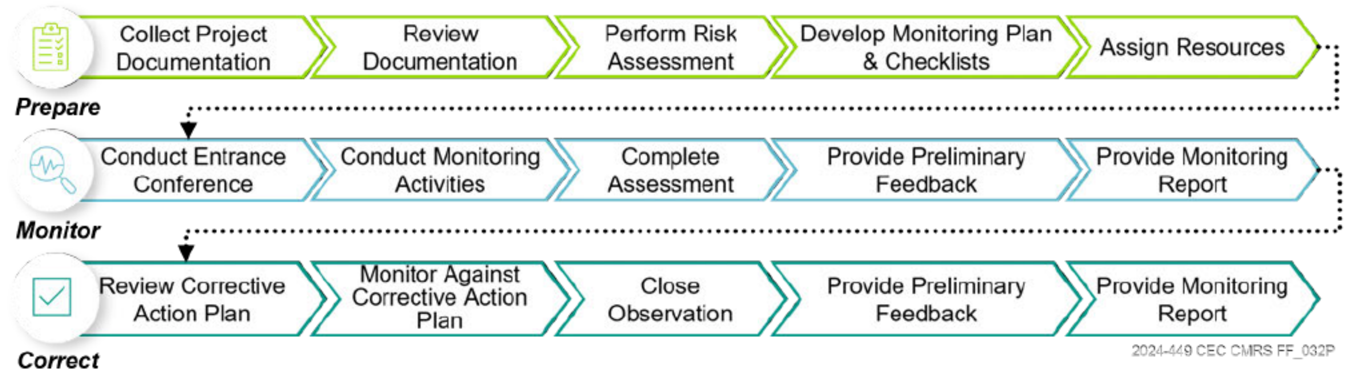


Figure 5. Guidehouse's Monitoring Framework

Our monitoring approach will be practical and scalable (**Table 5**). Each monitoring plan will be tailored to the specific risk profile of the subrecipient or project, with activities such as financial and performance report reviews, desk and onsite reviews, single audit reviews, and corrective action planning scheduled according to risk scores. We will leverage established sampling methodologies and statistical best practices, adapting them to DCR's needs for efficient expenditure and compliance testing. We will also develop and deliver communications materials—monitoring letters, reports, and meeting logs—to keep subrecipients informed and engaged, while maintaining a robust audit trail. **Ongoing monitoring activities will be initiated within 120 days and will continue throughout the grant lifecycle, with high-risk subrecipients prioritized in the first monitoring cycle.**

Table 4. Sample Size Guidance

Desired Level of Assurance (zero exceptions expected)	For Populations >250 - Minimum Sample Size	For Populations <250 - Minimum Sample Size
High	60	10%
Moderate	40	10%
Low	25	10%

Monitoring activities will address a wide range of compliance areas, including Davis-Bacon and prevailing wage, Build America/Buy America, NEPA, equipment and property management, and small/minority/women-owned business requirements. Guidehouse will prepare a comprehensive Monitoring Plan and timeline, sequencing reviews to prioritize high-risk programs and staggering activities for consistent, reliable oversight. Throughout implementation, we will emphasize frequent communication, actionable feedback, and partnership with DCR and subrecipients.

For closeout, Guidehouse will implement a structured, checklist-driven process aligned with 2 CFR 200.344 and 200.345. Subrecipients will receive digital closeout checklists that specify required financial, programmatic, and compliance documentation (See **Table**). A secure document portal will facilitate the submission and indexing of all closeout records, with automated reminders for outstanding items. All documentation will be archived with metadata tagging to support rapid retrieval during audits and to meet federal retention requirements. The closeout process will also include a final compliance review, reconciliation of financials, and preparation of audit-ready records. **Closeout activities will be initiated at least 90 days prior to the end of each subaward's period of performance.**

Table 5. Example List of Documents for Records Retention

Example List of Documents for Records Retention		
• Agreements and Budget Records • Allowable Costs/Cost principles Policy • Bid-and-Design Package Submittal and Approval	• Governance Resolutions to Accept Funding (as applicable) • Letters of Intent to Fund • Permits • Offer and Acceptance of grant funds	• Record of Local Government Payments Received • Records Retention Policy • Recipients or Other Proof of Payments • Reimbursement Request Forms

• Civil Rights/Nondiscrimination Policy • Compliance Policies and Procedures • Conflict of Interest • Contracts • Davis-Bacon certification and Reporting (as applicable) • Extensions Requests and Approvals	• Procurement Policy (as applicable) • Procurement and Purchasing Records • Project Closeout Records • Program Income Policy • Property Management and Real Property Policy • Purchase Orders and Invoices • Records of Fund Obligations	• Reimbursement Requests and Records • RFPs and RFQs, including all received • Selection Methodology and Outcomes • Subaward Policy and Monitoring Records • Subrecipient Agreements • Written Internal Controls

Providing Tools to Facilitate Subrecipient Compliance and Reporting

Guidehouse will deliver a suite of technical tools designed to streamline compliance and reporting for subrecipients. The Compliance Requirement Crosswalk Tool will serve as a living reference, mapping each grant's requirements to actionable tasks and linking directly to source regulations and guidance. Reporting templates—customizable in Excel, SharePoint, or other platforms—will guide subrecipients through required data fields, incorporating built-in data validation, error checking, and automated aggregation for DCR roll-up reporting. Because Guidehouse's Community Building and Investment Center of Excellence constantly maintains and updates these tools, only minimal time will be needed to tailor them to DCR's unique requirements; we anticipate initial deployment of these tools within the first 30–45 days of project initiation.

For programs requiring direct data submission to federal systems, Guidehouse will provide API-ready templates and technical integration support, enabling seamless data transfer and reducing manual entry errors. Dashboards will present key performance indicators, compliance status, and reporting deadlines in real time, supporting both subrecipient and DCR oversight.

Spotlight Experience: Guidehouse created policy manuals for five programs being implemented under Missouri Department of Economic Development CDBG-DR grant. The policy manuals included cross-cutting regulations that apply to all programs, while also providing policy specific to each program, including Infrastructure and Housing Programs. In addition to the policy manuals, our team conducted training sessions with DED staff, subrecipients and contractors for each specific program. To supplement the trainings, our team also provided program-specific templates and checklists to ensure all stakeholders had the tools they needed to successfully implement their programs.

Training and technical assistance will be delivered through a multi-modal curriculum, including live webinars, on-demand tutorials, and interactive workshops. Each training module will be mapped to specific compliance topics—such as procurement standards, labor compliance, and reporting protocols—and will include pre- and post-training assessments to measure knowledge transfer and identify areas for further support. Training and support resources will be available to subrecipients as soon as the tools are launched, with ongoing sessions scheduled throughout the grant lifecycle.

By integrating these technical solutions, Guidehouse will establish a robust infrastructure for DCR subrecipient contracting, compliance monitoring, closeout, and reporting. This approach will not only address regulatory requirements but will also drive operational efficiency, data integrity, and audit readiness across the entire grant management lifecycle.

3.7.16 Task 16 – Technical Systems Specification & Project Management

As a leading grants management technology solutions provider, Team Guidehouse has the expertise and experience to partner with DCR to assess, manage, and optimize DCR's System of Record (SOR). Our support will begin with documenting the standard operating procedures for workflows and recommending best practices to anticipate and assist with navigating the SOR. Within the first quarter, we will provide excel based checklists that can be integrated into DCR's SOR for streamlined review and approval of project eligibility, procurements, drawdowns, and other approval-based processes.

Financial Management

Team Guidehouse has extensive experience tracking billions of dollars in disaster recovery funding from multiple federal funding sources. Keeping close track of all funding is crucially important, as having funds flow in the correct amounts and to the correct subrecipients provides both effective recovery and programmatic compliance. Team Guidehouse will maintain dashboards to track program financials for each recovery program managed by DCR using the current SOR. Our team will also monitor program budgets and fund balances so that sufficient funds are allocated and available to meet the needs of day-to-day operations.

Spotlight Experience: Guidehouse supported Harris County, TX with overall grant administration and financial oversight across multiple federal funding streams, including FEMA PA, CDBG-DR, and FHWA funds. Our team assisted in the enhancement of Harris County's procurement procedures and practices and provided monitoring and compliance support to facilitate effective financial management of the County's recovery program. In total, our team provided financial management support, including financial tracking and reporting, for over $1 billion in funding.

Reporting

Based on our experience undertaking integrity monitoring, internal audits, monitoring and compliance reviews for our state and local government clients' federal disaster recovery programs, we have crafted a compliance and monitoring reporting style that is easily adaptable, customizable, and deployable. Our team has great experience working in or deploying databases for our clients on a host of software database management systems and will work with DCR to determine the best reporting system solution. Accurate and timely reporting maximizes DCR's ability to track, share, and meet program objectives and timelines, protects DCR by increasing compliance with federal requirements, and serves as a safeguard to maximize the use of CDBG-DR funds. We will work with you to determine the best method to collect, review, and submit reporting data.

As projects are stood up, our team will actively support the team and leadership in the ongoing oversight and management of the projects against state and national objectives of the program and effectively affirm that milestones are properly reported and recorded DCR's reporting system.

We will coordinate with the identified points of contact within the team leadership and staff and conduct weekly check-in meetings and provide required project performance. We will provide dashboard reports during these check-in meetings, or at an as needed basis, as the reports will be designed to run automatically. We will prepare executive-level reports and dashboards to monitor program progress and we will help maintain data, records, and critical documentation to clearly identify the costs incurred by the State and its subrecipients.

Our team will continue to refine and improve our processes/system, roles, and structure to track and ensure qualifying costs and financial records are appropriately documented and recorded in accordance with necessary federal and state guidelines. We will also work to help establish a set of record reports and system inputs that align with expectations for accessible program information that effectively enables the State to obtain, analyze, and gather field documentation. Our team will work to design DCR's reporting system in a manner that will allow for documentation to be pulled and provided expeditiously upon request.

As projects come to their conclusion, our team will work hand in hand to confirm that all necessary monitoring and compliance workpapers inform closeout activities that have been completed to appropriately document program outcomes and compliance with relevant reporting requirements.

Data Security

Team Guidehouse takes data security seriously and is fully prepared to comply with information security policies, standards, and procedures. Upon contract award, our PMO will direct resources to review security policies during project onboarding. Additionally, we will implement controls to maintain compliance as needed and address any security incidents.

Spotlight: For Office of Resilient Homes and Communities (RHC), formerly New York Governor's Office of Storm Recovery (GOSR), Guidehouse provided project management to the Organizational Systems and Performance division which is responsible for delivering agency-wide technical needs from infrastructure and software to maintenance and technical support. As the agency matured and needs became increasingly complex and intertwined, there was a need to create stronger and more disciplined Portfolio Management, Project Management and Business Analysis capabilities, and support the agency in critical technical decisions. By the end of the task order, Guidehouse:

- Conducted a thorough comprehensive quality assurance and testing so applications were delivered bug-free
- Maintained consistent customer service and communication which was very well received by other departments
- Assisted IT Leadership and Agency-executives make clear and strategic technical decisions that were aligned with core priorities.
- Created a key performance indicator system to enable automation in collecting data points and improve consistency in executive reporting
- Conducted an information security assessment of a third-party application used by RHC
- Spearheaded a month-long complex data migration exercise which included providing expertise with technical solutions, project planning, and testing to provide business continuity.
- Developed a ticketing system that helped RHC prioritize and streamline the high volume of development requests
- Built a dashboard to track programmatic costs across projects and municipalities as aligned with RHC's Low and Moderate Income (LMI) objectives.

3.7.17 Task 17 – Environmental Review

Team Guidehouse approaches environmental review as a collaborative, transparent, and highly structured process that supports DCR, subrecipients, and local communities in meeting all HUD and NEPA requirements under 24 CFR 58. Our team has successfully delivered environmental reviews for CDBG-DR programs in diverse settings—including infrastructure, economic revitalization, multi-family, workforce housing, and hazard mitigation projects—by combining technical expertise, stakeholder engagement, and advanced digital tools.

Our process begins with a tiered review strategy, which allows us to address broad environmental issues at the program level before focusing on site-specific details. This approach not only streamlines compliance but also accelerates the release of federal funds and project implementation.

Tier 1: Broad-Level Review and Policy Setting

Within the first 30 business days of project initiation, our environmental specialists work with DCR and local partners to identify and evaluate general environmental issues that can be addressed even before specific sites are selected. Using GIS mapping, regulatory research, and lessons learned from projects in Collier County, FL and Joplin, MO, we establish the standards, constraints, and processes that will guide all subsequent site-specific reviews. We develop detailed checklists and procedures, document findings and supporting data in SharePoint and HEROS, and publish required public notices to engage stakeholders early in the process.

Tier 2: Site-Specific Environmental Reviews

As individual sites are identified, our team moves quickly—typically within 20 business days—to conduct site-specific reviews. We collaborate with DCR and subrecipients to define the scope and schedule, address any County comments, and upload the final Environmental Review Record (ERR) to HEROS for HUD review. Our specialists determine the appropriate level of review for each project—whether Exempt, Categorically Excluded (subject or not subject to §58.5), Environmental Assessment, or Environmental Impact Statement—based on project characteristics and regulatory requirements. We conduct detailed analyses, including field assessments and agency consultations (e.g., SHPO, USFWS), and document compliance with all applicable federal, state, and local laws.

Throughout both tiers, we emphasize documentation, transparency, and public engagement. All findings, maps, and supporting data are maintained in SharePoint and Neighborly Software, ensuring audit readiness and easy access for DCR and HUD reviewers. We use Metric's GIS web applications to standardize data collection and reporting, and we prepare and publish all required notices—such as Findings of No Significant Impact (FONSI) and Notices of Intent to Request Release of Funds (NOI/RROF)—to keep the public informed and involved.

Reevaluation and Ongoing Compliance

When project scopes or site conditions change, our team is prepared to reevaluate environmental reviews within 10 business days of notification. We update documentation, coordinate with DCR and HUD, and maintain compliance to avoid project delays.

- **Milestones and Timing at a Glance**
  - **Tier 1 Review Completion:** 30 business days from project initiation
  - **Tier 2 Site-Specific Review:** 20 business days from site selection/data receipt
  - **Reevaluation of Environmental Review:** 10 business days from change notification
  - **Public Notices and Engagement:** Ongoing, as required by project milestones
  - **Documentation and Recordkeeping:** Ongoing, with all records maintained in SharePoint, Neighborly Software, and HEROS
- **Tools and Methods**
  - **GIS Mapping & Analysis:** For site screening and environmental constraints
  - **HEROS:** For preparing, submitting, and tracking all environmental review records
  - **Metric GIS Web Applications:** For streamlined ERR data collection and reporting
  - **SharePoint & Neighborly Software:** For centralized document management and workflow tracking
  - **Standardized Checklists & Templates:** For consistency and completeness
  - **Power BI Dashboards:** For real-time visibility into review status and compliance metrics

Representative Experience

In Collier County, FL, member of Team Guidehouse, Metric, conducted site-specific environmental reviews for CDBG, HOME, and CDBG-DR projects, preparing NEPA documentation, coordinating agency consultations, and maintaining audit-ready records in HEROS. For the City of Joplin, MO, we managed Tier 1 and Tier 2 reviews for housing and infrastructure projects, developed compliance checklists, and facilitated public engagement, resulting in HUD-recognized exemplary practices. In Harris County, TX, we integrated environmental review workflows into the county's grants management platform, enabling rapid review, documentation, and compliance monitoring for hundreds of projects.

By following this structured, milestone-driven approach and leveraging advanced tools, Team Guidehouse delivers environmental reviews that are timely, compliant, and fully aligned with DCR's objectives. Our process supports the responsible entity and local communities in identifying the appropriate review level, preparing all required documentation, and maintaining transparency and audit readiness throughout the life of each project.

3.8 Resumes

3.8.1 Matt Davis, CDBG-DR Engagement Partner

Matt is a Partner within our State and Local Government Practice with extensive experience leading large-scale and federally funded programs. He brings expertise in program design, implementation, and compliance and closeout to provide the intended outcomes are delivered to communities' and their constituents. Matt brings subject matter expertise in stakeholder engagement, program management, and technology enablement to his teams and clients, including cities, counties, and states. Prior to his consulting career, Matt served more than seven years as an active-duty Marine Corps Infantry Officer where he led infantry platoons, Tactical Operations Centers (TOCs) and coordinated emergency operations while deployed.

Degree/Education/Certifications

- Executive M.P.A., Syracuse University
- M.S., Analytics, Ohio State University
- M.B.A., Marquette University
- B.S., Shenandoah University

Years of Experience

15 Years

Areas of Expertise

- Grants design
- Grants compliance and monitoring
- Stakeholder and community engagement
- Grants technology design, implementation and management
- Marketing and outreach
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Project management

Relevant Experience

- **For the State of Florida,** Matt oversees the state's BEAD program design. Florida received a total allocation of $1.16B in BEAD funds to increase broadband access throughout the State. The team conducted statewide stakeholder engagement to inform the program's guiding principles for how the State will use their funding allocation. Guidehouse developed the initial and final proposal and engaged with the Internet Service Providers (ISPs), Community Action Agencies, veteran groups, aging populations, rural stakeholders, among others.
- **For the State of Georgia,** Matt oversees the State's implementation of their $220M Home Energy Rebate program. Prior to the implementation phase, Matt was the engagement partner who oversaw the program design, application, and the state's implementation blueprints (e.g., state plans). Matt oversaw program design, technology development and rebate processing development. Matt was instrumental in identifying and developing the contract outreach and training strategy to increase the residential contractor subscription to the program. Matt oversees QA of the projects, including the quality assurance of each project.
- **For the State of South Carolina,** Matt served as the engagement partner overseeing the program design, including stakeholder engagement with Community Action Agencies, and other related programs (e.g., WAP, LIHEAP, CSBG). Matt and the team conducted widespread stakeholder engagement to inform the program's design principles, which included engagement with the contractor workforce and technical colleges. Matt's team designed the state's energy efficiency program and recently submitted the state's application and implementation blueprints for Department of Energy approval. Matt also oversaw the State's BEAD program design and their APRA fund management.
- **For the State of Michigan,** Matt developed and led the grant review and quality assurance process for the State's $409 million business grant program that appropriated state ARPA funds to be awarded to businesses that met certain criteria. Matt led the team as they reviewed and processed

over 8,200 applications and made payments to awarded applicants. Matt advised the managed services and call center team to promote timely and quality customer service throughout the program. Matt advised the technology team as they designed and implemented a Salesforce-based grants management platform to manage the end-to-end grants program.

- **For the State of North Dakota,** Matt served as the engagement and quality director supporting the state's BEAD Program and Capital Project Funded broadband grant program. North Dakota received a total allocation of $130.2M in BEAD funds to increase broadband access throughout the State. Matt oversaw the program design for the statewide broadband program that included application design, grantee communications and marketing campaign, technical assistance support, and identifying the technology plan to support the program. Matt led the statewide stakeholder engagement strategy and facilitated statewide stakeholder engagement that included outreach and engagement with disadvantaged communities, rural communities, veterans, incarcerated individuals, five federally recognized tribes, and internet service providers (ISPs). Matt's team completed a market needs analysis across the state to assist with the design of the State's BEAD program.
- **For the State of Michigan,** Matt served as the quality assurance director for Michigan's Office of Accountability, compliance, and monitoring engagement where Guidehouse oversees the compliance and monitoring of $22 billion in federally funded programs from CARES, CRRSA, and ARPA. Matt developed the Statewide reporting framework and underlying processes to meet federal requirements for ARPA and CRF reporting to U.S. Treasury. Matt led the development of the grants management framework, mobilization activities, and oversight so that programs met their intended objectives. Matt led the financial reporting workstream that included the design, tooling, and training for grantors and grantees to report obligations and expenditures to U.S. Treasury.
- **For the United States Marine Corps,** Matt served as an infantry officer and operations officer in support of Battalion Landing Team 2/1. As the Battalion's Assistant Operations Officer, Matt led the Operations Department (S-3) that included managing the Tactical Operations Center (TOC) for various missions while outside the continental US (OCONUS). Matt oversaw the training, development of standard operating procedures, and operations of the TOC. The TOC included internal BLT 2/1 teams (S-1 through S-6) and external units, special operations, contractors, and foreign militaries to coordinate land-based, and air operations. Matt also served as the Tactical Recovery of Aircraft Personnel (TRAP) platoon commander, leading teams in recovery operations. Matt is SERE certified.

3.8.2 Kajal Patel, CDBG-DR Engagement Partner

Kajal is the leader of Guidehouse's Capital Projects & Infrastructure practice, which encompasses core infrastructure program management, disaster recovery and resilience, and housing and community solutions services. Kajal has a deep industry knowledge of federal disaster recovery grant programs, including programs funded through the American Rescue Plan and CARES Acts, CDBG-CV, CDBG-DR, FEMA PA, FHWA-ER, and FEMA HMGP. Kajal supports federal, state and local governments, utilities, and commercial healthcare clients in the full life cycle of administering these grant programs, from program design to closeout. Kajal worked with state and local government agencies in South Carolina, Texas, New York, Louisiana, Colorado, Illinois, and Missouri with the development and execution of their grant administration programs, long-term recovery strategy development and implementation, monitoring and compliance, and readiness for project and program closeouts.

Degree/Education/Certifications	**Years of Experience**
• M.P.A., Columbia University • B.S., Rutgers the State University of New Jersey	14 Years

Areas of Expertise

- Long term recovery planning

- Capital project program design
- Program administration
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Proficient in the use of the HUD Disaster Recovery Grant Reporting System (DRGR)
- Project management oversight
- Integrity monitoring and compliance
- Grant compliance and monitoring
- Hazard mitigation

Relevant Experience

- **For the City of Chicago, IL,** Kajal supported the drafting of Chicago's Action Plan, hosted public meetings, and prepared required program policies and procedures for long-term recovery efforts involving flood mitigation and water and sewer infrastructure projects following severe storms and flooding.
- **For the State of South Carolina,** Kajal led the design, development, and administration of the Community Development Block Grants (CDBG)-Cares Act (CV) program for public facilities and public services projects. Kajal led the design and implementation of application, drawdown, and payment processes and provided technical assistance to applicants on submissions via training and direct assistance.
- **For the State of Missouri, Department of Economic Development,** Kajal developed policies and procedures for several state CDBG-Disaster Recover (DR) and CDBG-Mitigation Funds (MIT) programs, including affordable multifamily rental recovery, general infrastructure and mitigation, infrastructure in support of housing, and homeowner rehabilitation and reconstruction.
- **For New York State Governor's Office of Storm Recovery (GOSR),** Kajal provided quality control and assurance for the construction program in the Housing Department through procurement, change orders, invoices, DBA compliance, and small business and Minority/Women-owned Business Enterprise (M/WBE) contractor utilization review. Kajal helped complied with program policies and procedures and federal grant program requirements to promote audit readiness.
- **For Harris County, TX,** Kajal managed several workstreams related to disaster recovery strategy development, program management, and project execution following Hurricane Harvey. Kajal Oversaw construction project management and delivery, financial reconciliations, and grant monitoring and compliance for various CDBG-DR programs including a Homeowner Assistance Program and Single Family New Construction program.
- **For the City of Joplin,** Missouri, Kajal provided project management services through the development of HUD partial action plan approvals, environmental assessments, procurement of engineering firms and contractors, oversight of construction activity, and grant closeout activities while establishing processes and controls to monitor grant compliance and effectively manage cost and schedule risks. Kajal oversaw construction project management and delivery, financial reconciliations, and grant monitoring and compliance for various CDBG-DR programs including a Homeowner Assistance Program and Single Family New Construction program.

3.8.3 Gaurav Menon, CDBG-DR Subject Matter Expert

Gaurav is a Partner in Guidehouse's Infrastructure and Resilience practice, where he leads the team in state and local markets. With more than 20 years of professional services experience, Gaurav specializes in supporting public and private sector entities involved in the delivery of large and complex grant programs with a focus on long-term community development and capital asset rebuilding strategies. His focus is on dealing with federal grants such as CDBG-DR, where he advises clients on project management oversight, governance assessments, investigations, risk assessments, contract reviews, policies and procedures enhancements, and management controls.

Degree/Education/Certifications	**Years of Experience**
• B.S., Drexel University	22 Years

Areas of Expertise

- Grant compliance and monitoring
- Project management
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Technical assistance and training
- Policy development
- Emergency management

Relevant Experience

- **For the City of Joplin,** Gaurav served as Engagement Leader, directing HUD CDBG compliance monitoring, oversight, and eligibility reviews for infrastructure, housing, and community development projects related to the city's recovery from a devastating EF-5 strength tornado. Gaurav supported the development of a long-term recovery strategy and capital plan. Gaurav reviewed environmental assessments to evaluate potential environmental hazards and risks, suggested mitigation measures for unavoidable impacts, and monitored compliance with various State and Federal agency requirements and completeness in supporting documentation.
- **For Harris County,** Gaurav served as Program Leader assisting with strategy around disaster recovery and grants management related to Hurricane Harvey. Gaurav oversaw $1.1B+ in federal funding to several departments including Community Services, Engineering, Parks, the Purchasing Office, the Auditors Office, the Sheriff's Department, and the Fire Marshall's Office.
- **For the State of Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP)**, Gaurav served as Senior Project Manager where he assisted in administering $14B for housing and infrastructure damaged by Hurricane Katrina. Gaurav led the Applicant Assistance team to provide technical advice and assistance to FEMA PA applicants for reconstruction projects, including maintenance of auditable documentation and support. Gaurav supported required enhancements to improve the effectiveness and efficiency of public assistance grant management, improve internal controls and financial reporting, improve technology, and monitor and effectively close out applicants.
- **For the New York State Governor's Office of Storm Recovery (GOSR),** Gaurav served as Engagement Director for the to assess their vendor management and oversight processes. Gaurav performed audits of vendors and assisted GOSR in preparation for a HUD program audit. Gaurav evaluated subrecipient monitoring policies and provided general policy and procedural recommendations.

3.8.4 Dami Kehinde, CDBG-DR Subject Matter Expert

Dami is a Director with Guidehouse's Disaster Recovery and Resilience practice, where she brings her 19 years of experience in public infrastructure, transportation, and grants administration. She has extensive knowledge of the CDBG-DR program through her role as program manager of the City of Joplin's recovery efforts, as a SME with the State of Missouri and working with other states and local governments on the CDBG-DR, CV, and MIT programs. Dami is well versed in using the CDBG-DR program for infrastructure and public facilities, hazard mitigation, single family and multifamily reconstruction, public service, and economic revitalization programs. Dami has experience in Action Plan Development and amendment, policy and procedures development, stakeholder analysis and outreach, operations management, Environmental Reviews, HEROS, Section 3 compliance, prevailing wage oversight, construction management, subrecipient management, risk assessments, program implementation, DRGR, compliance and monitoring, internal audits, training, and *closeout. Dami has supported response and recovery programs in Missouri, Texas, Arizona, New York, and the City of Detroit.*

Degree/Education/Certifications	Years of Experience
• Master of City and Regional Planning, Morgan State University • Bachelor of Architecture, Howard University	19 Years

Areas of Expertise

- Grant compliance and monitoring
- Project management
- Technical assistance and training
- Policy development
- Ability to effectively identify and prevent duplication of benefit
- Emergency management
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations

Relevant Experience

- **For New York Governor's Office of Storm Recovery**, Dami was the Project Manager overseeing CDBG-DR grants management and closeout processes, SOPs, financial management, trainings and establishing pilots to assist with vendor, subrecipient, contractor, developer, and project closeout, etc., evaluate subrecipient monitoring policies, and provide general policy and procedural recommendations.
- **For the City of Joplin, Missouri**, Dami worked with the City of Joplin and Missouri State government as a Project Manager in the administration of their $158M CDBG-DR grant received as a result of an EF-5 strength tornado which devastated the city in 2011. She assisted in providing oversight on a variety of Public Infrastructure and Facilities projects (Capital Improvements, Streets, Sanitary Sewer and Storm projects), Housing, Economic Development and Public Service projects. Dami worked with the team on developing their compliance manual and their Integrated Master Schedule (IMS), which included all phases related to the project lifecycle.
- **For a State client**, Dami worked with the Grant Administration efforts related to their CDBG-CV allocation. Some of the activities include Action Plan amendments, overseeing the public comment phase, program design and implementation as well as updating their existing policies and procedures to address duplication of benefits, internal audit controls, and overall monitoring and compliance.
- **For a State Emergency Rental Assistance Program**, Dami serves as an Operations Director with a team of 2,000+ operational resources. The Operations team is responsible for reviewing applications, appeals, and denials. Also worked on establishing the SOPs related to the policies and procedures related to accurately and efficiently disbursing all the allocated federal dollars to residents to help prevent or avoid homelessness. Established communication protocols with the housing specialists, residents, landlords, and call centers to maintain consistency in messaging policy and streamlined procedures. As of October 2022, $3B in ERAP assistance has been paid which has helped provide housing support/stability to over 200,000 families.
- **For the City of Joplin, Missouri**, Dami is working with the city to identify ARPA/BIL funding opportunities that will help to increase federal grant opportunities that support the city's housing, recreational, infrastructure, and economic needs. The team is working to map their unfunded projects to ARPA/BIL funding sources, while prioritizing and assessing eligibility requirements related to all these grants. As a part of this work, the team is coordinating with various city departments and external stakeholders and providing programmatic statuses updates to City Council members.

3.8.5 Suzanne Settoon, CDBG-DR Subject Matter Expert

Suzanne has 19 years of experience in emergency management and disaster recovery, specializing in HUD programs, particularly CDBG-DR, as well as FEMA Public Assistance (PA) and the Hazard Mitigation Grant Program (HMGP). A former FEMA CORE employee, she managed disaster recovery for major events like Hurricane Katrina and the 2016 Great Floods. Since transitioning to the private sector, she has assisted municipalities, school boards, and public entities in maximizing FEMA PA eligibility, identifying HMGP opportunities, and verifying compliance with federal regulations. In addition to her HUD expertise, Suzanne has extensive experience with FEMA programs, providing program oversight and technical advice to facilitate reimbursement for FEMA claims, including responses to COVID-19 and Hurricane Ian. Her extensive knowledge of both HUD and FEMA regulations enables her clients to receive optimal funding and maintain compliance throughout the recovery process.

Degree/Education/Certifications	Years of Experience
• B.A., Louisiana State University	19 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Project management

Relevant Experience

- **For the City of St. George,** Suzanne serves as the Project Executive for the All Hazard Mitigation Plan.
- **For City of Nashua, NH,** Suzanne serves as Project Executive, overseeing administration of the HOME-ARP Program.
- **For the Louisiana Office of Community Development,** Suzanne serves as Project Executive, overseeing CDBG-DR Quality Assurance/Quality Control services for the Restore Louisiana Homeowner Assistance Program.
- **For Franklin County, OH,** Suzanne is a subject matter expert (SME) on federally funded programs supporting the implementation of the HOME Program.
- **For the City of Pinellas Park, FL,** Suzanne serves as a Project Executive providing grant management services.
- **For the KEYS Energy Services, Key West, FL,** Suzanne serves as a Project Executive providing emergency management consulting services.
- **For the Texas General Land Office (GLO),** Suzanne serves as a Project Executive who oversaw CDBG-DR Uniform Relocation Assistance.
- **For the City of Chipley, FL,** Suzanne served as Principal, conducting grant preparation services for the Reconnecting Communities and Neighborhoods program.

3.8.6 Raquel Malmberg, Federal Grants Management Subject Matter Expert

Raquel is a Partner in Guidehouse's U.S. State and Local Government Advisory Practice and leads the Community Building and Investment team. She has 20 years of experience working for and with government agencies to improve their operations and implement strategies and recommendations to fulfill their missions. Raquel works with clients around the country to design and implement federally funding projects. Raquel currently co-leads Guidehouse's work delivering the Inflation Reduction Act (IRA) Home Energy Rebate programs for several state clients. She works to support clients maximizing their federal dollars and developing strategies to meet the individual needs of their constituents. Raquel supports state and local governments with project development, financial management and tracking, monitoring and compliance and closeout. Prior to joining Guidehouse, Raquel worked for more than nine years for the City of New York.

Degree/Education/Certifications

- Master of Urban Planning, New York University
- B.A., The College of William and Mary

Years of Experience

20 Years

Areas of Expertise

- Grant compliance and monitoring
- Ability to effectively identify and prevent duplication of benefit
- Project management
- Knowledge of new housing construction and all related regulatory compliance, including building codes

Relevant Experience

- **For the New York State RHC Program Management and Monitoring,** Raquel led the effort to perform program management and integrity monitoring services for the State's Superstorm Sandy response for the past eight years. During this time, she managed a team of consultants to support the office in administering the CDBG-DR program in a variety of areas including design processes, reviewing application files for compliance and completeness, improving current processes, responding to external audits and reviews, and supporting technology improvements.
- **For the City of New York Office of Management and Budget (OMB),** Raquel oversaw the team that conducted internal audits of the agency's oversight and management of federal CDBG-DR funding for post-Superstorm Sandy.
- **For the State of New York Emergency Management Operations,** Raquel managed a project team responsible for analyzing and providing recommendations on emergency management operations, including the development of its emergency stockpile program, procurement processes, and contract program. She drafted policy and procedure documents with several State agencies and helped to prepare a long-term vision for processes and tools used to respond to emergencies and disasters.
- **For multiple State Emergency Rental Assistance Programs (ERAPs),** Raquel served as a lead partner providing subject matter expertise for several statewide rental assistance programs.

3.8.7 Dustin Hinkel, Federal Grants Management Subject Matter Expert

Dustin is a recognized expert in federal grant compliance and a leader in Guidehouse's Community Building and Investment Team, with 16 years of experience helping communities secure, manage, report, and close out state and federal grants. As a Certified Grants Management Specialist, awarded by the National Grants Management Association, Dustin has supported counties, cities, nonprofits, and state agencies in administering over $3 billion in federal awards from HUD, FEMA, Treasury, HHS, EPA, and the Department of Energy. His public service as County Administrator for Taylor County, Florida, gives him a unique perspective on the practical challenges local governments face, allowing him to design compliance and reporting solutions that are both effective and realistic for staff to implement. Prior to his tenure as County Administrator, Dustin served the County as its Emergency Management Director. He led the County through its recovery and response to Hurricane Hermine, Tropical Storms Debbie and Aundrea, and the Deepwater Horizon Oil Spill. Dustin has been recognized by the Florida Emergency Preparedness Association for his experience and expertise in the field of emergency management through its Florida Associate Emergency Manager (FAEM) professional credential.

Degree/Education/Certifications	Years of Experience
• M.A., Natural and Technological Hazards Geography, University of South Florida • B.S., Environmental Science and Policy, University of South Florida • Florida Associate Emergency Manager (FAEM), Florida Emergency Preparedness Association (FEPA), 2013 and 2018 • Certified Grants Management Specialist (CGMS), National Grants Management Association (NGMA) • ICS 100, 200, 700, 800, G300, G400, & 60 total FEMA courses • FEMA Professional Development Series Certification	15 Years

Areas of Expertise

- Grant compliance and monitoring
- Project management
- Emergency Management
- Ability to effectively identify and prevent duplication of benefit

Relevant Experience

- **For the North Carolina Clean Energy Fund**, Dustin led a team of consultants in evaluating the organization's policies, procedures, and internal controls for compliance with EPA and OMB 2 CFR 200 requirements. He provided expert guidance to help NCCEF strengthen its policies on conflicts of interest, procurement, financial management, and time and effort reporting—aligning them more closely with federal standards and improving overall grant readiness.
- **For the Florida Division of Emergency Management,** Dustin led a team of grants management consultants responsible for subrecipient monitoring and closeout of 135 subrecipients and 946 federally funded disaster recovery projects, reviewing 100% of subrecipient claimed costs for compliance with 2 CFR 200 and FEMA Public Assistance requirements—totaling over $250 million. This work included direct collaboration with Hillsborough County staff to review and validate 20 disaster recovery projects seeking over $27 million in reimbursements, as well as oversight of 15 subrecipients within Hillsborough County—including the Sheriff's Office, Tampa General Hospital, and the City of Tampa—seeking more than $23 million in disaster response and recovery reimbursements across 85 projects.
- **For New Castle County, Delaware,** Dustin leads a team of grants management professionals providing comprehensive, full-lifecycle management of over $450 million in awards received by the County from the U.S. Department of Treasury (Coronavirus Relief Fund and State and Local Fiscal Recovery Fund) and FEMA's Public Assistance Grant Program. Under his leadership, the

Guidehouse team developed and implemented robust internal controls for documenting compliance with 2 CFR 200 and federal agency requirements related to allowable costs, procurement, subrecipient and contractor monitoring, and project reporting. For the past five years, the team has led the County's efforts to develop and submit accurate quarterly and federal reports for more than 350 federally funded projects. The team is also responsible for monitoring the activities of over 120 subrecipients, conducting risk assessments, subaward development, desk audits, technical assistance, corrective action planning, and subaward closeout. Guidehouse's support has helped the County respond to Single Audit inquiries for the past three fiscal years with no findings related to the use of grant funds managed by Guidehouse.

- **For Richland County, South Carolina,** Dustin led a team of grants management professionals providing comprehensive services to support the County's development and implementation of projects funded by over $80 million from the U.S. Department of Treasury's State and Local Fiscal Recovery Fund. Under his leadership, the Guidehouse team established project eligibility determinations and launched a competitive grant program, including drafting notices of funding opportunity (NOFOs). The team evaluated more than 150 project proposals across two funding rounds, conducted risk assessments, and assisted with subaward drafting and execution. They monitored subrecipient activities and facilitated quarterly reporting using standardized forms. As a result of this program, the County awarded funding to over 60 projects that addressed critical community needs in public health, infrastructure, and economic recovery. Additionally, the team identified and corrected anomalies in federal reporting, leading to improved data quality and more accurate, timely submissions for future reporting cycles.
- **For the City of Chicago, Illinois,** Dustin served as a federal grants management subject matter expert for the City, advising on the management and reporting of its State and Local Fiscal Recovery Fund award totaling over $1 billion. He evaluated project proposals, identified eligibility risks, and recommended strategies to strengthen project compliance. Dustin also reviewed the City's quarterly reports for accuracy and alignment with federal agency guidance, helping the City improve compliance and reporting outcomes.
- **For Taylor County, Florida,** Dustin served in several roles supporting the residents of Taylor County, including as Emergency Management Director, Purchasing Director, and Assistant County Administrator. As County Administrator, Dustin was responsible to the County's elected Board of County Commissioners and residents for the day-to-day administration of the County's departments and administration of its state and federal grant portfolio, including awards from Florida Commerce's Small Cities CDBG and State Housing Initiative Programs, FDOT's Small County Road Assistance and Small County Outreach, and FDEP's Florida Recreation Development Assistance Program.

3.8.8 Greg Heller, Housing and Homeless Subject Matter Expert

Greg is the Partner leading Guidehouse's Housing and Community Solutions practice, bringing over 20 years of experience in real estate finance, affordable housing, community development, and smart government strategies across both public and private sectors. At Guidehouse, he leads engagements focused on public sector housing policy, affordable housing structuring through commercial real estate, and the management of Emergency Rental Assistance (ERA) and Homeowner Assistance Fund programs. Prior to joining Guidehouse, Greg served as Executive Director of the Philadelphia Redevelopment Authority and previously was CEO of a Baltimore-based consulting firm advising clients nationwide on community finance and social-impact real estate. He has received the Urban Affairs Coalition's Community Leadership Award (2021) and AIA Pennsylvania's Government Award (2017), and currently serves on the Urban Land Institute's national Public-Private Partnership Product Council.

Degree/Education/Certifications	Years of Experience
• B.A., American Studies and German Studies, Wesleyan University	20 Years

Areas of Expertise

- Grant compliance and monitoring
- Ability to effectively identify and prevent duplication of benefit
- Project management
- Knowledge of new housing construction and related regulatory compliance, including building codes

Relevant Experience

- **For the City of Baltimore, MD,** Greg leads the team developing Baltimore's first housing plan. Work includes significant stakeholder engagement, including four town hall meetings with hundreds of participants each, over a dozen roundtable groups, and dozens of interviews. Stakeholders include different audiences depending on the format—ranging from developers and builders to diverse community stakeholders. Also, for Baltimore, Greg managed operations to distribute $15M of ERA funds. The work involved building the administrative plan; onboarding, training, and managing staff; and providing reporting and policy support.
- **For the Michigan Department of Environment, Great Lakes, and Energy,** Greg supported the design and advising on implementation of the state's Inflation Reduction Act's Home Energy Rebate program. The work involved identifying applicability for program funds with various project types including multifamily housing, approaches to blending/braiding funds into complex capital stacks, and federal guidance interpretation/compliance. It also involved stakeholder engagement with developers and their architects/engineers.
- **For the State of New York New York Office of Temporary and Disability Assistance (OTDA),** Greg assisted with the policy and program design related to developing, deploying, and maintaining an application, staffing, quality control and oversight, and overall program delivery of $3B in Emergency Rental Assistance Program (ERAP) funds. He helped develop an actionable housing strategy and framework.
- **For the State of South Carolina (SC Housing),** Greg helped administer the statewide program to distribute more than $500M in emergency rental assistance and $144M in homeowners assistance. Greg worked with the client to develop innovative strategies that were highlighted by the White House and National Low Income Housing Coalition, to confirm the funds aided as many households as possible.
- **For the State of Florida,** Greg provided rapid assessment of the statewide emergency rental assistance program, with identified strategies for change management and process improvement.
- **For Travis County, Texas,** Greg assisted the county in establishing policy recommendations and due diligence review of affordable housing projects financed with federal ARPA funds. Greg's role included helping interpret and understand federal policy; project review; developing frameworks, processes, and documents for county use; and providing policy support.

3.8.9 Laura Slutsky, Housing and Homeless Subject Matter Expert

Laura is a leader at Guidehouse in the Housing and Community Solutions practice. She brings over 17 years of public and nonprofit experience in community development, affordable housing finance, disaster recovery, and sustainability. She has expertise in program design and execution including grant management, real estate transactions, stakeholder management, and deploying public funds. Laura supports commercial and public-sector clients with housing policy and programs, affordable housing finance, grants management and community investment strategies. She served in federal and local government positions, always focused on affordable housing, community development, and disaster recovery. In NYC government, she supported CDBG-DR program design and implementation for the Superstorm Sandy housing programs, served as the agency's lead on sustainability and resilience programs, and launched and managed a finance program to support energy efficiency in the preservation of affordable housing.

Degree/Education/Certifications **Years of Experience**

• M.P.A, University of Pennsylvania • B.A., Cornell University	17 Years

Areas of Expertise

- Policy analysis
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Housing policy and programs
- Program and project management
- Grant compliance and monitoring
- Knowledge of new housing construction and related regulatory compliance, including building codes

Relevant Experience

- **For the New York City (NYC) Mayor's Office of Housing Recovery Operations**, Laura served as a policy advisory to deploy Community Development Block Grant- Disaster Recovery (CDBG-DR) for Superstorm Sandy housing recovery funds, provided interagency coordination, supported Action Plan, development of policies and procedures, and HUD monitoring visits.
- **For the U.S. Department of Housing and Urban Development (HUD),** Laura participated in policy work including drafting Notices of Funding availability, reviewing applications, establishing budget, and supporting grantees in implementing funds. Laura coordinated economic development policy, drafted budget proposals, created parameters for grant programs with general counsel, developed external presentations, managed stakeholder engagement, and supported legislative drafting. Specific programs included the housing entitlement programs (CDBG, HOME, CDBG-DR) and a range of programs developed under the American Recovery and Reinvestment Act).
- **For a role in the New York City (NYC) Department of Housing Preservation and Development (HPD**), Laura oversaw the development, launch and implementation of the agency's $23M Green Housing Preservation Program, including managing a pipeline of transactions, establishing policies, leading partnerships with lending institutions and foundations, and leading interagency policy initiatives to integrate energy efficiency, water conservation, health and resilience across program financing. Laura executed real estate closings to deploy public sector affordable housing financing products for approximately 300 units annually, including borrower intake, underwriting, scoping and due diligence. She drafted term sheet for a new program and negotiated terms with nonprofit and private developers. Laura oversaw approval process with the budget office, participated in credit committee, and coordinated with construction division.
- **For the U.S. Department of Urban Development (HUD),** Laura was part of the team on a BPA to support implementation of HUD's $1B loan program, funded by the Inflation Reduction Act (IRA) to support affordable housing projects with energy efficiency and resiliency improvements that impact: energy or water efficiency, enhance indoor air quality or sustainability, implement the use of zero-emission electricity generation, low-emission building materials or processes, energy storage, or building electrification strategies or address climate resilience. The team will provide services to review project plans and financials, providing project management support, developing scopes, and supporting transactions with recipients.

3.8.10 Michael Powell, Fraud, Waste, and Abuse Prevention Subject Matter Expert

Michael is an Associate Director with Guidehouse's Risk and Fraud Services Team where he brings exposure to large scale disaster recovery and mitigation efforts specializing in CDGB-DR, FEMA, and other federally funded programs. He has over 30 years of experience in disaster recovery, community development, and affordable housing, specializing in fraud awareness, deterrence, and prevention in HUD related programs. His expertise extends to applicant and subrecipient management, compliance monitoring, due diligence, program governance, and training to verify that government funds are effectively administered in compliance with program requirements.

Degree/Education/Certifications	Years of Experience

- B.S., Central Missouri State University
- Criminal Investigator Training Program, Federal Law Enforcement Training Center
- Certified Fraud Examiner (CFE)
- Certified Public Accountant (CPA)

30 Years

Areas of Expertise

- Grant compliance and monitoring
- Subrecipient Management
- Compliance Monitoring
- HUD Policy

Relevant Experience

- **For the New York State Emergency Rental Assistance Program,** Michael was the co-lead and was responsible for preparing operational budget plans, monitoring staff utilization, and billing, and designing team building plans to verify client needs are achieved efficiently while maintaining Guidehouse corporate values. Michael trained program Operations Staff and State Executive Program staff focused on the recognition of red flags in financial transactions being processed. He developed a transaction testing program used to establish controls and proactively identify fraudulent activity and served as Transition Manager to develop an organized, structured approach to closeout operations and transfer of historical artifacts, data, and equipment to shut down operations.
- **For the U.S. Department of Housing and Urban Development Office of the Inspector General,** Michael managed the Office of Investigation to rapidly prioritize resource allocation; develop budgets; create performance measures; and direct investigative operations nationally. Michael led and participated in CDGB-DR oversight activities including audit, evaluation, and investigative efforts including Hurricane Katrina, Superstorm Sandy, Puerto Rico Hurricane Recovery, and numerous flood, wildfire, and hurricane recovery efforts. Michael identified and provided guidance on addressing Top Management Challenges through risk identification, loss mitigation, and controls development.

3.8.11 Irene Pasternak, Fraud, Waste, and Abuse Prevention Subject Matter Expert

Irene has over 20 years of experience in the fields of Fraud Risk Management (FRM), Anti-Bribery and Corruption (ABC), Anti-Money Laundering (AML), and international sanctions compliance, investigations, and remediation. Irene managed large scale FRM, ABC, and AML projects for major Financial Institutions, large international corporations, law firms, as well as Federal and State agencies leading investigative and digital technology teams to provide effective and efficient client solutions.

Degree/Education/Certifications	Years of Experience
• M.A., American University • B.A., Tel Aviv University • Certified Fraud Examiner (CFE) • Certified Anti-Money Laundering Specialist (CAMS)	20 Years

Areas of Expertise

- Fraud Prevention Strategy
- Compliance Controls Implementation
- Data-driven Fraud Detection
- Grant Risk Management
- Policy and Procedure Development
- Technology-enabled fraud analytics

Relevant Experience

- **For the Small Business Administration (SBA),** Irene co-led the set up and implementation of fraud prevention and detection for the SBA COVID-19 relief program where she was responsible for the development of policies, procedures, system business rules and fraud flags, training, and oversight over investigative processes to detect fraudulent applications for federal benefits.
- **For the State Emergency Rental Assistance Program (ERAP),** Irene led the design and implementation of compliance and fraud risk management processes and controls to identify, escalate, and investigate applications with potential fraud indicia. She oversaw the development and delivery of fraud training, implementation of queries, network analysis, and machine learning to identify fraud trends and typologies, and execution of investigations of applications with potential fraud flags.
- **For the State Energy Efficiency, Solar for All, Broadband Equity Access and Deployment (BEAD), and National Electric Vehicle Infrastructure (NEVI) programs,** Irene is overseeing fraud, waste, and abuse risk management for a variety of IRA and States funded programs. The work includes fraud risk assessments, evaluation and design of internal controls, sub-grantees / contractor due diligence, review and assessment of financial documentation, and change management recommendations.

3.8.12 Stacey Weinick, CDBG-DR Project Manager

Stacey is a Managing Consultant with extensive experience working with CDBG-DR funding. With 11 years of experience in disaster recovery, she provides oversight for compliance with HUD's CDBG-DR regulations, policies, and guidelines to facilitate successful program implementation.

With experience in both community reconstruction as well as housing, Stacey supports clients with expertise in invoice review, procurement review, and budget analysis. Her knowledge of 2 Code of Federal Regulations (CFR) has led to the successful procurement and bidding process by subrecipients throughout the New York State's Governor's Office of Storm Recovery (GOSR).

Degree/Education/Certifications	Years of Experience
• MSW, Hunter College School of Social Work • B.A., Binghamton University	11 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Project management
- Ability to effectively identify and prevent duplication of benefit
- Policy development

Relevant Experience

- **For New York State Governor's Office of Storm Recovery (GOSR)**, CDBG-DR, as Project Manager, Stacey managed 22 Community Reconstruction projects in the hardest hit areas of New York City with a total budget of more than $60M from bidding to closeout to comply with federal regulations. Stacey provided oversight to GOSR for compliance with CDBG-DR regulations, policies, and guidelines. Stacey made recommendations to the client with regards to project eligibility, procurement, and project compliance based on knowledge of 2 CFR. Stacey provided technical assistance to local government and not-for-profit subrecipients to assist in the implementation of compliant projects. Many of these projects focused on outreach and education to vulnerable communities to provide them resources not only to recover from Hurricane Sandy, but to mitigate economic hardships in the event of a future disaster.
- **For South Carolina Department of Commerce, CDBG-CV,** as Project Manager, Stacey oversees 28 projects, with a combination of Public Services and Public Facilities, being implemented to aid in the economic recovery across the State of South Carolina. She has designed and implemented the application process for a second round of funding which focused on alleviating food insecurity

across South Carolina due to the pandemic. She provides ongoing Technical Assistance to subrecipients with their procurement and reimbursement requests to get funding to hard-hit communities quickly and compliantly. Stacey has held trainings for program stakeholders, many of whom work with rural communities, to rapidly deploy funds and engage the community on aid available to them.

- **For State of Missouri Department of Economic Development**, CDBG-DR and CDBG-MIT, as Project Manager, Stacey led a team in the writing and development of five policy manuals to be used in the direct implementation of various CDBG-DR and CDBG-MIT funded programs including Infrastructure, Housing Counseling, Homeowner Rehabilitation, and both Single and Multi-Family Affordable Housing programs. Stacey served as a Subject Matter Expert (SME) to provide recommendations for revisions to DED Action Plan and existing policies to be compliant with all CDBG cross-cutting requirements as well as to create policies that allow for the most thorough use of funding. Stacey led trainings on the five CDBG-DR programs that catered to both the Grantee as well as potential Subrecipients. The trainings covered general grant policy guidance as well as specific process and procedural information needed to successfully implement projects.
- **For FEMA COVID Wellstar and Allegheny Health Network**, as Project Manager, Stacey provides support to two major hospital systems in navigating the process for FEMA PA reimbursement for expenses related to COVID-19. As both hospitals are unfamiliar with the FEMA funding process, Stacey provides ongoing technical assistance and keeps the client up to date on policy changes and requirements to increase recovery dollars. She also provides stakeholder engagement, establishing that FEMA, State Emergency Management agencies, and hospital executives are aligned on goals and outcomes.

3.8.13 Kristen Manis, CDBG-DR Project Manager (Compliance)

As an Associate Director with Guidehouse's Fraud & Risk Services team, Kristen oversees the New York City Department of Education Monitorship which reviews the DOE's compliance with impartial hearing orders under the terms of the settlement agreement. Kristen has over 25 years of extensive experience providing advisory and investigative services to private and public-sector clients and has expertise in performing complex investigations, business intelligence, and other risk prevention activities.

Degree/Education/Certifications	Years of Experience
• B.A., Long Island University	25 Years

Areas of Expertise

- Grant compliance monitoring
- Fraud and risk investigations
- Case management systems development
- Regulatory reporting and analysis

Relevant Experience

- **For the New York City Department of Education Monitorship,** Kristen is responsible for managing Guidehouse's NYC Department of Education independent auditor engagement of a large public school system as appointed by the United States District Court, Southern District of New York. Responsibilities include the review of injunctive claims related to special education impartial hearing orders. Kristen assisted with the development of a proprietary case management system to expedite the work and facilitate reporting. The system is further being developed to include process automation to incorporate information from impartial hearing orders directly into our case management system, increasing the efficiency of our review of Orders and Action Items. Kristen's additional responsibilities include drafting quarterly reports detailing Guidehouse's findings concerning compliance with the terms of the settlement agreement, responding to the Parties comments to our draft quarterly reports, maintaining the budget, and monitoring staff utilization and billing.
- **For various engagements,** Kristen conducted numerous complex investigations and business intelligence, including international Foreign Corrupt Practices Act (FCPA) investigations, fraud

investigations, asset searching, litigation support, pre-employment screening, and other risk prevention activities and investigations for Fortune 500 companies, private equity firms, and hedge funds. Kristen assisted multinational companies with identifying potential corruption risks, conducted third-party and pre-M&A due diligence, and assessed due diligence programs. Kristen conducted background investigations on entities and individuals relating to prospective business transactions, third-party relationships, investments, internal investigations, and business disputes.

3.8.14 Bruce Roberts, CDBG-DR Project Manager (Procurement)

Bruce has more than 15 years of experience in procurement and logistics. Bruce started his career in the U.S. Marines serving honorably from 2005 to 2013 with two deployments. After completing his military service, Bruce started his state government career where he served as ESF-7 Deputy Logistics Chief for the Department of Management services and as the Disaster Supplemental Nutrition Program coordinator for the Department of Children and Families in the State of Florida. Bruce has established himself as a gifted leader in emergency management for Florida traveling the state to provide logistical support, conduct regional training, and coordinate operational readiness for the state, county, and local governments and their community partners.

Degree/Education/Certifications	Years of Experience
• A.A., Criminology and Sociology, Bethune-Cookman University • Florida Certified Contract Manager • Florida Certified Contract Negotiator • FEMA ICS Courses 100, 200, 230, IS-406, 700, 800, L0311, K0419, 2200, L0146.	15 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Project management

Relevant Experience

- **For Florida Division of Emergency Management (FDEM),** Bruce served as the FDEM Deputy Logistical Chief for the 2024 hurricane season where he provided logistical support on behalf of FDEM.
- **For Florida Commerce,** Bruce led a team to conduct quality control inspections and assessments to facilitate compliance with program guidelines. He traveled across various counties in Florida on short notice to address client needs, providing empathetic, onsite support to individuals navigating recovery programs. Bruce actively listened to clients' concerns, documented their feedback, and established that their voices were reflected in reporting and case management records. He collaborated with stakeholders to address case-specific issues, improve processes, and support successful resolutions, all while maintaining accurate documentation to establish accountability and transparency.
- **For Florida Digital Services (FLDS),** Bruce supervised the Procurement and Contracts section for FLDS. He reviewed and complied with F.S. 282 for FLDS. Bruce served as Procurement Officer for

all solicitation types and trained staff on F.S. 287 and the solicitation and contract process. He monitored and supported staff in the creation of My Florida Market Place (MFMP) requisitions. He provided ESF-7 support at the Florida State Emergency Operations Center (SEOC), which included field work with hurricanes and COVID-19 response and served as State Lead on first federal COVID-19 vaccination site in Miami.

- **For the Department of Management Services,** Bruce served as a Subject Matter Expert for MyFloridaMarketPlace (MFMP) Sourcing/Analysis modules. He updated all MFMP applications newsfeed and maintained website with content and updates. Bruce developed and implemented accurate project timelines. He created and administered complex reporting for agency customers and delivered training for agency customers on the MFMP system. He provided customer service to the internal and external customers and provided ESF-7 support at the SEOC, including fieldwork following Hurricanes Michael and Irma.

3.8.15 Faraz Shamsi, CDBG-DR Project Manager (Reporting)

Faraz is an Associate Director with Public Sustainability Practice. He brings deep experience leading system implementations for grant management purposes. These tools, both off the shelf and custom built, are designed to streamline the grant management process. This ranges from reporting expenses and outreach to monitoring and compliance and providing an audit trail.

Degree/Education/Certifications	**Years of Experience**
• B.S., Information Technology, Pennsylvania State University • Certified Scrum Master • Certified SAFe Agilist	19 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Project management

Relevant Experience

- **For the State of Georgia's IRA Home Energy Rebates Program,** Faraz is currently leading the technology implementation across a large U.S. state for designing and implementing two programs that will disperse over 100,000,000 in funds across the State. The program will require coordination with DOE, utilities, call centers, "boots on the ground," the program administrators, and the payment systems. His involvement in the State's IRA includes key contributions to program design and marketing, alongside serving as the technology lead. In this role, he collaborates with PNNL and the Department of Energy (DOE) to guide implementation plans, develop privacy and security blueprints, and oversee system design. Additionally, Faraz manages the software vendor responsible for rebates, payments, and manages the reporting workstreams. Faraz also serves as an advisor to three other states on the setup of similar programs, particularly in the areas of implementation, payments, security frameworks, and meeting technology requirements.
- **For a state Emergency Rental Assistance Closeout,** Faraz led a team of different team members to help a large US State and Guidehouse to help the State with quarterly reporting and starting of the internal and external close out processes. ERAP is a federally funded rental assistance program, which provided more than $335 million in financial assistance to over 55,000 households experiencing financial hardship because of the COVID-19 pandemic.
- **For a Homeowner Assistance Fund Application Management,** Faraz led a team of policy makers and Reviewers to implement and manage the applications and payments under the HAF fund for a large US State. He supported end-to-end administration of over $3 Billion of federal

funding for various agencies across the Stat. This included: program design, configuration deployment and maintenance of an applicant facing cloud-based grant management platform, operations, staffing, providing quality control and oversight, grant maximization, communication strategies, compliance, and payment integration with the State's payment system (SCEIS). The project concluded with over $2.7B paid out to over 150k diverse recipients. Rapid setup and launch of applicant and review portals within weeks of being retained; Stood up a 600+ member review and call center team to support program review operations and applicant support services.

3.8.16 Andrea Mannino, CDBG-DR Project Manager (Housing)

Andrea is a Managing Consultant in the Housing and Community Solutions Group at Guidehouse. She has worked in the public, private, and nonprofit sectors over the past 20 years. She has worked closely with state and local governments in successfully advocating for more effective policies, programs, and legislation to strengthen communities for all community members.

Degree/Education/Certifications

- M.P.A., University of Pennsylvania
- Master of Economics, North Carolina State University
- B.S., Environmental and Resource Economics, University of New Hampshire
- Project Management Professional Certification (PMP)

Years of Experience

20 Years

Areas of Expertise

- Grants management
- Housing policy and programs
- Strategic housing and community planning
- Program management
- Research and evaluation
- Economic development

Relevant Experience

- **For the Delaware Division of Services for Aging and Adults with Physical Disabilities (DSAAPD), Home Modification Program,** Andrea served as manager, providing technical assistance to design and implementing a new state level home modification program. Andrea interviewed nonprofit organizations and state and city governments on their home repair and home modification programs that operate within Delaware. These interviews were used to inform statewide program design and lessons learned for dealing with potential program challenges. She presented and led discussions at monthly advisory committee meetings with Guidehouse colleagues. These reports and discussions informed us of the goals of the home modification program and provided insights into design considerations. Additionally, Andrea crafted a program design framework with the dual purpose of addressing home modification needs of low-income senior citizens and adults living with disabilities and efficiently disbursing a one-time increase in federal funds ahead of the spending deadline.
- **For the New York City Housing Authority (NYCHA),** Andrea served as a business analyst where she led sessions with NYCHA staff to learn about their business processes, pain points, and their needs from the new resident cast management system. She reviewed forms, management manuals, and NYCHA shared materials to learn about NYCHA's operations and how staff, residents, and external stakeholders interact with NYCHA systems and the tenancy life cycle. Andrea led 34 business requirements gathering sessions with NYCHA staff, which included walking through various processes conducted by NYCHA staff with demonstrations in the current NYCHA

systems. Additionally, Andrea led 12 sessions for gathering future stat requirements, including identifying areas for change in the future and ideating with NYCHA staff on how to increase business process efficiencies.

- **For the Commonwealth of Pennsylvania,** Andrea served as County Engagement Manager, where she helped provide technical assistance to the Department of Human Services (PA DHS) in administering the state's $1.2B in allocated emergency rental assistance (ERA) funds. Andrea led and/or organized monthly trainings on Treasury policies and best practices to subrecipients administering the program to increase operational efficiencies and program effectiveness. She developed a longer-term housing stability approach for communities after ERA funds are no longer available. Additionally, she mapped steps for the state to provide communities ongoing technical assistance to reduce evictions. The four-part approach focused on establishing and expanding case management, legal representation, landlord tenant mediation, and court-based eviction prevention solutions.

3.8.17 Juliann Bertone, CDBG-DR Project Manager

Juliann is a seasoned CDBG-DR professional with extensive experience in HUD-funded disaster recovery and mitigation programs. As a Program Manager, she specializes in CDBG-DR, HOME-ARP, and other federally funded grant programs, facilitating policy compliance, subrecipient oversight, and program execution in alignment with HUD regulations and 2 CFR Part 200. She leads quality improvement initiatives, facilitating program design, implementation, and monitoring to increase funding impact. Her expertise extends to subrecipient management, compliance monitoring, training, and technical assistance, establishing that local governments and non-profits effectively administer CDBG-DR funds while meeting federal requirements.

Degree/Education/Certifications	Years of Experience
• M.A., Global Leadership & Sustainable Development, Hawaii Pacific University • B.S., Integrated Marketing Communications, Ithaca College	12 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Proficient in the use of the HUD Disaster Recovery Grant Reporting System (DRGR)
- Project management

Relevant Experience

- **For Puerto Rico Department of Housing,** Juliann served as a Portfolio Manager for Puerto Rico's CDBG-DR programs, overseeing a $50M portfolio that addressed the needs of the island's most vulnerable populations through initiatives like the Social Interest Housing Program and Housing Counseling Program. She led program design, subrecipient oversight for six HUD-certified Housing Counseling Agencies, HUD monitoring support, change management, and marketing efforts, which resulted in 43 non-profits applying for Social Interest Housing Program funding, while also establishing reporting processes to keep stakeholders informed and aligned with program goals.
- **For Terrebonne Parish Consolidated Government,** Juliann led CDBG-DR grant application development for the Resilient Communities Infrastructure and Hometown Revitalization programs, including outreach, unmet needs assessments, and project development to align with program requirements.
- **For City of Nashua, New Hampshire,** Juliann serves as the Program Manager for the City of Nashua, New Hampshire's $1.6M HOME-ARP allocation. She assists the client with program implementation, including policy and compliance, sub-recipient oversight, monitoring, and reporting.

3.8.18 Taylor Burandt, CDBG- DR Planning and Policy Manager

Taylor is a Managing Consultant in Guidehouse's State and Local Government practice. She previously worked in the public sector on projects related to city management, transportation, utility billing, and public works operations. In her academic career, Taylor researched the policy implications of autonomous vehicles, intelligent transportation systems, and smart city initiatives. Most recently, she quantified transit accessibility by developing an index including weighted areas of concern, such as actual bus time performance and walkability. While at Guidehouse, Taylor focused on organizational assessments, grant management and compliance, process evaluation and redesign, data analysis, and program implementation and management.

Degree/Education/Certifications	Years of Experience
• M.S., Public Policy and Management, Carnegie Mellon University – Heinz College • B.A., Political Science and Legal Studies, Hamline University • Project Management Professional (PMP) Certified	9 Years

Areas of Expertise

- Business process redesign
- Grant application and program assessment
- Grant compliance and monitoring
- Technical assistance
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations

Relevant Experience

- **For the Governor's Office of Storm Recovery (GOSR),** Taylor participated in the business process redesign efforts of the Community Reconstruction & Infrastructure (CR&I) department. Through this work, Taylor developed the Contract Amendment and Change Order standard operating procedure through multiple staff interviews and working sessions. She also developed training materials and led training sessions for all CR&I staff for 10+ topic areas related to grants management. Additionally, she contributed to the maintenance and improvement of previously developed procedures and documentation. Namely, Taylor continued to monitor the Project and Subrecipient Closeout processes. The monitoring included consistent communications with staff, leading the corresponding changes to the standard operating procedure or SharePoint workflow process, and providing staff with all the resources necessary to complete the process. In addition to the closeout processes, Taylor led the auditing process of 150+ projects to maintain CDBG-DR and state compliance for the projects and subrecipients within the program. Lastly, Taylor assisted with the regular financial and project management reporting which included the development of closeout trackers, the analysis of various financial metrics (grant management, forecast/trends analysis, budget management, etc.), and any other ad hoc request from the client team.
- **For New Jersey Transit (NJ TRANSIT)**, Taylor primarily participated in the benchmarking activities for the agency. NJ TRANSIT sought to understand how they compared financially to other peer agencies, including back-office financial practices. Taylor developed a data collection template, and interview guide, identified and interviewed peer agencies, synthesized both quantitative and qualitative findings, and presented NJ TRANSIT with a synopsis. Additionally, Taylor incorporated the benchmarking data into both the current and future state assessments to better inform the findings and recommendations within the deliverables.
- **For the New York Metropolitan Transportation Authority (MTA),** Taylor contributed to two work streams in MTA's modernization of their timekeeping system. First, she conducted in-depth research regarding the leading practices of implementing a biometric timekeeping system. She also assisted in conducting peer agency interviews to compare leading practices with current procedures. Taylor assisted in the thorough analysis of labor agreements and documented key findings so they may be

implemented into the future biometric timekeeping system.

- **For the Metropolitan Transportation Authority (MTA)**, Taylor was a part of a team that assessed the six customer-facing contact centers. She supported the team by conducting leading practice research on centers of excellence, as well as synthesizing the findings from the interview processes. Taylor assisted in the development of future state solutions as well as an implementation roadmap.
- **For Baltimore County Department of Housing and Community Development (DHCD)**, Taylor is providing project oversight and management over three workstreams. First, Taylor facilitated the collaborative grant application for HUD's PRO Housing grant. She also provided budget analysis for the grant request amount. Additionally, she provided review and writing support for the grant document. Second, Taylor is contributing to the assessment of DHCD's Housing Finance program. Specifically, she has conducted research in gaps of financial programs that DHCD is or is not using and is currently providing review and direction for the current state assessment and future state recommendations deliverables. Third, Taylor is contributing to the assessment of DHCD's voucher administration programming. Taylor conducted multiple stakeholder interviews and quantified the findings, conducted research into all Maryland counties that offer voucher programs to benchmark DHCD's performance, developed process maps to outline existing processes and identify gaps, and conducted leading practice research for public housing authorities.

3.8.19 Noura Chbeir, CDBG- DR Planning and Policy Manager

Noura is a Managing Consultant in Guidehouse's State and Local Government practice and has over 7 years of experience in strategy, data analysis, and public policy. She has significant experience working with state and local government agencies on federal funding strategy and regularly supports state and local governments as they navigate complex grant eligibility issues. Specifically, Noura has in-depth knowledge and experience in state and federal government, federal regulatory practice, and healthcare. She's transferred this to technology systems for state and local government, successfully leading three Grants Management Technology Go-Lives. Prior to joining Guidehouse, she managed the data analytics and operations of a healthcare company of 200+ across 22 states.

Degree/Education/Certifications

- M.A., Public Policy, University of Chicago
- B.A., Harvard University

Years of Experience

7 Years

Areas of Expertise

- Financial planning and budgeting
- Public administration
- Compliance and monitoring
- Grant compliance and monitoring

Relevant Experience

- **For the City of Chicago Office of Budget and Management,** Noura oversees Policy and Compliance, Data Management, and Reporting workstreams. Noura led the strategy and interpretation of key federal guidance to support the City in meeting Obligation and Expenditure grant deadlines. This required collaboration with the City's finance and legal stakeholders for a unified approach, ensuring $151M in funds complied with the Treasury deadline for obligation and were not required to be returned. Additionally, in her role leading the reporting workstream, Noura streamlined federal reporting and complied with federal regulations. As of November 2024, Noura has overseen the development of four quarterly reports and one annual report to the U.S. Treasury successfully, and the development of communications documents to support the Office of Budget and Management in translating complex reports to the general public. For city reporting, Noura designed and implemented monthly reporting to the City Council to support transparency efforts to the legislature. Additionally, Noura oversaw the development of "impact" reports, which translated the output and outcomes of each of the 50 ARPA community programs for the city to tell the story of each program's progress and each Chicago ward's realized benefits. Noura and team led the development, design, and go-live of public-facing website and dashboards to communicate the impact and story of ARPA programming of Chicago's $1.887B SLFRF allocation. Within Policy & Compliance, Noura supported the development of a compliance oversight approach and in business process re-engineering for core compliance and grant activities, such as Subaward Payment, Risk Assessment, and Subaward Issuance/Procurement. This required stakeholder engagement, a prioritization framework for identified opportunities, and change management to facilitate smooth roll-out across the organization.

- **For Cook County,** Noura oversaw the ARPA reporting workstream, which produces Treasury and County-level reporting. As the project's compliance and reporting SME, Noura has led the production or review of CRF, SLFRF, and LATCF-required reports. Cook County is a Tier 1 recipient of SLFRF funds, so it sees the most rigorous reporting requirements. Noura is fluent in data review (fiscal or programmatic) and expenditure reconciliation and consistently provides the most precise analysis for the client. To support Cook County's Performance Reporting efforts, Noura developed a metrics ideation and review process for approximately 70 programs. This was an interdepartmental effort with many stakeholders. In doing so, Noura led the development of "County Impact Metrics" which are a standardized set of impact KPIs for all programs to reference, allowing for convenient collection and aggregation across the County's initiatives. Noura further supported the development of a salesforce-based technology platform for the grants management of ARPA programming as the content SME. In these spaces, Noura advocated for the County in designing object models, data templates, and system workflows that best suit the County. Noura is proficient in collecting and "translating" business requirements to technology requirements. For Cook County, she led requirements-gathering sessions across 6 departments – resulting in over 220 user stories. Over time, these user stories will create a technological space that will uplift and empower County Staff to facilitate active and compliant program management, easing administrative burden. Noura has also supported Cook County's efforts to create dashboards for ARPA programs and has experience with PowerBI and Tableau.

3.8.20 Henry Walker, CDBG-DR Planning and Policy Staff

Henry is a highly skilled Senior Advisor and Program Manager with 23+ years of disaster response and recovery experience. He is a Subject Matter Expert in FEMA PA, Hazard Mitigation, and CDBG-DR programs, with extensive experience in risk reduction, reconciliation, and program compliance. Henry has reconciled $75M+ in CDBG program audits, inspected 8,000+ damaged structures, and performed risk assessments for multimillion-dollar CDBG programs. Recognized for building coalitions and leading diverse teams, he has advised state and federal clients, including NY DHSES, NCEM, GOHSEP, and FEMA.

Degree/Education/Certifications	**Years of Experience**
• B.A., Business Administration, Texas Southern University • FEMA Emergency Management Institute (Continuing Education)	23 Years

Areas of Expertise

- FEMA Public Assistance (PA) & Hazard Mitigation
- CDBG-DR Program Oversight & Risk Assessments
- Disaster Housing & Site Inspections
- Strategic Planning & Program Evaluation
- Financial Reconciliation & Audit Preparation
- Stakeholder Engagement & Team Leadership

Relevant Experience

- **For Emergent Risk Solutions,** as a State Applicant Liaison / Consultant, Henry supported NCEM with Tropical Storm Helene PA recovery operations. While at Emergent Risk Solutions, Henry also reviewed $5B+ in PA grants; guided high-profile applicants including Northwell Health.

- **For Avanti Technologies,** as Project Director, Henry directed $72M+ PA project in Vieques; applying Section 428 policies.
- **For NYC DDC,** as a Project Director, Henry oversaw the Build It Back Program change orders, QC, and compliance.

3.8.21 Candice Mahoney, CDBG- DR Planning and Policy Staff

Candice has more than 15 years of experience with CDBG rules and regulations, to include policy development for local government and preparing HUD Environmental Review Records. Areas of expertise include disaster recovery, grant management, grant research, CDBG DR, CDBG-MIT, compliance and reporting, environmental reviews, and CDBG Entitlement.

Degree/Education/Certifications	Years of Experience
• M.H.A., Healthcare Administration, University of Houston at Clear Lake • B.A., Political Science, Louisiana State University	15 Years

Areas of Expertise

- Project Management
- Environmental Reviews
- Contract Management
- CDBG-DR Policy
- HUD Housing Counseling
- Subrecipient Management
- Financial Controls
- Budget Development
- Stakeholder Engagement

Relevant Experience

- **For the Louisiana Office of Community Development,** serving as a Senior Grant Manager, Candice provides CDBG compliance and project implementation for drainage projects in the City of West Monroe and Village of Clarence.
- **For the Parish of East Baton Rouge**, serving as Senior Grant Manager, Candice developed policies and procedures for all aspects of entitlement programs and ensured program compliance with applicable grant requirements. Candice provided general technical assistance on all entitlement and disaster recovery programs.
- **For various Louisiana parishes**, Candice prepared environmental assessments for infrastructure and public facility projects and assisted in the development of the CDBG-DR Action Plan. Candice also prepared Environmental Assessment for LWI drainage projects and developed policies and procedures for all aspects of the CDBG program. Candice assisted in contractor procurement process. Candice ensured cost reasonableness of change orders and contract amendments. Candice prepared final project completion and monitoring reports. Candice coordinated project schedules from environmental clearance through engineering and construction administration to ensure that critical path milestones were met on time, including labor compliance. Candice also prepared monthly status reports and guided development and review of plans and specifications. Candice helped ensure cost reasonableness of change orders and contract amendments. Candice processed requests for payment and prepared final project completion and monitoring reports.

3.8.22 Doug Veivia, Financial Compliance Manager

Doug is an Associate Director in the New York office of Guidehouse's Risk and Fraud Services practice. His Guidehouse experience includes managing fraud risk in a variety of government sponsored loan and grant programs. Doug has nearly 30 years' F.B.I. investigative and corporate compliance experience conducting financial crime and compliance investigations both domestically and internationally. Doug has served as a senior compliance officer of a Fortune 50 financial services firm, overseeing design and implementation of frameworks to mitigate legal, regulatory, and fraud risks. His combined enforcement and compliance experience enables him to identify and mitigate prioritized risks commensurate with legal and regulatory expectations. He understands the challenges faced by geographically and culturally diverse organizations and is aware of the necessary nuance for doing business globally. His experience involves working with public and private officials from North America, Europe, Middle East, Africa, South America, and Asia.

Degree/Education/Certifications

- Chemistry, Ph.D., Clarkson University
- Chemistry, B.S. Clarkson University

Years of Experience

30 Years

Areas of Expertise

- Fraud and risk mitigation
- Financial compliance oversight
- Grant Compliance Oversight
- Fraud Risk Management
- Fraud and risk mitigation
- Financial compliance oversight

Relevant Experience

- **For a State Energy Efficiency Rebates Program,** Doug leads a team responsible for the development and implementation of a fraud risk mitigation program. Doug identified inherent risks and recommended mitigating controls and consulted on program design to integrate the controls into program design. He designed a risk and control matrix for the program to document the risks and corresponding controls. He also developed criteria and procedures for escalation of control red flags and drafted investigation procedures to govern the review processes. Doug has extensive experience in the design and implementation of risk mitigation frameworks consistent with the standards outlined by the U.S. Government Accountability Office and expected by the D.O.E. Office of Inspector General. He has shared this expertise and guided the development of Consumer Protection Plans for multiple related engagements for other Guidehouse clients.
- **For a State Energy Efficiency Rebates Program,** Doug led a review of a client's pre-existing energy efficiency rebated programs and their planned integration of Inflation Reduction Act funding. This review consisted of fraud risk assessments of multiple programs and identification of potential control gaps and deficiencies. The engagement provided risk maps, control inventories, and recommendations to address potential control gaps.
- **For a State Pandemic Rental Assistance Program,** Doug led a team of fraud investigators responsible for reviewing applications for rental assistance which exhibit indicia of fraud. The team leveraged data analytics and machine learning to efficiently identify applications exhibiting indicia of fraud and potential collusion among co-conspirators. Doug was also responsible for maintaining governance and procedural documents for the monitoring, compliance, and fraud team to accurately reflect procedural and policy directives and initiatives.
- **For a Federal Pandemic Relief Program,** Doug led a team of fraud investigators responsible for reviewing loans granted to those claiming significant financial harm during the COVID pandemic. Loans identified with potential indicia of fraud or ineligibility were reviewed by fraud investigators and referred to the client when fraud was identified. The team leveraged data analytics and technology platforms to efficiently identify loans exhibiting indicia of fraud and potential collusion

among co-conspirators.

- **For the F.B.I., as a Supervisory Special Agent,** Doug conducted and supervised financial crimes investigations of corruption, money laundering, health care fraud, corporate fraud, securities fraud, mortgage fraud, and government fraud. He served as the program manager for all financial crime and corruption investigations in New Jersey and was responsible for conducting threat and risk assessments to manage staff and budget allocation. Throughout his tenure, he effectively partnered with domestic and international authorities in regulatory investigations to ensure balanced outcomes which properly credited effective risk management programs. He led a multi-agency task force investigating fraud in major government programs designed to provide disaster relief. He conducted several evaluations of compliance and risk programs on behalf of DOJ to evaluate the need for an independent monitor. He has extensive experience working with whistle-blowers, Qui Tam relators, and court-appointed monitors.

3.8.23 Darian Cole, Financial Compliance Manager

As a Managing Consultant with Guidehouse's Risk and Fraud Services team, Darian has over 20 years of experience in the administration and delivery of government programs and services. Darian is a seasoned Fraud Specialist with in-depth expertise in the realm of Unemployment Insurance Fraud, Benefit Payment Control (BPC), Benefit Accuracy Measurement (BAM) and Integrity Operations. His comprehensive knowledge extends to various aspects of detecting, preventing, and mitigating fraudulent activities within the UI program. Darian is proficient in implementing robust control measures and ensuring the integrity of benefit payments, safeguarding against potential fraudulent schemes. His experience includes project management, fraud risk management, business process improvements, requirements analysis, training development and facilitation, quantitative and qualitative data analysis and reporting, and strategic planning.

Degree/Education/Certifications	Years of Experience
• B.S., Alabama A&M University • MBA, Shorter University	20 Years

Areas of Expertise

- Fraud prevention, detection, and risk assessment
- Risk assessment and internal controls
- Financial and operational due diligence
- Quality control and compliance oversight

Relevant Experience

- **For the Universal Service Administrative Co.,** Darian served as a Fraud SME leading a comprehensive risk assessment to identify program vulnerabilities, recommend targeted mitigation strategies, and strengthen overall fraud prevention and detection efforts.
- **For the Washington Employment Security Department,** Darian served as a Project Manager leading a team in conducting customer journey mapping to enhance equitable access for all unemployment claimants. Darian oversaw project planning, stakeholder engagement, and execution, ensuring alignment with agency goals. Provided subject matter expertise on unemployment insurance processes, identifying pain points and opportunities for improvement. Darian facilitated workshops, analyzed claimant experiences, and developed actionable recommendations to streamline service delivery and improve accessibility.
- **For the United States Department of Labor, Employment & Training Administration (ETA), Office of Unemployment Insurance (OUI),** Darian during Phase 1 led a team of Fraud SMEs focused on fraud prevention and detection improvements, resulting in 137 tailored fraud recommendations for program improvement. Darian conducted comprehensive fraud risk assessments across multiple business units, identifying vulnerabilities and recommending remedial actions to mitigate potential losses. Darian identified and evaluated potential risks associated with

business processes, systems, and controls, providing recommendations for improvement to enhance overall risk management effectiveness. During Phase 2, Darian served as a Fraud Specialist/Unemployment Insurance Specialist, actively engaged in deploying Behavioral Insights (BI) improvements at important touchpoints throughout the Unemployment Insurance claims process aimed to elevate the customer experience. Darian collaborated with stakeholders to gather and document business requirements, including functional and non-functional requirements, to ensure a clear understanding of project objectives. Darian analyzed existing business processes, workflows, and systems to identify areas for improvement and optimization. Darian developed Standard Operating Procedures and guidelines for new processes and systems, outlining step-by-step instructions, roles and responsibilities, and performance metrics to ensure consistency and compliance.

- **For the Department of Employment Services/DC Government,** Darian was responsible for ensuring the accuracy of unemployment insurance benefit payments issued by DC Government. These duties included conducting audits, reviewing claims, analyzing data, verifying eligibility, identity verification, identifying discrepancies, and mitigating fraudulent activities within the UI program. Analyzed patterns and trends in fraudulent activities, including unauthorized account access, phishing schemes, and identity theft, to develop proactive detection strategies. Darian collaborated with other departments to improve processes and policies related to benefit distribution. Prepared detailed reports and presentations for senior management and stakeholders, providing insights into emerging fraud trends, key risk indicators, and mitigation strategies. Darian assisted in the development and maintenance of risk management framework, policies, and procedures to facilitate consistent and effective risk management practices.
- **For the Georgia Department of Labor,** Darian managed a team of investigators and analysts in performing audits, investigations, and reviews of alleged fraudulent unemployment insurance claims, with a specific focus on cases related to identity fraud. Darian collaborated with state and federal agencies, law enforcement, and other stakeholders to identify and prosecute cases of fraud. Darian analyzed data and trends to identify areas of risk and developed strategies to mitigate them. Darian managed and monitored the recovery of overpaid benefits through various collection methods. Darian conducted regular training sessions and workshops to raise awareness among employees about fraud risks and prevention measures, resulting in a more vigilant and proactive workforce. Darian collaborated with cross-functional teams to enhance fraud detection systems, to improve accuracy and efficiency.

3.8.24 Charles Arnold, Financial Compliance Staff

Charles is a Senior Consultant with Guidehouse's Financial Crime, Fraud, and Investigative Services group. Charles has three years of experience providing fraud investigation, fraud risk management, and court-appointed monitorship services to public sector clients. Charles is a retired FBI Supervisory Special Agent with 30 years of experience as a criminal investigator and attorney.

Degree/Education/Certifications	Years of Experience
• J.D., University of Houston • B.S., Sam Houston State University • Certified Fraud Examiner (CFE) • Licensed Attorney (Texas – Inactive)	30 Years

Areas of Expertise

- Fraud risk management and investigation
- Risk assessment and internal controls
- Financial and operational due diligence

- Quality control and compliance oversight

Relevant Experience

- **For the Georgia Environmental Finance Authority (GEFA),** Charles assisted in the design and implementation of the fraud risk management and monitoring and compliance programs for the implementation of the IRA energy efficiency rebates programs. Charles investigates and resolves instances of potential fraud against the program and delivers fraud risk training.
- **For the New York State Energy Research and Development Authority (NYSERDA),** Charles conducted fraud risk assessments of the agency's energy efficiency rebate programs with extensive reviews of NYSERDA's policies and procedures, interviews of key personnel, the development of maps detailing the programs' fraud risks and internal controls, and recommendations for improvements.
- **For the New York Emergency Rental Assistance Program,** Charles investigated potential fraud and served in a quality control capacity over the investigation of potential fraud in all components of the program.
- **For the Small Business Administration,** Charles identified millions of dollars in potentially fraudulent applications in the SBA Payroll Protection Program. Charles analyzed extensive business and financial records to identify misrepresentations and calculate potential fraud losses.
- **For the Washington State Department of Commerce,** Charles conducted extensive reviews of potential contractors seeking to participate in the implementation of the federally grant-funded Broadband Equity, Access, and Development Program. The reviews assessed the potential contractors' financial and operational suitability for participation in the program.
- **For the Texas Department of Insurance Fraud Unit,** Charles conducted complex investigations of criminal activity involving engaging in the unauthorized business of insurance, health care fraud, consumer fraud, and large-scale claims fraud.
- **For the Federal Bureau of Investigation,** Charles conducted investigations of all forms of white-collar crime, including mail/wire fraud, fraud against the government, corporate fraud, and public corruption. Charles supervised a large white collar crime squad responsible for the investigation of all forms of white-collar crime. Charles also served as the Public Corruption Program Coordinator for the San Antonio Division.

3.8.25 Alena Edmonds, Financial Compliance Staff

As a Senior Consultant with Guidehouse's Risk and Fraud Services team, Alena is a compliance and fraud investigation professional with over seven years of experience. She has conducted and overseen several sensitive and complex specialized investigations involving violations of Emergency Relief funding programs, and has worked on high-profile government projects involving audits, fraud prevention, and regulatory compliance.

Degree/Education/Certifications	Years of Experience
• J.D., American University Washington College of Law • B.S., Business Administration at Auburn University • Certified Fraud Examiner (CFE)	7 Years

Areas of Expertise

- Fraud and risk mitigation
- Financial compliance oversight
- Grant Compliance Oversight
- Fraud Risk Management
- Fraud and risk mitigation
- Financial compliance oversight

Relevant Experience

- **For the City of New York Department of Education,** Alena is currently assigned to the Department of Education (DOE) project, which is a large-scale independent audit engagement resulting from a class action settlement involving the public education school system. Alena is responsible for reviewing and analyzing injunctive claims related to compliance with special education impartial hearing orders. This engagement operates under regulations consistent with the Individuals with Disabilities Education Act (IDEA).
- **For the Washington State Broadband Office,** Alena assisted in the Washington State Broadband Office (WSBO) first application round for the $1.2 billion in Broad Equity, Access and Deployment Program (BEAD) funding. The BEAD program aims to provide fiber optic cable to provide fast, reliable, and less expensive internet service to rural areas. Alena conducted due diligence investigations and research on the applications to determine any potential fraud risks.
- **For the State of New York Office of Temporary and Disability Assistance,** Alena managed the daily activities of a team of seventeen Fraud Investigators for a Covid-based project as a Team Lead. Alena conducted quality control of their work to ensure the accuracy of each investigation for the client. Alena trained and mentored Fraud Investigators to assess potential risk factors with specific criteria and reviewed thousands of applications. Alena also provided constructive feedback to Investigators relating to the quality of their case investigations, procedure guidance, and writing quality. Alena reviewed both small and large dollar files submitted by Tenants and Landlords to assess compliance with specific criteria. Alena performed database and open-source research to identify items of potential concern on Tenants and/or small and large Landlords and Property Management companies. Once the project was downsized, Alena moved on to become part of the Transition Team to aid with transitioning the project over to the client.

3.8.26 Chris DeHanas, Engineering Manager

Chris is an Associate Director in Guidehouse's Capital Projects & Infrastructure practice. Chris supports public and private sector infrastructure-intensive organizations to meet business objectives. Chris combines expertise in strategic planning, infrastructure sustainability and resiliency strategy, capital planning and portfolio optimization, federal grants management, and utility asset management.

Degree/Education/Certifications

- M.B.A., New York University Stern School of Business
- M.S., Environmental Engineering & Science, Stanford University
- B.S., Civil Engineering, University of Virginia
- Professional Engineer (PE), Environmental, Maryland
- Project Management Professional (PMP)

Years of Experience

15 Years

Areas of Expertise

- Infrastructure and Public Facilities Projects
- Public Services Facilities and Programs
- Hazard Mitigation Projects
- Grant compliance and monitoring
- Knowledge of new housing construction and all related regulatory compliance, including building codes

Relevant Experience

- **For a Hydrogen Hub multi-billion-dollar hydrogen hub (H2Hub)**, Chris led the Engineering, Procurement, Construction, and Operations (EPC-O) workstream for the development of a funding application to the Department of Energy including a public-private partnership across three states consisting of projects from clean hydrogen production through offtake and end use. Chris is

supporting H2Hub organizational and governance design, including identification of interparty roles and responsibilities. Chris led the development of an Integrated Project Schedule (IPS), workplan, detailed EPC-O narrative including technical project description and technology readiness description, budget justification workbooks, and other supporting materials.
- **For the DC Water Buried Sewer Infrastructure Asset Selection and CIP Prioritization program**, Chris managed the development of documentation of business processes for asset selection, project prioritization, and project selection for inclusion in the annual Capital Improvement Program (CIP) for DC Water Buried Sewer Infrastructure.
- **For the City of Baltimore Department of Public Works**, Chris served as a project Technical Lead for the creation of a multi-criteria decision analysis model to optimize $300M annual capital portfolio of water, wastewater, and stormwater projects against triple-bottom-line criteria. Chris supported the city to renegotiate regulatory compliance deadlines, revise rate structures, and increase investments in water infrastructure.
- **For the DC Water Planning and Engineering Services for the Sewer System**, Chris served as Deputy Program Manager and was responsible for day-to-day administration of an engineering services program, including client engagement management, cross-functional team coordination, identifying client needs, and schedule and quality management activities.
- **For a consortium of subrecipients,** Chris supported them in the U.S. Department of Energy Grid Resilience and Innovation Partnership (GRIP) award in a readiness assessment to administer subawards and maintain compliance. Assessing current state capabilities and award compliance requirements, identifying gaps in policies and procedures, and supporting development of compliant policies and procedures, governance, systems, and roles and responsibilities.

3.8.27 Liz Hiddemen, Engineering Manager

Liz is a Director the Capital Projects & Infrastructure practice and is based in St. Petersburg, Florida. With more than 12 years of experience in engineering, construction management, grants management, and project management, Liz provides solutions throughout the full capital project and infrastructure lifecycle from strategy to turnover. She is a licensed professional engineer in the state of Virginia and a certified sustainable infrastructure professional (ENV SP). She implements leading practices to help clients deliver quality capital programs on budget and on schedule. Liz has provided for clients in strategy, execution and closeout of numerous grant programs including HUD CDBG-DR, FEMA PA, Hydrogen Hub, Grid Resiliency Grant, etc.

Degree/Education/Certifications	Years of Experience
• B.S., Civil Engineering, Lehigh University • Professional Engineer • Sustainable Infrastructure Professional (ENV SP)	12 Years

Areas of Expertise
- Infrastructure engineering and construction management
- Grant compliance and monitoring
- Strategic analysis and planning
- Project management
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations

Relevant Experience
- **For the City of Joplin, Missouri**, Liz managed the infrastructure engineering and construction projects as part of an overall capital spending plan developed to responsibly manage the $158M CDBG-DR funds given by HUD. This included monitoring construction schedule, cost, quality, and compliance.
- **For a Florida Utility**, Liz supports thorough analysis of the Infrastructure Investment & Jobs Act. The analysis includes helping the client understand the structure of the funding program, eligibility

requirements, and potential value for projects. Tasks include developing a master list of potential funding opportunities that align with the client's strategic business priorities and developing a framework to help evaluate and prioritize those funding opportunities to achieve long-term business goals.

- **For the Midwest Hydrogen Hub**, Liz supported the development of integrated budget and schedule documentation for a major infrastructure hub. Liz is the lead for grant compliance and has helped standup up a program management office, developed policy and procedures, provided compliance guidance, and performed technical reviews.
- **For a Southeast Utility**, Bipartisan Infrastructure Law (BIL) Strategy, Liz provided support in their analysis of the Infrastructure Investment & Jobs Act including understanding the program's structure and requirements, identifying suitable funding opportunities, developing evaluation and prioritization frameworks, and providing grant application roadmaps and next steps. She documented workflow and business process for grant applications from identification to submission. Liz performed an assessment of existing business process to identify and develop a grants management office.
- **For Cook County**, Liz prepared submissions for reimbursement from FEMA PA. This included documenting and assessing data for labor and non-labor expenses for all county departments including hospital systems and department of emergency management.

3.8.28 Brandon Kanatani, Engineering Staff

Brandon specializes in project management, grants management, and quality control. He has 20+ years of experience in Grant Management, Disaster Services, Construction Management, and Quality Control. He has supported 15 FEMA disaster declarations, and his extensive experience includes projects across Florida, Louisiana, Texas, and California serving in multiple capacities including construction manager, project/grants manager, and QC manager.

Degree/Education/Certifications

- Construction Management, Louisiana State University
- Certificate of Infrastructure Disaster Management, TEEX
- National Grants Management Association Member
- Army Corps of Engineers CQM

Years of Experience

20 Years

Areas of Expertise

- HUD Regulations
- Construction Management
- Grants Management
- Quality Control

Relevant Experience

- **For Paradise, CA,** serving as a Grant Project Manager, Brandon assisted with the District's interactions with FEMA and Cal OES, facilitating smooth project formulation process. The nature of catastrophic damage paved the way for innovative applications of code upgrades, mitigation, and improved projects resulting in programs that will lead to a more resilient community. Projects currently total over $125M across PA, HMGP and Community Development Block Grant (CDBG) programs, and state grants.
- **For various Florida jurisdictions**, serving as Project Manager, Brandon provided monitoring and QA/QC closeout file review for Community Development Block Grant Disaster Recovery (CDBG-DR) funded projects. Brandon provided on-site monitoring for Hurricanes Hermine and Matthew CDBG-DR programs. Brandon provided closeout file review for the Florida Housing Rebuild and Rehabilitation Program, verifying all program policies were followed inc. eligibility, duplication of benefits, environmental review and construction.

- **For Baton Rouge, LA,** serving as Project Manager, Brandon worked on multiple projects including, Grant Management consultation for Victoria County, TX American Rescue Plan $17M allocation. Brandon provided federal procurement SOP's and process review, and program adherence per U.S. Treasury guidelines. Brandon supported the City of Clute as Grant Specialist assisting with writing Community Development Block Grant Mitigation Program grant project application and administrating the $9M grant awarded through the Texas General Land Office ensuring compliance with federal regulations. Brandon distributed daily reporting for Solution I team to Program Management. Ensured construction data was accurately captured in reports. Resolved discrepancies in client data and system of record. Responsible for resolving issues between the development team and inspection team.

3.8.29 Diederik Bissett, Engineering Staff

Diederik is a FEMA Public Assistance Subject Matter Expert with 15+ years of experience in disaster recovery, engineering, cost estimating, and hazard mitigation. He has contributed to more than $10 billion in successful Public Assistance funding across federally declared disasters, including Hurricanes Irma, Maria, Katrina, and Michael. He has held roles as Project Delivery Manager (PDMG), Cost Analyst, Structural Engineer, and Technical Site Inspector, and currently serves as an Emergency Manager with the U.S. Air Force.

Degree/Education/Certifications

- B.S., Engineering, University of Pretoria, Pretoria, GT
- Fundamentals of Structural Engineering – Cape Peninsula Institute of Technology, Cape Town, WC
- A.A.S., Air Force Institute of Technology, Dayton, OH
- Active Secret Clearance – DoD | Public Trust – DHS
- FEMA Certifications: 404, 406, 428, FAASt COA, CDBG-MIT, BCA
- GIS/ArcGIS/GeoExPT Specialist | RSMEANS & Xactimate

Years of Experience

15 Years

Areas of Expertise

- FEMA Public Assistance (PA) Programs
- Disaster Recovery & Mitigation (404/406/428)
- Infrastructure & Utility Recovery
- Grants Manager/Grants Portal Systems
- Cost Estimating & Compliance
- Hazard Mitigation & Engineering
- GIS/ArcGIS Analysis

Relevant Experience

- **For FEMA,** Diederik conducted inspections, developed scopes, and provided cost documentation. Diederik ensured compliance with FEMA PAPPG, mitigation policies, and procurement standards. Diederik supported FEMA Public Assistance programs for over 15 years, contributing to more than $10 billion in disaster recovery funding. Diederik served as PDMG, Cost Analyst, Structural Engineer, and Technical Site Inspector, ensuring compliance with FEMA PAPPG, 404/406 mitigation, and 428 alternate procedures. Diederik provided engineering assessments and cost estimates for large-scale infrastructure and utility restoration projects.
- **For the U.S. Air Force,** Diederik directed contingency engineering operations, infrastructure evaluations, and field planning. Diederik directed emergency management operations with the U.S. Air Force, leading contingency planning, infrastructure evaluations, and continuity of operations worldwide.

3.8.30 Lester Cutchall, Engineering Staff

Lester is a disaster recovery and construction professional with 34 years of experience in project inspection, construction management, and FEMA PA deployments. He has served as Program Delivery Manager, Task Force Lead, and consultant for federal recovery and mitigation programs.

Degree/Education/Certifications

- FEMA EMI Certifications: PA Program Delivery Manager,
- PA Site Inspector, BCA
- FEMA ICS 100, 200, 700, 800
- IS-1000 to IS-1018 Courses

Years of Experience

34 Years

Areas of Expertise

- Disaster Recovery & Mitigation
- Construction Project Management
- FEMA PA & HMGP Compliance
- Damage Assessments & Site Inspections
- Cost Estimating & QA/QC
- Risk Management & Recovery Planning

Relevant Experience

- **For Escalante Construction,** as a Consultant, Lester oversaw QA/QC inspections for construction projects up to $500M in value.
- **For Serco North America,** as Project Manager, Lester supported FEMA technical assistance.
- **As a Self-Employed Construction Consultant,** Nadia supported construction inspections and compliance. Lester consulted for federal, state, and local agencies on mitigation compliance.

3.8.31 Joel Rattler, Engineering Staff

Joel is a disaster recovery and construction management specialist with 15+ years of field experience leading large-scale recovery, environmental, and reconstruction projects across the U.S. He has supervised subcontractors on multimillion-dollar federal, commercial, and multifamily projects and provided inspections and technical documentation aligned with FEMA, OSHA, and IICRC standards. Skilled in fire, flood, and mold remediation as well as debris management, Joel has worked with FEMA, First Onsite, and multiple federal contractors to deliver compliance-driven results.

Degree/Education/Certifications

- OSHA 10 & OSHA 30 Certified
- IICRC Certified – Water, Fire, Mold Restoration
- LEED Certification
- Certified Project Manager

Years of Experience

15 Years

Areas of Expertise

- FEMA PA Program Support & Documentation
- Disaster Recovery & Reconstruction
- Fire, Flood, and Mold Remediation
- Substantial Damage & Site Assessments
- Environmental Sampling & Dewatering
- Subcontractor Oversight & Team Leadership
- Safety Compliance & QA/QC (OSHA/IICRC)

- Technical Reporting, RFIs & Documentation
- Project & Operations Management

Relevant Experience

- **For FEMA,** as a PA Inspector, Joel conducted site inspections of bridges, schools, and public facilities; produced audit-ready inspection packets with compliance data.
- **For First Onsite Property Restoration,** as an Assistant Project Manager, Joel directed subcontractors on mitigation, demolition, and reconstruction projects (casinos, banks, federal buildings); managed fire and water loss cleanup, mold remediation, and reinstallation, including Amazon Fire Loss response (2022).
- **For Currahee Properties,** Joel assisted with multifamily and school construction projects; coordinated subcontractors and site reporting.
- **For Southern Cat, Inc.,** Joel directed hurricane recovery teams; supervised reconstruction of retail and housing; managed mitigation and remediation, including Home Depot Fire Loss.

3.8.32 Abdel Bobby Ghany, Engineering Staff

Abdel is a seasoned restoration and disaster recovery professional with 20+ years of experience in field operations, logistics, insurance adjusting, and project supervision. He has managed large-scale restoration projects nationwide, supervised crews across multiple disaster events, and ensured compliance with OSHA, FEMA, and IICRC standards. He is proficient in water, fire, smoke, and mold remediation, and skilled in field inspections, estimating, and cost documentation.

Degree/Education/Certifications	Years of Experience
• Associate's, Management/Business Administration, Naparima College • IICRC Certifications: Water, Fire, Smoke, Odor, Mold Remediation, Mold Assessor • OSHA Safety Training • NFIP Certified Adjuster	20 Years

Areas of Expertise

- Restoration & Mitigation Operations
- Water, Fire, Mold Remediation
- Field Inspections & Cost Estimating (Xactimate)
- Team Supervision & QA/QC
- FEMA/OSHA Compliance
- Logistics & Warehousing Management

Relevant Experience

- **For BluSky Restoration Contractors, as National Supervisor,** Abdel is overseeing day-to-day operations across residential and commercial projects.
- **For Florida Fire and Flood Restoration,** as a Crew Chief Manager, Abdel is leading emergency responses, inspections, and IICRC-compliant remediation.
- **For VETCOR Restoration,** as Team Manager, Abdel is directing scheduling, profitability, and compliance.
- **For Rainbow International,** as a Water Restoration Technician Abdel is performing mitigation and remediation.

3.8.33 Jamilah Fraser, Communications Manager

Jamilah is a nationally recognized communications strategist with over 20 years of experience leading crisis communications, public engagement, and disaster response messaging for federal, state, and local agencies. She has directed Joint Information Centers (JICs), managed multilingual media operations, and delivered inclusive outreach for more than 30 federally declared disasters—including Hurricane Katrina, Hurricane Ike, the 2008 Midwest Floods, and the COVID-19 pandemic—ensuring compliance with federal accessibility standards and equitable engagement practices. Her work includes leading FEMA's inaugural BRIC campaign, designing outreach for the EPA Community Change Grant program, and supporting NOAA in strengthening flood risk communication. At Greene Street, Jamilah oversees contracts that integrate strategic communications, emergency management, and technical assistance, delivering Section 508-compliant, bilingual materials that promote program transparency, stakeholder engagement, and resilience in underserved communities.

Degree/Education/Certifications	Years of Experience
• B.S., University of South Carolina – Columbia	20 Years

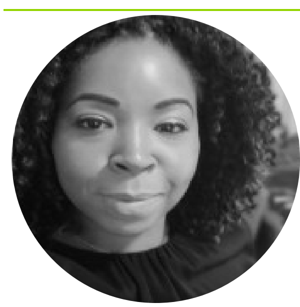
Areas of Expertise

- Crisis & Disaster Communications
- FEMA Public Information & External Affairs
- Environmental Equity & Public Health Communications
- Strategic Planning & Project Oversight
- Video Production & Art Direction
- Translation & Multilingual Outreach
- Community Engagement & Focus Groups
- Technical Assistance & Capacity Building
- Legislative & Policy Communications
- Media Operations & Relations

Relevant Experience

- **For the National Oceanic and Atmospheric Administration (NOAA),** Jamilah partnered with NOAA to evaluate and strengthen public communication of flood risk information. Jamilah developed messaging strategies and recommendations to improve community preparedness, coordination, and decision-making.
- **For the Virginia Department of Emergency Management,** Jamilah provided resilience-focused communications during statewide preparedness exercises and emergency operations. Jamilah developed inclusive messaging aligned with FEMA guidelines, ADA, and LEP standards.
- **For City of Alexandria – Office of Communications & Community Engagement,** Jamilah directed a citywide engagement campaign to build trust and collaboration among civic leaders and residents. Jamilah implemented outreach strategies that enhanced unity, transparency, and inclusion.

3.8.34 Shana Kemp, Communications Manager



Shana is a senior communications strategist with over 20 years of experience leading public affairs, crisis communications, and stakeholder engagement for federal, state, and local agencies, including missions for DHS, DOD, and the Department of the Navy. She has directed Emergency Operations Center (EOC) and Joint Information Center (JIC) communications during federally declared disasters and the COVID-19 pandemic, ensuring timely, accessible, and coordinated messaging that meets federal compliance and equity standards.
At Greene Street Communications, Shana leads strategic planning efforts that unite cross-sector partners to support preparedness, response, and recovery

initiatives. Her work includes leading outreach for the EPA Community Change Grant program, supporting NOAA flood risk messaging, and delivering resilience-focused communications for VDEM—demonstrating her capacity to manage Section 508-compliant, multilingual materials and inclusive engagement strategies that align with CDBG-DR program goals.

Degree/Education/Certifications	Years of Experience
• B.A., English, University of South Carolina	20 Years

Areas of Expertise

- Crisis & Disaster Communications
- Public Affairs & Strategic Messaging
- Stakeholder & Community Engagement
- FEMA-Compliant Public Information & JIC/EOC Operations
- Environmental Equity & Public Health Communications
- Technical Assistance & Capacity Building
- Executive Speechwriting & Briefings
- Digital Media & Multimedia Production
- Strategic Planning & Project Oversight
- Cross-Sector Partnership Development

Relevant Experience

- **For the U.S. Environmental Protection Agency,** Shana directed equity-centered communications and technical assistance to support community-driven environmental equity projects. Shana designed inclusive engagement strategies and outreach materials to strengthen resilience and increase public participation improve national flood risk messaging.
- **For the National Oceanic and Atmospheric Administration (NOAA),** Shana partnered with NOAA to evaluate and strengthen public communication of flood risk information. Shana developed messaging strategies and recommendations to improve community preparedness, coordination, and decision-making.
- **For City of Alexandria – Office of Communications & Community Engagement,** Shana directed a citywide engagement campaign to build trust and collaboration among civic leaders and residents. Shana implemented outreach strategies that enhanced unity, transparency, and inclusion.
- **For the Virginia Department of Emergency Management (VDEM),** Shana provided resilience-focused communications during statewide preparedness exercises and emergency operations. Shana developed inclusive messaging aligned with FEMA guidelines, ADA, and LEP standards.
- **For U.S. Department of Homeland Security / Department of Defense / Department of the Navy,** Shana supported national security and disaster operations through scalable, mission-ready communications. Shana coordinated stakeholder engagement, media operations, and strategic messaging during crisis events including the COVID-19 pandemic and federally declared disasters.

3.8.35 Tyler Cruz, Communications Staff

Tyler is a communications specialist with over a decade of experience translating technical research into clear, branded content for federal, state, and public audiences. He has supported communications across labor, health, safety, and crisis-response initiatives, with a strong understanding of public policy, compliance, and audience engagement. Tyler is skilled in developing Section 508-compliant infographics, fact sheets, slide decks, and visual toolkits that align with agency branding and strategic objectives. His expertise includes dissemination strategy, stakeholder outreach, and digital content creation for briefings, webinars, and campaigns focused on public health, trade, and labor policy.

Degree/Education/Certifications	Years of Experience

• B.S., Graphic Design, Art Institute of York	10 Years

Areas of Expertise

- Collaborative and Team Focused
- Community Centered, Socially Focused Design
- 508 Compliance
- Logo and Icon Design
- Adobe Creative Suite
- Stylized Graphics, Charts, Timelines, and Map Keys
- Template Designs: Web Structures, Presentations, Newsletters
- Branding Standards

Relevant Experience

- **For federal, state, and local initiatives**, Tyler leads the design and delivery of visual communications and public outreach. His work emphasizes accessibility, evidence translation, and engaging diverse audiences through targeted and dependable, well-branded, plain-language content.
- **For the Consumer Financial Protection Bureau (CFPB), National Oceanic and Atmospheric Administration (NOAA),** and multiple state and local education departments, Tyler designs accessible reports, infographics, and executive summaries that translate complex data into actionable content for public and policymaker audiences.
- **For Missouri Department of Health and Senior Services and Virginia Department of Health/Virginia Department of Emergency Management,** Tyler created and art directed digital, print, and out-of-home advertising campaigns for harm reduction and COVID-19 awareness. Met with community focus groups, doctoral subject matter experts and exemplar leaders to create fully diverse (community/cultural tone/reflection, color-blindness, ADHD and Autism, etc.), well-rounded campaigns.

3.8.36 Chelsea Carter, Communications Staff

Chelsea is a communications professional with a strong background in public relations, emergency management, and strategic outreach. She has developed and implemented communication plans across sectors, including health, environmental, and mental wellness, with expertise in social media strategy, content creation, and stakeholder engagement. Chelsea has led market research initiatives to inform messaging, managed crisis communications, and secured national media placements. Her skills include writing and editing for digital and print platforms, developing 508-compliant materials, and analyzing communication metrics to optimize impact.

Degree/Education/Certifications	Years of Experience
• M.A., Communications and Media Studies, Queens University of Charlotte • B.S., Journalism & Mass Communication	4 Years

Areas of Expertise

- Collaborative and Team Focused
- Social Media
- Microsoft Office
- Google Suite
- PR Software
- 508 Compliance

Relevant Experience

- **For the U.S. Department of Health and Human Services and the U.S. Environmental Protection Agency,** Chelsea assists in developing and implementing emergency management support plans, including training and preparedness programs. Conducts market research to identify trends and insights that inform communication strategies. She develops and manages social media campaigns to enhance client engagement and brand visibility. Additionally, Chelsea writes, edits, and obtains release/approval for articles, feature stories, news releases and statements, including electronic, web based, and hard copy material.

- **For a health and wellness company,** Chelsea developed strategic communication plans with clear messaging, managed all marketing activities including social media and SEO, and created persuasive content across platforms. She also conducted regular audits to ensure alignment with project goals.

3.8.37 Michael Wagenhauser, Training and Technical Assistance Manager

As a Managing Consultant with Guidehouse's Risk and Fraud Services team, Michael has conducted sensitive and complex specialized investigations involving violations of Emergency Relief funding programs, specifically Payroll Protection Program and Emergency Rental Assistance Programs. Michael has also assisted in conducting investigations involving funds for the New York City's Department of Education, the Department of Health and Human Services Head Start Program, the State of Washington's Broadband Equity Access and Deployment Program, and the Department of the Treasury's Office of Civil Rights and Equal Opportunity. Prior to joining Guidehouse, Michael spent over 24 years with the U.S. Department of Housing and Urban Development (HUD), Office of the Inspector General (OIG). As a Special Agent, Michael gained an expert understanding of HUD Programs, financial instruments, criminal and civil laws, fraud risks, and internal control design.

Degree/Education/Certifications	Years of Experience
• B.S., Seton Hall University • Certified Anti-Money Laundering Specialist (CAMS)	24 Years

Areas of Expertise

- Financial Fraud Investigations
- Grant Compliance Oversight
- HUD Program Enforcement
- Risk and Controls Review
- AML and SAR Reporting

Relevant Experience

- **For the U.S. Department of Housing and Urban Development Office of the Inspector General, prior to his consulting experience,** Michael served as a Special Agent with HUD OIG where he conducted a wide variety of complex civil and criminal investigations of public agencies and officials, public housing authorities, lending institutions, and various criminal enterprises. Matters included bank fraud, loan fraud, money laundering, wire/mail fraud, embezzlement, contract, and procurement fraud, bid rigging, corruption, and identity theft. Beginning in 1997, Michael navigated successful criminal, civil and employee investigations related to HUD programs for violations of federal and state law. Duties included the gathering and analysis of financial records, creation of written reports and testifying in court. Conducted hundreds of subject and witness interviews. Regional subject matter expert for HUD Public Housing Programs. Worked closely with housing authorities to improve their application procedures and to remove tenants for violations, including registered sex offenders, fugitives and failing to report income. Led numerous successful investigations of Public Housing and Multifamily employees for embezzlement. Experienced in conducting Community Development Block Grant reviews. Regional subject matter expert for FHA Single Family Mortgage Program. Conducted several of the nation's most impactful mortgage fraud cases involving developers, lenders, inspectors, realtors, and settlement attorneys. Experienced in review and analysis of Currency Transaction Reports and Suspicious Activity Reports, appointed regional representative to the Financial Crimes Enforcement Network. Led investigations involving sensitive internal employee matters and those with Congressional interest.
- **For the Small Business Administration's Payroll Protection Program,** Michael conducted

analysis of loan files to assess loan eligibility against specific criteria. Michael analyzed available information, recognized fraud indicators, conducted due diligence utilizing a variety of publicly available resources, and documented conclusions in an accurate, succinct, and cohesive narrative, supported with documentation of the facts presented. Michael identified millions of dollars in fraudulent loans and has authored extensive reports detailing the findings.

- **For New York State's Emergency Rental Assistance Program,** Michael performed Quality Control on a rental assistance project. While on this project, Michael created the content and provided multiple training opportunities involving the detailed explanation of HUD programs and the types of rental assistance that are available. Michael has also provided a weekly "Open House" to answer questions and or aid Guidehouse employees who had questions related to applications with HUD funding.
- **For the U.S Department of the Treasury's Office of Civil Rights and Equal Opportunity,** Michael conducted an investigation into the aspects of a Civil Rights Complaint involving the reported unequal disbursement of American Recovery Plan Act's State Local Fiscal Recovery Fund program (ARPA) funds to a predominately minority county that had experienced recurring flooding. Investigation included research of relevant statutes, ARPA requirements, review of county minutes, detail outline of where funding went, as well as the genesis of the flooding issues.
- **For the Washington State Broadband Office Broadband, Equity, Access, and Deployment (BEAD) Grant Program,** Michael conducted reviews of applicants focusing on their financial capability to meet standards for the project. Michael review included the use of open source and public records to validate provided information, research on provided Letter of Intent or Bonds, and a review of the sustainability and completeness of Business Plans.
- **For the New York City Department of Education Engagement (NYCDOE),** Michael analyzed NYCDOE records and orders to determine whether students have been provided with all of the items required on Individualized Education Program (IEP) in the required amount of time.

3.8.38 Curtis Brown, Training and Technical Assistance Manager

Curtis is a nationally recognized emergency management executive with over 20 years of leadership experience across federal, state, and local levels, including service as Virginia's State Coordinator of Emergency Management and Deputy Secretary of Public Safety and Homeland Security. He has led responses to more than 40 disasters—including federally declared events and the COVID-19 pandemic—delivering coordinated outcomes in housing recovery, infrastructure restoration, and FEMA Public Assistance (Categories A–G, Z), with a strong focus on equitable resilience, interagency coordination, and compliance with federal grant requirements. Curtis is a Certified Emergency Manager, Certified Continuity Manager, and Certified Professional Emergency Manager, and a graduate of FEMA's Emergency Management Executive Academy. He has advised national leaders, testified before Congress, and currently serves as a senior instructor at Virginia Commonwealth University and the University of Southern California, supporting capacity building and technical assistance aligned with HUD and CDBG-DR program goals.

Degree/Education/Certifications	Years of Experience
• M.A., Homeland Security and Emergency Preparedness, Virginia Commonwealth University • M.P.A., Virginia Tech • B.S., Political Science, Radford University • Certified Emergency Manager (CEM) • Certified Continuity Manager (CCM) • Certified Professional Emergency Manager (CPEM)	20 Years

Areas of Expertise

- Disaster Response & Recovery Operations
- FEMA Public Assistance (Categories A–G, Z)
- Homeland Security & Public Safety Policy
- Organizational Transformation & Strategic Planning
- Equity-Driven Resilience & Risk Planning
- Infrastructure Restoration & Emergency Funding
- Federal, State & Local Interagency Coordination
- Executive Leadership & Instruction/Training

Relevant Experience

- **For Black Wall Street Asheville (BWS-AVL),** Curtis supports the development of resilience and recovery strategies under CDBG-DR funding. Curtis also advises on community engagement, equitable economic recovery, and HUD-compliant program design.
- **For the Virginia Department of Emergency Management,** as a Director, Curtis directed statewide emergency management operations, including response to Hurricanes Matthew, Florence, and Michael. Curtis oversaw Virginia's COVID-19 emergency response with federal, state, and local partners. Curtis implemented agency reorganization, enhancing customer service, financial management, and disaster readiness.
- **For various clients,** Curtis provided strategic guidance on inclusive communications and engagement strategies during the COVID-19 pandemic. Curtis supported local and national partners in developing equity-centered approaches for public health messaging, resilience planning, and community recovery.

3.8.39 Cherrise Wilks, Training and Technical Assistance Staff

Cherrise is an award-winning recovery finance expert with 15+ years of experience in federal grants management, fiscal oversight, and disaster recovery. She has managed $133M+ in recovery and mitigation projects across FEMA PA, HMGP, and CDBG-DR/MIT programs. She is the founder of Affinity Consulting Group and an adjunct lecturer, and collaborates with Greene Street to support financial compliance and audit readiness for disaster recovery.

Degree/Education/Certifications

- M.P.A., University of North Florida, Jacksonville, FL
- B.S., Family, Child & Consumer Sciences, Florida State University
- A.A., Florida State University (2001)
- Grants Professional Credential (GPC)
- Florida Certified Contract Manager
- FEMA IS-100, 200, 300, 700, 703, 800

Years of Experience

15 Years

Areas of Expertise

- Disaster Finance & Grants Management
- FEMA PA & HMGP
- CDBG-DR/MIT Administration
- Infrastructure Finance & Recovery
- Cost Documentation & Compliance
- Interagency Coordination & ICS Finance

Relevant Experience

- **For FEMA,** Cherrise directed finance operations during major declarations. Cherrise trained local governments on FEMA systems and funding compliance.
- **For the Affinity Consulting Group,** as CEO, Cherrise provided TA to cities and counties on grants reporting, cost tracking, and audit readiness.

3.8.40 Halima Anderson, Training and Technical Assistance Staff

Halima is an accomplished emergency management professional with expertise in disaster recovery operations, substantial damage assessments, debris monitoring, and case management. She has supported FEMA and county-level recovery operations in Florida, providing technical and administrative support for high-pressure deployments. Halima is skilled in GIS software, data analysis, and stakeholder engagement, with a proven ability to develop training resources, streamline reporting systems, and sustain operational effectiveness during disaster recovery missions. Her background includes international client services delivery and workforce reintegration coaching.

Degree/Education/Certifications	Years of Experience
• B.A., Broadcasting, Telecommunications & Mass Media, Temple University • FEMA & Emergency Management Training: o IS-5.a, IS-100.c, IS-200.c, IS-700.b, IS-800.d, IS-2200, IS-230.	10 Years

Areas of Expertise

- Emergency Management & Disaster Recovery
- Substantial Damage Assessments (SDE)
- Debris Monitoring & FEMA Compliance
- GIS Software & Data Analysis
- Case Management & Community Outreach
- Training & Process Improvement
- Stakeholder Engagement

Relevant Experience

- **For AC Disaster Consulting,** as a SDE Analyst, Halima analyzed property data using Accela, SDE 3.0, FEMA NFHL Viewer, and appraiser tools. Halima created reporting system, authored reference guide, and led peer training. Halima supported 20-member team during 66-hour weeks in high-pressure deployment.
- **For Omni Strategies,** as a Disaster Relief Specialist, Halima assisted FEMA agents and survivors at DRCs; provided mitigation and loan support. Halima delivered outreach and logistics at MRCs during 84-hour weeks.
- **For Tetra Tech,** Halima ensured FEMA compliance; tracked debris, issued weigh-in tickets, verified debris categorization. Halima utilized GIS and ROW systems.

3.8.41 Rob Myers III, CDBG-DR Environmental Specialist

Rob is a Senior Environmental Specialist with 18 years of experience in environmental assessments, permitting, and regulatory compliance, specializing in NEPA documentation for HUD-funded disaster recovery projects. His background includes managing CDBG and HOME program compliance, where he conducts site-specific environmental reviews, public notices, and regulatory coordination. For the Hurricane Harvey Disaster Recovery Program in Texas, he developed environmental checklists and NEPA documentation for over 100 properties, ensuring eligibility for federal funding. He managed HUD Voluntary Home Buyout assessments in Panama City, Florida, supporting flood recovery efforts by completing environmental assessments for properties targeted for buyouts.

Degree/Education/Certifications	Years of Experience
• B.S., Biology, University of Texas at Austin	12 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit

- Project management
- CDBG program management

Relevant Experience

- **For Collier County, Florida,** Rob and team conduct Site Specific Environmental Reviews and prepare appropriate NEPA documentation. Rob begins by screening projects and determining the appropriate Classes of Action and level of required documentation. Rob then collects the necessary data through both desktop and field evaluations and develops the associated NEPA checklists, maps and supporting documentation to demonstrate compliance with HUD requirements. Rob identifies if the eight- or five-step processes are required and prepares necessary documentation for public notice. Rob also develops correspondence and documentation for regulatory agencies.
- **City of Panama City, Panama City, Florida**, Rob holds an ongoing contract to conduct Environmental Assessments and Tiered Environmental Reviews and prepares the appropriate NEPA documentation to satisfy HUD requirements under the Environmental Review Procedures' 24 CFR Part 58. Under its first Task Work Order, Rob is providing documentation for 35 houses in Panama City that will be purchased as part of the Buyback Program because of repeated flooding. This requires inspections of each house and completion of an Environmental Assessment.
- **Texas General Land Office**, Rob oversees the production of Site-Specific Checklists and Categorical Exclusion Type I's that are required to release federal funds for repairing storm-damaged houses. This program stems from U.S. Housing and Urban Development Block Grants related to Hurricane Harvey. Rob created a custom GIS tool and has produced the required GIS maps, data, and NEPA documentation for over 100 applicant properties.

3.8.42 Matthew Paek, Environmental Specialist

Matthew is an Environmental Scientist with specialized experience supporting federally funded disaster recovery programs, including CDBG-DR housing initiatives, HUD voluntary buyout programs, and NEPA environmental compliance. With a background in natural resource management, Matthew contributes technical expertise to environmental reviews, permitting support, and field inspections that ensure projects meet complex regulatory requirements under 24 CFR Part 58. He has played a key role in completing over 1,500 Tier II Site-Specific Environmental Reviews for Hurricane Harvey housing recovery efforts administered by the Texas General Land Office, as well as site assessments and documentation for repetitive loss buyouts in Panama City, Florida. His work emphasizes clear, defensible environmental documentation and streamlined regulatory coordination, helping jurisdictions advance recovery projects in compliance with HUD and FEMA standards.

Degree/Education/Certifications

- M.S., Natural Resources, Auburn University
- B.S., Natural Resources, Auburn University
- FDEP Qualified Stormwater Management Inspector

Years of Experience

2 Years

Areas of Expertise

- Geographic Information Systems (GIS)
- Plant Identification

Relevant Experience

- **For the City of Panama City,** as an Environmental Scientist, Matthew and team conducts Environmental Assessments and Tiered Environmental Reviews and prepares the appropriate NEPA documentation to satisfy US Department of Housing and Urban Development (HUD) requirements under the Environmental Review Procedures' 24 CFR Part 58. Under their first Task Work Order, the Team is providing documentation for 35 houses in Panama City that will be purchased as part of the Buyback Program because of repeated flooding. This requires inspections of each house and completion of an Environmental Assessment.
- **For the Texas General Land Office**, Matthew and team has completed over 1,500 Tier 2 Site

Specific Environmental Evaluations to gain NEPA clearances for Hurricane Harvey housing assistance applications. Upon receipt of a Task Work Order, application sites are screened to ensure they are covered by previous county-wide broad reviews and qualify for the program under one of several proposed actions. The team then coordinates the historic and archaeological reviews to determine what known resources are present. This effort includes a historian reviewing the National Register of Historic Places and databases from the Texas Historical Commission, as well as direct coordination with the State Historic Preservation Officer. Depending on site conditions such as presence of asbestos or interior mold, the team uses field inspection forms to evaluate necessary project commitments and documentation needs. Metric then produces an evaluation packet that contains a checklist covering the social, cultural, natural, and physical environments, supported by maps and tables of data. Those maps are key to showing historic resources, flood zones, wetlands, coastal zone boundaries, endangered species habitats, contamination, and airports, and can easily demonstrate when a project is outside regulatory buffers or boundaries.

- **For FDOT District 1**, Matthew and team involves the evaluation of multiple potential corridors for a multi-use path and possibly a vehicle bridge over Interstate 4 near the City of Lakeland. The bridge would connect residential areas with a school and link communities separated by the interstate. Matthew assisted with GIS analysis and mapping as well as research and documentation of existing conditions.

3.8.43 Verónica Olivera Vélez, Civil Rights Specialist

Veronica is a bilingual lawyer and compliance specialist with a strong foundation in regulatory frameworks, grant administration, and community development. She has supported federal and state programs focused on disaster recovery, environmental justice, and equitable resource distribution—ensuring compliance with complex regulations and promoting transparency across diverse communities. Verónica has led technical assistance efforts, guided applicants through federal funding processes, and managed teams to uphold civil rights standards in program delivery. Her legal background and experience in nonprofit and government sectors reflect a deep commitment to equity and public service. A recipient of the Women's Alliance EmpowHer award, Verónica thrives in collaborative environments that value cultural diversity and social impact.

Degree/Education/Certifications	Years of Experience
• J.D., University of Puerto Rico • B.A., Comparative Literature & Political Science, University of Puerto Rico	6 Years

Areas of Expertise

- Regulatory Frameworks
- Cross-cultural Understanding
- Communications
- Feasibility Analysis

Relevant Experience

- **For Puerto Rico,** Veronica managed Community Development Block Grant - Disaster Recovery (CDBG-DR) funds, ensuring compliance with 2 CFR 200 guidelines. Oversaw the allocation of federal disaster recovery funds, ensuring projects meet governmental standards, and maintained strict adherence to regulations on financial management, procurement, and reporting. Ensured that all funds are used effectively to support rebuilding efforts, while adhering to federal guidelines to ensure transparency and accountability throughout the process.
- **For Part of the Community Change Grant (CCG) program offered by the Environmental Protective Agency (EPA) in the USA,** Veronica provided support to communities by ensuring compliance with 2 CFR 200 guidelines. Guided applicants through the grant process, helping them meet federal standards for project design, financial management, and reporting. This role involved offering tailored assistance, ensuring proper use of CCG funds, and maintaining transparency and accountability throughout the application process to support community-driven projects.

3.8.44 Jarred McCormick, Civil Rights Specialist

Jarred is a public sector professional with experience in grant administration, compliance monitoring, and community development. He has supported multiple public assistance programs, contributed to civil rights research, and presented data insights to diverse audiences. His background includes administrative and land management roles, reflecting a consistent commitment to equity, regulatory adherence, and public service.

Degree/Education/Certifications	Years of Experience
• M.P.A., University of Illinois Springfield	12 Years

Areas of Expertise

- Regulatory Compliance
- MS Office Suite
- Reporting
- Schedule Management

Relevant Experience

- **For the City of Peoria, IL,** Jarred secured and administered federal and state housing and community development grants—including HUD Choice Neighborhoods Planning, IL Homeowner Assistance Fund Home Repair, and IHDA Strong Communities—while conducting historic preservation environmental reviews, GIS mapping, and payment requisitions in alignment with civil rights and fair housing compliance standards.
- **For Illinois Department of Commerce and Economic Opportunity, Office of Community Assistance,** Jarred supported administration and compliance monitoring of five public assistance programs—including CSBG, LIHEAP, IHWAP, LIHWAP, and CARES Act funding—by conducting Equal Opportunity Employment Act research, analyzing demographic data, tracking grantee performance, and presenting expenditure findings at statewide conferences.

3.8.45 Kelli Pavelko, CDBG-DR Program Analyst III

Kelli is a Managing Consultant in Guidehouse's Risk and Fraud Services practice. She has over 13 years of experience in the financial sector, specializing in fraud analysis, investigations, transactional analysis, operational management, risk management, and loan accounting. Kelli has worked in both the public and private sectors, including government agencies, financial institutions, and fintech companies.

Degree/Education/Certifications	Years of Experience
• B.A., Strayer University • Certified Fraud Examiner (CFE)	13 Years

Areas of Expertise

- Fraud Prevention Strategy
- Compliance Controls Implementation
- Data-driven Fraud Detection
- Grant Risk Management
- Policy and Procedure Development
- Financial Compliance Oversight
- Risk and Controls Assessment

Relevant Experience

- **For a government-sponsored loan program,** Kelli focused on fraud investigations related to both loan originations and forgiveness. Her work involved analyzing available information and documents, examining metadata, identifying indicators and trends of fraud, conducting due diligence, and utilizing TLO and publicly available resources. Kelli then documented her findings in a clear and cohesive written narrative. Kelli also drafted and performed quality assurance (QA) reviews of Suspicious Activity Reports (SARs) based on the suspicious activity and facts presented in the financial crime investigation that would be filed with FinCEN while meeting SLAs and regulatory expectations. Kelli also assisted with the development and implementation of the clients' Fraud Forgiveness SOP while improving the client processes and identifying items for improvement.

- **For the State of New York Office of Temporary and Disability Assistance,** Kelli served as a Fraud Team Lead with duties and responsibilities that included leading a team of more than 10+ investigators in reviewing applications that exhibit potential indicia of fraud and producing various deliverables for the client. Kelli was also responsible for developing policies and procedures governing the application review process, project management, providing internal and external training sessions, and implementing a system integration to monitor and track the application review process.
- **For a Financial Institution, Global Financial Crimes Compliance Program,** Kelli evaluated the GFCC policies and procedures, as well as conducting stakeholder interviews and system walkthroughs. The focus of her work was on assessing the corporation's testing and assurance processes, as well as its transaction monitoring programs.
- **For a State National Electric Vehicle Infrastructure Program,** Kelli was responsible for the review of selected applications for potential indicia of fraud and coordinated with the Eligibility Review Team to incorporate fraud-related controls and risk management throughout the execution of the program. Kelli assisted with the development of procedures that govern the application review process and expense reimbursement process for potential indicia of fraud.
- **For a State Broadband for Economic Development (BEAD) Program,** Kelli was responsible for reviewing subgrantee applications for the Financial Capability section of the program to identify risk factors, thereby safeguarding grant disbursements.
- **For a Financial Institution, Financial Crimes Compliance Program,** Kelli assisted with the facilitation and implementation of a standardized risk and control assessment to identify and evaluate functional risks across relevant business processes. Kelli collaborated with stakeholders to ensure appropriate controls are in place to mitigate risk at an acceptable level.

3.8.46 Portia Egan, CDBG-DR Program Analyst III

Portia has 10+ years' public and nonprofit experience supporting affordable housing and community and economic development through analysis, planning, policy development, and program implementation. Prior to joining Guidehouse, Portia was a Program Manager for the City of Philadelphia's Division of Housing and Community Development. In this role she worked on housing policy and program development alongside City leadership and partner agencies – most recently, Philadelphia's nationally acclaimed Eviction Diversion Program. She executed the preparation of major federal funding applications and agency reports, including HUD Consolidated and Annual Action Plans.

Degree/Education/Certifications	Years of Experience
• M.P.A., Concentration in Economic Development, Indiana University • B.A., Psychology, Minor in Philosophy, DePauw University • HOME Compliance Specialist, National Center for Housing Management	10 Years

Areas of Expertise

- Grants management
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Research, data analysis, and evaluation
- Housing policy and programs
- Program and project management
- Knowledge of new housing construction and all related regulatory compliance, including building

codes

Relevant Experience

- **For Franklin County, Ohio's Department of Economic Development and Planning,** Portia led efforts to resolve Franklin County's HUD HOME monitoring findings by developing a subrecipient monitoring policy, establishing risk assessment criteria, and creating detailed monitoring tools to enhance compliance and oversight. Developed an internal controls policy to strengthen the county's financial management and adhere to federal regulations. Portia advised on CDBG eligibility for development projects and created a standard process for documenting CDBG project eligibility to help the county effectively and efficiently assess proposed projects. Portia updated Franklin County's Citizen Participation Plan to align with HUD requirements and strengthen community engagement and transparency in the planning process. Portia created a Consolidated Plan Playbook to guide the county's strategic planning and successfully execute HUD programs, including clear steps and leading practices for staff and leadership to facilitate execution of the County's Consolidated Plan, Annual Action Plan, CAPER, and related required engagement.
- **For Baltimore County's Department of Housing and Community Development,** Portia conducted current state and future state assessments of the county's Housing Finance Program. She generated key insights from stakeholder interviews, documentation reviews, desk research, and peer studies and then leveraged these insights to develop a series of strategic and actionable recommendations to guide the future of the program. These recommendations, once implemented, will work to improve DHCD operations and grow the impact of the program in alignment with the County's priorities and goals. Portia conducted in-depth research of innovative financing tools and leveraged insights from stakeholder interviews, peer counties, and financial experts to identify recommended improvements to the County's housing financing strategy, including its use of federal grant funds (e.g., ARPA, HOME, and CDBG funds) and financing incentives (e.g., payments in lieu of taxes (PILOTs). Portia assisted the County in developing its application for HUD's Pathways to Removing Obstacles to Housing ("PRO Housing") grant program, providing subject matter expertise, key narratives, analysis, and mapping support. If awarded, this grant would provide the County with $10M to fund key housing initiatives and help it meet its Voluntary Compliance Agreement (VCA) goals.
- **For the City of Chicago, Office of Budget and Management,** Portia developed recommendations for the city of Chicago's Office of Budget and Management on sustaining American Rescue Plan Act (ARPA) programs and adapting the city's 5-Year Consolidated Plan and Annual Action Plan portfolio to evolving needs and priorities. Portia provided strategic guidance on stakeholder engagement, establishing a strategic budget framework, exploring alternative funding opportunities, enhancing program evaluation to drive budget decisions, and aligning and streamlining programs to create efficiencies and strengthen services. Portia conducted a program survey across city departments to assess fiscal sustainability and program impact to inform budget and programmatic decisions.

3.8.47 Nadia Brual, CDBG- DR Program Analyst II

Nadia is an innovative leader and manager with 15+ years of leadership experience spanning disaster recovery, construction, nonprofit, and education management. She is a Certified Nonprofit Professional with a certificate in Equity and Inclusion and a proven track record of delivering compliance, monitoring, and project oversight for multimillion-dollar programs. Nadia brings a data-driven approach to decision-making, ensuring efficiency, structure, and accountability in disaster recovery and resilience projects.

Degree/Education/Certifications	Years of Experience
• M.S., Nonprofit Administration, Louisiana State University • B.S., Biology, Austin Peay State University • Construction Manager-in-Training (CMIT)	15 Years

- Certified Nonprofit Professional (CNP)
- Member, Project Management Institute (PMI)

Areas of Expertise

- Disaster Recovery Program Management
- CDBG / CDBG-DR Compliance
- Construction & Infrastructure Oversight
- Grant Compliance & Monitoring
- Nonprofit & Community Leadership
- Diversity, Equity & Inclusion

Relevant Experience

- **For the NC Office of Recovery & Resiliency,** as the Managing Principal, Nadia directed compliance, monitoring, and grant management for housing recovery under HUD CDBG-DR.
- **For New York Department of Design & Construction (NYDDC),** as Project Manager, Nadia managed rehabilitation and renovation project valued at $230M. Nadia oversaw design, construction phases, and stakeholder engagement.
- **For Lafayette Parish Schools,** Nadia directed Davis-Bacon compliance and reporting for federally funded school recovery projects.

3.8.48 Samuel Hitchcock, CDBG-DR Program Analyst II

Samuel is a CDBG-DR expert with extensive experience in housing and economic development program design, implementation, and compliance. He has successfully managed CDBG-DR-funded projects that support long-term disaster recovery, ensuring alignment with HUD, FEMA, SBA, and USDA regulations to maximize funding impact. As a project manager and staff leader, he excels in timeline management, stakeholder engagement, and strategic program execution, fostering collaborative partnerships to drive recovery efforts.

Degree/Education/Certifications	Years of Experience
• M.A., Global Leadership & Sustainable Development, Hawaii Pacific University • B.S., Environmental Studies, University of Montana	12 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Project management

Relevant Experience

- **For Multiple Government Clients,** Samuel managed and designed CDBG-DR Housing, Agriculture, and Economic Development programs for state and territorial government agencies, verifying HUD compliance and efficient fund distribution. He developed programmatic guidelines, built equitable program processes, and streamlined IT systems for grants management to improve transparency and oversight. Samuel led subrecipient agreements, outreach, intake, and post-award monitoring, while serving as a key liaison between federal agencies, insurance providers, and program teams to drive cross-functional solutions.
- **For the New Mexico Legal Aid,** Samuel managed the day-to-day operations of a large disaster legal services program, overseeing civil legal services, community outreach, grant development, and compliance. He coordinated public-facing activities, stakeholder engagement, and disaster recovery efforts to facilitate accurate grant delivery and alignment with federal, state, and local regulations.

3.8.49 Emily Pinell, CDBG-DR Program Analyst I

Emily is a dedicated and skilled professional with extensive experience in HUD funded grant programs, including HOME-ARP. As a seasoned grant consultant, she conducts comprehensive needs assessments to identify and address community requirements. Emily has contributed to the successful composition of multiple grants and allocation plans. Her proficiency in data manipulation and creative data analysis sets her apart as an analytical, detail-oriented professional. With a proven track record, Emily excels in collecting, analyzing, and leveraging data to enhance solutions, demonstrating a consistent commitment to success.

Degree/Education/Certifications	Years of Experience
• B.S., Business Administration, Nicholls State University • IS-0230.e: Fundamentals of Emergency Management	8 Years

Areas of Expertise

- Force Account Labor
- Cose Estimating
- Project Worksheet Development
- Grant Management
- Data Analysis
- Closeout Reconciliation
- Grant Writing

Relevant Experience

- **For City of Nashua, NH,** Emily works closely with the City on a transformative HOME-ARP program aimed at addressing the housing needs of qualifying populations. Her role has involved collaborating on the program's initiation, where she helped define objectives, set key priorities, and establish a Strategic Program Implementation Plan.
- **For Pasco County, FL**, Emily conducted QA/QC reviews for FEMA PA reimbursement from Hurricane Ian. She reviews data for force account equipment with FEMA's schedule of current equipment rates, as well as 20% compliance reviews for all Force Account Labor summaries.
- **For Terrebonne Parish, LA**, Emily and team provided grant management and administrative services for HUD, FEMA, and other federally funded programs. This work also included providing program, grant, and project management for disaster recovery funding, planning advisory services, grant writing, reimbursement and closeout activities, compliance maintenance, and guidance for several government aid programs. Emily provided outreach services, identified unmet needs that fit program requirements, and developed projects that met policy guidelines.

3.8.50 Finn McCarthy, CDBG-DR Program Analyst I

Finn McCarthy is a consultant in State and Local Government Practice. Finn has demonstrated a level of experience in grants management, training and technical assistance, process improvement, and operational change management.

Degree/Education/Certifications	Years of Experience
• B.A., Political Science, Arizona State University • Lean Six Sigma Yellow Belt	2 Years

Areas of Expertise

- Grant compliance and monitoring
-

Relevant Experience

- **For Chicago, IL,** Finn is assisting the City's Office of Budget and Management in the administration of the City's CDBG-DR allocation. Finn contributed to the development and refinement of the City's Action Plan, designing project frameworks in alignment with HUD's Universal Notice and City priorities. Additionally, he has taken a leading role on the project design workstream, coordinating with team members to assess infrastructure and economic revitalization needs, drafting and reviewing compliance and financial management documentation, and reviewing stakeholder and public engagement through public comment analysis. Finn has also supported the team in governance planning and capacity-building efforts, including preliminary training design and technical assistance strategizing to ensure program compliance.
- **For Wayne County, MI,** Finn assisted several different workstreams of the County's Emergency Rental Assistance Program (ERAP). Finn conducted reviews of roughly 300 applications weekly, with responsibilities including cross checking with the Michigan State Housing Development Authority to prevent duplicate payments, verifying general eligibility as well as further eligibility reviews pertaining to rent and utility need. Finn helped to identify and freeze fraudulent applications to ensure the dispersal of the County's $32 million in funding was provided to eligible and legitimate renters.
- **For the City of Grand Rapids, MI,** Finn is providing support to the City's Fiscal Services team specifically identifying, organizing, and presenting federal funding opportunities on a monthly basis. In addition, Finn assists the engagement team in advancing the City's strategic plan and providing guidance regarding federal reporting and compliance requirements.
- **For Franklin County, OH,** Finn assisted the Community Development section of the Department of Economic Development & Planning in managing and reconciling the county's HUD entitlement grants, including reviews of records for CDBG and HOME awards. Additionally, he worked closely with the county's Financial Administrator and other county officials in the creation of internal programs for oversight and financial management. This included the creation of a subrecipient monitoring plan, stronger subrecipient agreements, and financial policies and procedures adhering to the requirements in 2 CFR Part 200.302.

3.8.51 Patricia Holland, CDBG-DR Compliance and Monitoring Analyst III

Patricia is a Subject Matter Expert in housing and compliance with of experience managing CDBG-DR, CARES, and ARPA programs. She has directed housing assistance initiatives, eligibility teams, and compliance reviews for multimillion-dollar recovery programs.

Degree/Education/Certifications	**Years of Experience**
• M.S., Management: Emergency Management, University of Maryland • B.S., Urban Planning & Disaster Policy, University of New Orleans • Historic Preservation Certificate, University of New Orleans • Teaching Certification – University of Mississippi	15 Years

Areas of Expertise

- HUD CDBG-DR & MIT Programs
- CARES/ARPA Compliance
- Housing Assistance Programs
- Eligibility & Audit Oversight
- Process Improvement & Policy Development
- Davis-Bacon & Section 3 Compliance

Relevant Experience

- **For PH Consulting,** as a Compliance and Finance SME, Patricia directed compliance and finance SME activities for ReBuild NC CDBG-MIT. Patricia developed SOPs and oversaw compliance monitoring. During Patricia's time, she directed recapture of $42M+ in ERAP funds.
- **For The Workforce Group,** as the Lead Eligibility Supervisor, Patricia led eligibility teams of 67 staff for FDEM Housing Programs.

3.8.52 Adia Preston, CDBG- DR Compliance and Monitoring Analyst III

Adia is a Senior Consultant with Guidehouse's Disaster Recovery and Resilience team, where she brings experience in disaster recovery, affordable housing, program and project management, and grants management. Adia specializes in collaborating with private and public agencies to develop and implement improved operational processes that comply with HUD's CDBG-DR and FEMA PA regulations and guidelines to facilitate successful program implementation.

Degree/Education/Certifications	Years of Experience
• B.S., Empire State University • IASSC Certified Lean Six Sigma Yellow Belt • Paralegal Studies Certification	12 Years

Areas of Expertise

- Grant compliance and monitoring
- Project management
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Stakeholder engagement

Relevant Experience

- **For Moss Cape/New York State Governor's Office of Storm Recovery**, as a Senior Project Manager, Adia managed and led a team of three staff members including an intake associate, and two junior project managers in the administration of New York State's Buyout & Acquisition Program throughout the full grant's life cycle of CDBG-DR funding (Pre-Award through Post-Award, Monitoring, and Closeout).
- **For Henry Ford Health**, as a Closeout Project Manager, Adia provides subject matter expertise to support FEMA PA grants for COVID-19 funding through project management experience to include cost eligibility, forecasting expenditures, PA closeout leading practices, project worksheet development and reconciliation, electronic payment processes, reporting, and compliance. She is knowledgeable of the Stafford Act and Code of Federal regulations (2 C.F.R. 200) funding uniform requirements. Adia is a FEMA PA Grant program SME with experience in disaster recovery across three national disasters. She has managed over $33M in grant awards from operations, grant compliance, and financial response.
- **For Neighborhood Restore HDFC**, as a Project Manager, Adia managed all timelines, financials, and logistic information for the New York City Department of Housing Preservation and Development Basement Apartment Conversion Pilot Program (BACPP) and the HomeFix Repair Program that aimed to provide legal conversion of basements/cellars, financial and technical assistance, and home repairs to over 5,000 eligible homeowners. She collaborated with NYC Department of Housing Preservation & Development and NYCHA, other city agencies, and private funding institutions to aid with completing scopes of work, financing options, rehabilitation plans, and construction loan closings. Adia conducted needs assessments on properties to solidify hard and soft costs from acquisition to rehabilitation to resell, as well as input data and run reports using

Salesforce to understand success rates. She reviewed requisitions monthly, coordinated and disseminated work schedules, approved timesheets for two rehabilitation specialists, and prepared check requests for roughly 15 third party consultants and vendors combined. Adia organized, managed, and attended construction site visits as well as worked cross-functionally with the marketing and outreach team, vendors, construction rehabilitation specialists, and superiors from acquisition to close on all projects to collect, organize, and relay information. Adia administered four city project budgets totaling $30M using Salesforce in collaboration with Deputy Director to manage funding for up to 500 gut renovations on single and multi-family homes within the five boroughs of New York City.

3.8.53 Brent Puckett, CDBG- DR Compliance and Monitoring Analyst III

Brent is an experienced professional with extensive expertise and education in construction techniques, code compliance, construction oversight, and CDBG-DR damage assessments. Since 2018, Brent has been working for the State of Louisiana's Office of Community Development, where he is a Program Manager for the Restore Louisiana Program. He is an expert in implementation and enforcement of program policy and procedures to deliver consistent, quality products. Brent is a creative problem solver who can rapidly adapt to a continuously evolving program.

Degree/Education/Certifications	Years of Experience
• B.S., Petroleum Engineering, Louisiana State University	12 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Ability to effectively identify and prevent duplication of benefit
- Proficient in the use of the HUD Disaster Recovery Grant Reporting System (DRGR)
- Project management
- Knowledge of new housing construction and all related regulatory compliance, including building codes

Relevant Experience

- **State of Louisiana, Office of Community Development**, Brent serves as Project Manager for the Restore Louisiana program's quality control team by aiding those affected by the historic 2016 floods, the 2020 hurricanes, and Hurricane Ida. The state of Louisiana has used its $4.3 billion CDBG-DR allocation through the Restore Louisiana program to aid 91,000 affected households. The Program repairs homes, and addresses safety issues such as lead-based paint, asbestos, and overall structural integrity. Brent's team conducts assessments that are cost-effective while meeting the green building standards and the municipality code requirements.
- **State of Louisiana, Office of Community Development**, Brent's role included improving the damage assessment process, as well as verifying that damage estimates met FEMA guidelines. His responsibilities included damage assessments, appeals, change orders, pre-con, and reconstruction estimates. Brent created weekly Field Monitoring reports and monitored damage assessor activity to document adherence to Standard Operating Procedures. Brent performed final inspections to determine the scope compmarcleted by the contractors and confirmed that the home was repaired or built to the municipality code requirements. Brent processed documentation to allow the funds to be disbursed to the contractor and created change orders to remove the incomplete scope from the estimate. Brent reviewed structural engineer reports to address any foundation issues and processed change orders to add the structural line items to the estimate. Brent performed sight inspections to verify the structural items were completed to the program's standards and reviewed flood elevation certificates to determine if the required elevation height met FEMA guidelines. Brent converted rehabilitation estimates to reconstruction estimates, based off

the condemnation or substantial damage letters and helped build reconstruction estimates based off the building blueprints in Xactimate.

3.8.54 Justin Cauley, CDBG- DR Compliance and Monitoring Analyst II

Justin has more than 11 years of disaster recovery experience, and he has supported disaster recovery projects in Florida, Colorado, South Carolina, Texas, New York, Ohio, Rhode Island, Kansas, and Puerto Rico. His responsibilities have included disaster case management, debris management, grant management, and compliance monitoring and implementation. He provided FEMA PA grant management services to Larimer County, Colorado, and was deployed to South Carolina following the February 2014 Severe Ice Storm. He also served as a Disaster Case Manager Supervisor and provided comprehensive mobility counseling and disaster case management services to eligible homeowners under the CDBG-DR Program within the Deep East Texas Council of Governments and in Liberty County, Texas.

Degree/Education/Certifications

- B.S., English, Troy State University
- IS-00001.a: Emergency Manager: An Orientation to the Position
- IS-00393.a: Introduction to Hazard Mitigation

Years of Experience

11 Years

Areas of Expertise

- CDBG-DR Policy
- Tenant Relocation, Acquisition, and Uniform Relocation Act (URA)
- Vendor Management
- Data Analysis
- Grant Management
- Debris Management
- Recovery Management

Relevant Experience

- **For the Texas General Land Office,** as a URA specialist, Justin provides insight and knowledge into this program and relocate affected tenants while also providing all required documentation to the City of Houston and the Texas General Land Office. Justin oversaw the final review of all final eligible and ineligible reviews while creating final QC packets to be reviewed by HUD for approval. With his assistance, the City of Houston was able to identify eligible and ineligible tenants and relocate almost all the eligible tenants that were affected by this buyout program and relocated to comparable dwellings. This project consisted of over 700 individual cases that required a thorough review of each and every one. This also included locater services to ensure contact was made and all necessary documentation was present within each file.
- **For the Puerto Rico Department of Housing**, Justin served as the lead subject matter expert and program manager for the implementation of the Uniform Relocation Act (URA) across the Puerto Rico Department of Housing (PRDOH) CDBG-DR portfolio of twenty-six programs. In this role, Mr. Cauley developed and updated the Grantee’s policies, procedures, and grant management system; prepared compliance reports; oversaw compliance reviews of all URA cases; and provided ongoing technical assistance and direction on federal grant requirement and regulations. Justin was responsible for ensuring URA compliance in matters involving tenant and business displacement and relocation, as well as acquisition of real property for CDBG-DR program totaling over $10 billion. He also provided the knowledge architecture and training to ensure vendors contracted by PRDOH were able to implement their flagship housing program; a $3 billion program providing repair, reconstruction, and relocation to impacted homeowners following Hurricanes Irma and Maria.
- **For the Governor’s Office of Storm Recovery**, **NY**, Justin served as case management lead and was responsible for overseeing a team tasked with management of more than 1,400 applications to the Small Rental Properties Program, the Affordable Rental Program, and the Interim Mortgage

Assistance Program funded by HUD CDBG-DR funds appropriated by the Disaster Relief Appropriations Act. In this position, he facilitated intake of applications in accordance with established protocols for handling sensitive information, provided technical assistance on topics including program eligibility, funding requirements, and interim mortgage assistance for temporarily displaced homeowners, drafted and implemented policies for QA/QC of applicant case files, and led efforts to conduct duplication of benefits reviews for over 1,400 applicant case files. He also conducted weekly performance and production reviews with program staff and championed the implementation of New York's Interim Mortgage Assistance Program, where he provided compliance expertise and process development.

3.8.55 Victor Benito, CDBG-DR Compliance and Monitoring Analyst II

Victor is a senior consultant serving as a disaster recovery specialist in the Capital Projects and Infrastructure practice. He designs and implements innovative solutions that enhance efficiency and service quality across programs, improving coordination between key participants, addressing regulatory requirements, and optimizing the day-to-day operations of program workstreams. A professional in disaster recovery and response, Victor supports clients through disaster preparedness planning, risk assessment and management, regulatory compliance and reporting, community training and development, post-event evaluation, and impact measurement. He has authored several articles on disaster recovery management in the Cornell Policy Review and served as an Education Volunteer for the U.S. Peace Corps in China.

Degree/Education/Certifications	Years of Experience
• M.P.A., Science, Technology, and Infrastructure Policy, Cornell University • B.S., Media, Culture, and Communications with concentrations in Global & Transcultural Communications and Interaction & Social Processes, New York University	10 Years

Areas of Expertise

- Grant compliance and monitoring
- Quality assurance, monitoring, reporting, technical assistance, and overall compliance with HUD regulations
- Disaster recovery and mitigation
- Ability to effectively identify and prevent duplication of benefit
- Emergency management
- Project management

Relevant Experience

- **For the State of South Carolina Department of Commerce**, Victor facilitated the disbursement of over $38M in CBDG-CV funds for Public Services and Public Facilities Improvements across counties in response to coronavirus impacts. He reviewed drawdowns from Councils of Governments for required documentation and revisions against the Department of Housing and Urban Development's guidelines and local policies for quality assurance. He compiled 28 project closeout packages for the Department of Commerce in compliance with HUD guidelines.
- **For the Missouri Department of Economic Development's Community Development Block Grant – Disaster Recovery and Mitigation Policy Revision and Training**, Victor analyzed and evaluated federal and state Community Development Block Grant - Disaster Recovery and - Mitigation policies and procedures for the Department of Economic Development. Victor provided three trainings to 10 DED staff and 15 CDBG program subrecipients on the written policies. Victor wrote and delivered five CDBG policy documents to be included in DED's CDBG Administration Manual: Affordable Multifamily Rental Recovery, General Infrastructure – Mitigation, Infrastructure in Support of Housing, and Homeowner Rehabilitation and Reconstruction.
- **For the New York State Office of Temporary and Disability Assistance's Emergency Rental Assistance Program**, Victor facilitated the disbursement of Emergency Rental Assistance

Payments to landlords and property management organizations to provide significant economic relief to help low- and moderate-income households at risk of experiencing homelessness or housing instability by providing rental arrears, temporary rental assistance and utility arrears assistance. He oversaw Tier II, High Touch, and Communications workstreams and led the development of streamlined processes to improve efficiency in case review and service request resolution. He led the effort to process over 3,000+ Service Request Tickets, 100+ High Touch and Reasonable Accommodation cases, and the communications associated with each case. He reduced the backlog of 1,000+ Service Request Tickets to zero through new workflow implementation.

- **For the Lehigh Valley Health Network's FEMA Public Assistance Audit Reconciliation**, Victor validated details from contracts, invoices, payment logs, purchase orders, and procurement documentation to verify $10M in FEMA Public Assistance funds provided to Lehigh Valley Health Network. He reviewed financial records, reimbursement claims, and supported documentation to verify compliance with federal guidelines. He identified document discrepancies, validated expenditures, and provided recommendations for corrective actions to mitigate risks and facilitate proper FEMA PA fund utilization.
- **For the New York State Department of Homeland Security and Emergency Service**, Victor co-authored an after-action review of New York State's response to the historic blizzard that occurred from December 22-26, 2022 in Buffalo, New York. The assessment required extensive review of over 1,300 pages of documentation, over 50 interviews with stakeholders representing offices from city middle-management to mayors and state commissioners, and the production of a 49-page report that was released to the public and whose recommendations were used to create change at the state and local level for future winter weather emergencies. Victor analyzed the public communications (press releases, tweets, Facebook posts, emergency alerts, press conferences, and television interviews) sent by New York State agencies during the Buffalo Blizzard of '22. Agencies included Division of Homeland Security and Emergency Services (DHSES), the Governor's Office, New York State Department of Transportation (NYSDOT), and New York Department of Transportation (NYDOT). Agency communications were analyzed using FEMA's framework for effective warning messages. Conducted interviews with New York State, Erie County, and City of Buffalo staff across various agencies included in emergency support functions, to gather insights on the emergency response to the blizzard. Key interview topics included disaster preparation, disaster response during the storm, post-storm reflections, public communications, response technology, agency capacities, and partner agency coordination.
- **For the South Carolina Department of Health and Environmental Controls (SC DHEC) Coronavirus Relief Fund Program**, Victor facilitated the oversight and administration of $3M of CARES Act funding from the Centers for Disease Control and Prevention for the South Carolina Department of Health and Environmental Control, maintaining state and federal compliance standards. He conducted Salesforce and grant reporting training for 50+ community-based organization, school district, and SC DHEC staff. Users were trained in accordance with federal and state grant reporting requirements.

3.8.56 Kiley Fitzgerald, CDBG-DR Compliance and Monitoring Analyst I

Kiley is an experienced senior professional with exposure to large-scale, climate-induced disaster recovery and mitigation efforts (DOE GRIP, FEMA PA, Mutual Aid EMAC/IMAS, HUD CDBG-DR and NDR), as well as practice related to epidemiological socioeconomic disaster recovery (ARPA–SLFRF and CPF) landscapes. Kiley extends her expertise into climate-related policy, supporting clean energy initiatives within housing and utility markets in the Midwest to proactively strengthen our energy grid and modernize homeowner energy rebate programs. She specializes in project management, federal compliance, outreach and community engagement, data visualizations and dissemination, and financial and performance reporting, and is experienced in federal regulations, compliance and monitoring, and lifecycle of grants/project management as it relates to both *the Federal Acquisition Regulation (FAR) and 2 CFR 200, as well as HUD CPD and FEMA PA auditors. Kiley is an articulate, sharp communicator who can adapt and distill key solutions efficiently and effectively for clients to expediate action in local communities.*

Degree/Education/Certifications	**Years of Experience**
• Master of Urban and Regional Planning, University of Michigan • B.S., Public Affairs, Indiana University	4 Years

Areas of Expertise

- Grant compliance and monitoring
- Disaster recovery and emergency management
- Program and policy development
- Project management

Relevant Experience

- **For the New Mexico Department of Homeland Security and Emergency Management (DHSEM) FEMA PA**, Kiley leads a team to reconcile over $342M+ worth of FEMA PA projects by establishing reimbursement and closeout SOP and policy for client to accommodate shifting federal rules and expedite funds. She is knowledgeable on mutual aid systems and policy by directing EMAC/IMAS mutual aid program reimbursements, documentation review, and 100% financial audit closeout. Kiley manages a team of 10 reimbursement specialists and closeout specialists through highly political wildfire financing and reimbursement. She has developed risk assessment for subrecipients by adapting language and risk with local disaster related issues and history in New Mexico/West Coast. She monitored financial records for Army & Air National Guard State Activation to catalyze project obligation and reimbursement of $2.5M wildfire recovery initiative. Kiley has streamlined clients' Mutual Aid (EMAC/IMAS) procedures from 2014 to modernize language and processes for rapid resource management of fire suppression efforts and general disaster aid.
- **For the State of South Carolina/ARPA SLFRF PMO**, Kiley acted as a State and Local Fiscal Recovery Funds and Capital Project Funds professional for on demand technical assistance and ad hoc issue management. She developed grant management policies and procedures for federal reporting practices across seven state agencies for SLFRF and CPF federal programs to enhance client's vision and management of $2B+ federal funds. She configured a publicly accessible PowerBI dashboard highlighting spatial data and financial metrics for transparent, accessible viewership across the State of South Carolina. Kiley initiated data collection for project and expenditure reporting and executed reports covering 100+ SLFRF projects quarterly. She wrote the Annual Recovery Performance Report for the entire State of South Carolina which included commentary on legislation, pandemic revenue loss, and workforce development. She leveraged legislative expertise for clients involving federal regulations such as 2 CFR 200 for eligibility reviews, compliance program development, and procurement and expenditure tracking. Kiley advised multiple agencies on subrecipient and contractor determinations, federal procurement regulations, and fiscal management which led to risk reduction and more thorough state policy.
- **For the City of Joplin, MO/ARPA, BIL, and IIJA Grants Management**, Kiley won over $60M+ for local client through tailored prioritization framework, innovative local investment and financing, and reliable outreach strategies. She established prioritization framework, published a survey, and wrote an assessment for a local municipality's project selection to rapidly and effectively assess local community priorities in light of unprecedented fiscal surplus. She tracked, monitored, and reviewed 75+ grant notice of funding opportunities from federal and state sources to assist the client with grant applications and competitive strategy. Kiley managed over 22 federal and state grant applications across several teams comprised of grant writers, project partners, and city staff/elected officials, all to win more investment through high-profile grants. She prepositioned grant applications through research of past awards, reviewer priorities and draft sessions, and critical analysis of project scoping. She hosted weekly client updates that involved revolving city staff and elected officials and worked to align departments with future grant applications. Kiley represented the client at monthly public City Council meetings to garner community support and involvement in grant pursuits. And she collaborated with city staff on urban planning initiatives and employed knowledge

across municipal developments such as workforce development, industrial redevelopment, neighborhood assistance programs, transportation projects, water and sewer upgrades, and public safety equipment.

3.8.57 Hannamarie Hohener, CDBG-DR Compliance and Monitoring Analyst I

Hannamarie is a Consultant in Guidehouse's State and Local Government practice. She brings expertise in data analysis, data visualization, and municipal budgets. Her proficiency extends to both intra-departmental data analysis and comparative analysis across peer municipalities. Ms. Hohener consistently enhances data comprehension through contextualization of visualization. She has a deep understanding of municipal budgets across various departments while maintaining an awareness of various funding streams that support municipal governments. She has spent most of her career to date in government agencies and nonprofits with a person in environment experience developing a deep understanding of constituent needs and concerns. In addition, she has assisted many individuals and nonprofits in applications for grants distributed by the local, county, and state level.

Degree/Education/Certifications	Years of Experience
• M.A., Social Work, Social Policy, and Social Administration, University of Chicago • B.S., Legal Studies and Social Work, University of Wisconsin Madison	3 Years

Areas of Expertise

- Grant compliance and monitoring

Relevant Experience

- **For the City of Chicago Office of Budget Management – CDBG-DR**, Hannamarie contributed to the development of the City's CDBG-DR Action Plan. She conducted an unmet housing needs assessment using data from FEMA, HUD, and NFIP. Additionally, Hannamarie assisted in creating all CDBG-DR financial policies. She analyzed public comments by sentiment, content, and medium to inform recommendations on how to respond to comments. Hannamarie is currently working with the city to establish a chart of accounts aligned with DRGR.
- **For Cook County – ARPA**, Hannamarie oversaw the realignment of all county ARPA programs to align with federal priorities, thereby ensuring program integrity throughout changes in administration. She also provided recommendations on sustaining these programs, taking into account varying levels of risk.
- For the City of Chicago Office of Budget - ARPA, Hannamarie supported the strategy team in understand program risk to meeting obligation and expenditure deadlines to create a plan of sustainability for longevity of 52 community programs. She conducted a detailed spend analysis targeting trends across program lifetime to present to department heads providing context to where their program currently stands. She administered workshops for program leads to enhance the completion of a program informational and multi-year budget template. Hannamarie delivered conducted analysis comparing the American Rescue Plan (ARP) allocation to obligation and spend across 10 peer cities, along with analyzing peer cities expenditure categories related to ARP dollars. Hannamarie supported the development of a plan for program sustainability post ARP dollars for Chicago community programs.
- During her time with Joining Forces for Families in Madison, WI, Hannamarie advocated for clients' housing needs before government organizations, facilitated over ten successful rent assistance applications, and provided both counseling and legal resource referrals for clients facing poverty and rights challenges. Their empathetic approach ensured that individuals received essential support, from financial aid to guidance on legal matters.

3.8.58 Augusta Udemba, CDBG-DR Case Reviewer

Augusta is a licensed attorney and versatile expert in compliance, regulatory affairs, and risk management, with deep experience in KYC, AML, SAR, financial crime compliance, and consumer financial protection. She has conducted client reviews, identified red flags, and facilitated risk assessments for prospective clients, consistently adapting to evolving industry trends. Known for her strategic thinking and results-driven approach, Augusta is a trusted business partner who collaborates across functions and influences diverse stakeholders. She excels at translating complex legal concepts, navigating regulatory ambiguity, and identifying critical policy developments, bringing tenacity and analytical precision to every challenge.

Degree/Education/Certifications	Years of Experience
• Master of Laws – LL.M, Wake Forest University • Barrister at Law, Nigeria Law School • Nigeria Bachelor of Laws – LL.B., Igbinedion University	3 Years

Areas of Expertise

- Grant compliance and monitoring
-

Relevant Experience

- **For the National Aeronautics and Space Administration,** Augusta provided direct support to NASA employees via the Business and Administrative System Office (BASO) Helpdesk, resolving financial and software related inquires to ensure timely and confident completion of deliverables.
- **For the New York State Office of Temporary and Disability Assistance's Emergency Rental Assistance Program,** Augusta reviewed intake applications to verify applicant and expense eligibility, conducted case investigations, and analyzed submissions to identify potential fraud.
- **For the Small Business Administration (SBA), Paycheck Protection Program (PPP),** Augusta conducted reviews of high-value loan applications to assess eligibility and detect anomalies, misrepresentation, and fraud indicators, determining whether further investigation was warranted.

3.8.59 Xavier Concha, CDBG-DR Case Reviewer

Xavier is an experienced Bilingual Customer Service Executive with extensive expertise in customer service, account management, quality assurance, escalations, and employee development and training. He has demonstrated proficiency in process reengineering, contract negotiation, and managing key accounts. Xavier is known for leading projects efficiently, fostering team engagement, and consistently surpassing company expectations through creativity and hands-on leadership.

With over 20 years of experience in the customer service industry, including B2B, BPO, and both private and public sectors, Xavier brings a wealth of knowledge to his roles. He possesses more than 6 years of experience in finance and banking, over 5 years in public utilities, 4 years in construction and solar, as well as state and federal solutions, and more than 20 years in call center management.

Degree/Education/Certifications	Years of Experience
• Bachelor of Law, UDEM Mexico	20 Years

Areas of Expertise

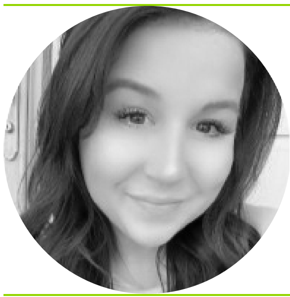
- Data Analysis
- Project Management
- Conflict management & Resolution
- Process Improvement
- Team Leadership
- Financial Analysis

- Customer Advocacy
- Training & Development
- Root Cause Analysis
- Documentation Management
- Quality Analyss
- P & L

Relevant Experience

- **For Georgia Environmental Finance Authority,** Xavier manages day-to-day operations of the program's contact center, providing training, coaching, and development to a specialized team of customer service representatives while ensuring alignment with client expectations.

3.8.60 Ashley Jaynes, CDBG-DR Claims & Appeals Reviewer



Ashley assists the State and Local Government practice with general admin tasks, staffing initiatives, proposal development, and project admin. During her time with Guidehouse, Ashley has contributed to multiple grants management and disaster recovery projects following the impact of the COVID-19 pandemic.

Degree/Education/Certifications	Years of Experience
• Lean Six Sigma Yellow Belt	4 Years

Areas of Expertise

- Grants Management
- Disaster Recovery
- Project Administrative and Forecasting
- Policy Guidance and Training

Relevant Experience

- **For the State of Florida Small Business Loan Hurricane Relief,** Ashley reviewed documents to confirm project qualifications were met and sent applications up to project leadership for payment or denial as applicable. Ashley attended daily client meetings where she initiated and assisted in the discovery of a large fraud application batch within the system and was able to identify patterns later used to pull and deny all related fraudulent applications.
- **For the Massachusetts Emergency Management Agency,** Ashley ran weekly reports tracking utilization and hours spent on each applicant, conducted outreach to team mates on timesheet guidance, created timekeeping guidance and materials, and completed weekly deliverables outlining project financials and level of effort per applicant and subsequent project.
- **For the State of Vermont Flooding Project,** Ashley works with our Custom Solutions Team on subcontractor management, task order creation and updates, onboarding, and timekeeping tracking. Ashley works as a liaison between the project management team and the Custom Solutions Team to ensure all back end project management tasks are completed in a timely manner, all timesheets are up to FEMA standard, and escalates issues to the project management team as needed.
- **For the New York State Emergency Rental Assistance Program,** Ashley led a team of specialists and supervisors in processing rental assistance applications for residents who had been affected financially by the COVID-19 pandemic. Ashley stayed up to date on all policy guidance and conducted trainings and quality control reviews with all team members to ensure directives were met and applications were processed accurately in a timely manner. With her leadership, the client was able to issue over $3 Billion in Emergency Rental Relief funding to New York State landlords, keeping residents in their homes.

3.8.61 Michelle Simon-Tomlin, CDBG-DR Claims & Appeals Reviewer

Michelle is an Operations Manager and People Manager in Guidehouse's State and Local Government practice, bringing years of leadership experience across public sector programs. Her expertise spans housing, energy grants, and contact center operations, where she has led large teams, streamlined workflows, and ensured compliance with program requirements. Michelle is known for her ability to foster team development, manage complex engagements, and deliver operational excellence in dynamic environments.

Degree/Education/Certifications	Years of Experience
	11 Years

Areas of Expertise

- Real Estate
- Leadership and Operations Management
- User Acceptance Testing (UAT) Specialist
- Auditing
- Call Center Management

Relevant Experience

- **For the State of Georgia's Energy Rebate Program,** Michelle led her team through pilot and full launch of project, including hiring, training and job aids. Reviewing grant applications to assure quality assurance and well as reporting any indicia of fraud. Managing both application review and call center teams. Coordinating with internal departments to maximize operational efficiency across production.
- **For New York State, Office of Temporary and Disability Assistance, Emergency Rental Assistance Program,** Michelle supervised a review team in a Quality Control/Investigative capacity, Worked with the Operations and MCF Teams to move complex subsidized housing applications forward for expeditious payment by investigating W9 rejections to confirm property ownership and reviewing arrears for accuracy. Supervised team doing outbound calls to tenants and landlords to address various inquiries, as needed.
- **For the State of Michigan Growing my business program,** Michelle managed a team to conduct thorough grant applications. Managed all call center activities and reporting to client. Coordinating with internal departments to maximize operational efficiency across production and administrative areas. Performed daily auditing of program applications, performance of team responsibilities and goals.
- **For Wayne County Emergency Rental Assistance Program,** Michelle managed all call center operations including reporting to leadership.

3.8.62 Shaela Manross, CDBG-DR Admin Support

Shaela is an Operations Support Specialist assisting the South State and Local Government team with their project management initiatives. She collaborates with project managers to proactively identify and implement process improvement strategies and partners with account leadership to drive execution. Shaela brings experience in public sector operations, communications, subcontractor coordination, government contracting, and project delivery.

Degree/Education/Certifications	Years of Experience
• M.A. Teaching, Liberty University • B.S. Intercultural Studies, Columbia International University	11 Years

Areas of Expertise

- Communications
- Project Management

Relevant Experience

- **For the Louisiana Legislative Auditor,** Shaela provides project management support for both the Louisiana Fiscal Responsibility Program and the Department of Children and Family Services Re-Organization Project. She facilitated onboarding for over 30 team members and coordinated engagement documentation and compliance forms for all staff. Shaela also supports invoice preparation and submission by maintaining detailed analysis of project hours, labor category mappings, and ensuring accurate billing and audit readiness.
- **For the State of Georgia's Energy Rebate Program,** Shaela supports the project management team with invoicing and subcontractor coordination, managing the project roster of Guidehouse staff and subcontractors. She also facilitates team coordination to maintain mission-critical databases that track project spending, employee hours, and time reporting.
- **For the Georgia Department of Corrections,** Shaela led onboarding and project extension efforts for the second phase of the engagement. She conducts bi-weekly invoice and forecast reviews, maintains implementation trackers, contributes to program design and delivery, and supports monthly invoicing to ensure accuracy and alignment with client expectations. She also facilitated resource alignment for new subcontractor team members.
- **For Harris Health Systems**, Shaela supported FEMA Public Assistance program administration for the Hurricane Harvey recovery project, overseeing subcontractor compliance and audit coordination to ensure timely responses and accurate documentation for contract closeout. She also contributed to monthly invoicing, maintaining precision and consistency with client expectations.
- **For New York State's Office of Temporary and Disability Assistance,** Shaela managed communications with applicants and landlords for the Emergency Rental Assistance Program. She collaborated with the client to standardize communication workflows and improve operational efficiency across outreach channels, prepared and reviewed application status notices, tracked project communications, developed training materials, and led client shadowing sessions for project closeout.

3.8.63 Chloe Tucker, CDBG-DR Admin Support

Chloe Tucker supports the Guidehouse State Health State and Local Government team with project management activities. She identifies process improvement opportunities and works with client and account management leadership to develop and implement these plans. Her background includes experience in the public sector, supporting grant management, subcontractor management, government contracting, contact center management, and project management.

Degree/Education/Certifications	Years of Experience
• B.A., Psychology, North Carolina State University • Lean Six Sigma Yellow Belt	7 Years

Areas of Expertise

- Project Management
- Forecasting and Budget Management
- Call Center Management
- Staffing

Relevant Experience

- **For the State of South Carolina's Homeowner Assistance Fund program,** Chloe led the Project Management Office from September 2022 to the end of the project in October 2024. Her work included invoicing, subcontractor management, and weekly performance reports for local governments, leadership, and the South Carolina Advisory Panel.

- **For the State of South Carolina's Emergency Rental Assistance Program,** Chloe assisted with the Project Management Office from February 2024 until December 2024. Her work includes, invoicing, subcontractor management, and workstream reporting.
- **For Georgia Environmental Finance Authority,** Chloe created and managed the Project Management Office from February 2024 until February 2025. She created standard procedures for subcontractors, onboarding, invoicing, and reporting. Ms. Tucker also created and managed the project management dashboard used by project leadership for direct decision making.
- **For the Florida Department of Commerce,** Chloe assisted in distributing Small Business Emergency Bridge Loans (EBL) which allowed small businesses to recover from the effects of hurricanes Milton and Helene. From November 2024 to December 2024, Chloe accurately reviewed applications at twice the expected rate. She also worked with the client to create a process for identifying specific patterns that pointed to fraudulent applications.
- **For South Carolina's Richland County,** Chloe supported the county's Community Impact Grants (CIG) lifecycle performing eligibility determinations from February 2025 to April 2025. This included ensuring compliance and eligibility of funds, providing accurate reporting requirements, and evaluating potential risk factors for the client to ensure they have used ARPA funds accurately. Chloe assisted in creating final reports capturing detailed analyses on applicants, funding requests and distribution and presented various recommendations to improve the application process.

4.0 Examples

Team Guidehouse is honored to present a selection of our experience in support of the North Carolina Department of Commerce, Division of Community Revitalization (DCR). As a nationally recognized leader in federal grants management and disaster recovery, Guidehouse has served as a trusted advisor to the U.S. Department of Housing and Urban Development (HUD) and numerous state and local governments across the country. Our work spans the full lifecycle of Community Development Block Grant–Disaster Recovery (CDBG-DR) programs—from policy development and program design to implementation, compliance, and closeout.

We understand the urgency and complexity of disaster recovery and the importance of having a reliable partner who can deliver with precision, integrity, and agility. The examples provided in this section reflect our deep experience in the areas most critical to DCR's mission, including financial oversight, program performance monitoring, procurement compliance, and technical assistance. Each project demonstrates our ability to deploy qualified personnel, scale rapidly, and deliver results that meet federal and state requirements.

We appreciate the opportunity to support DCR's efforts to rebuild communities impacted by Hurricane Helene and to contribute meaningfully to North Carolina's long-term recovery.

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:	New York Office of Resilient Homes and Communities (RHC)
Program:	HUD CDBG-DR **Period of Performance**: 3/2013 – 4/2025
Brief Description of Services Rendered:	Guidehouse brings a decade of direct experience delivering the full spectrum of services outlined in the RFP—policy development, program administration, compliance, monitoring, financial oversight, and technical support—through our long-standing engagement with New York State's Resilient Homes and Communities (formerly GOSR). This experience mirrors the scope and complexity of North Carolina's CDBG-DR program and demonstrates our ability to provide qualified staff augmentation across all task order categories. **Standing Up and Scaling Operations (Task 1)** When New York received $8 billion in CDBG-DR funds after Superstorm Sandy, the state had no recovery office. Guidehouse helped establish the Governor's Office of Storm Recovery from the ground up, creating governance structures, drafting program policies, and developing SOPs for housing, infrastructure, and economic revitalization programs. We designed procurement workflows, authored procedure manuals, and trained staff—activities that directly align with DCR's need for rapid mobilization and standardized processes. **Example Deliverables:** • Program-specific SOPs for housing and buyout programs • Procurement process flows and compliance checklists • Training materials and job aids for new staff **Compliance, Monitoring, and Risk Management (Tasks 2, 3, 4, 10)** Guidehouse partnered with RHC's Monitoring & Compliance team to build a structured framework for risk-based monitoring across housing, infrastructure, and small business programs. We created policies, templates, and QA/QC tools to confirm adherence to HUD and state requirements. Our team also developed DOB prevention protocols, financial oversight dashboards, and fraud detection strategies—capabilities that map directly to DCR's task categories for financial compliance, DOB, procurement monitoring, and audit readiness. **Key Achievements:** • Designed six-month monitoring plans and compliance templates • Built dashboards to track procurement and financial performance • Supported HUD monitoring visits and internal audits with readiness reviews **Program Implementation and Case Management (Tasks 5, 6, 7, 15)** Guidehouse provided day-to-day operational support for housing and small business programs, including intake, eligibility, appeals, and closeout. We implemented QC solutions for award packages, reducing error rates and accelerating disbursements. For infrastructure programs, we redesigned

	organizational structures and implemented real-time reporting dashboards for $1B+ in capital projects. These efforts align with DCR's requirements for case review workflows, Action Plan development, needs assessments, and grant management. **Representative Activities:** • Developed and updated Action Plan language and amendments • Conducted unmet needs and mitigation analyses to guide resource allocation • Delivered GIS-based dashboards for project tracking and public transparency **Technical and Engineering Support for Infrastructure and Housing Projects (Task 11)** Initially engaged to assess risk, governance, and vendor performance within the Housing Construction Program, Guidehouse conducted field interviews and monitoring to identify operational inefficiencies and recommend improvements. Following Guidehouse's assessment of GOSR's Single Family Housing Program and Construction Program, Guidehouse was asked to expand its role and continued to provide program support in a compliance monitoring capacity. Guidehouse developed and implemented a quality assurance/quality control (QA/QC) work plan to assess compliance against construction program procedures. Monthly reports documented deficiencies and provided recommendations to improve program efficiency and ensure alignment with program goals. **Key Activities** • Conducted field interviews and vendor performance assessments for the Housing Construction Program • Evaluated Call Center operations and recommended staffing adjustments to improve efficiency • Developed QA/QC work plans, monitoring checklists, and scoring systems for compliance testing • Produced monthly reports summarizing deficiencies and recommending corrective actions • Supported closeout operations by addressing documentation gaps and streamlining award package distribution **Training, Technical Assistance, and Transition Support (Tasks 8, 12, 14)** Guidehouse has delivered targeted training for compliance, procurement, and program operations, supported stakeholder engagement strategies, and managed transition planning for agency reorganization. Our approach emphasizes knowledge transfer and sustainability, preparing state teams to maintain compliance and performance long after program closeout. **Examples:** • Created training curricula for monitoring staff and subrecipients • Developed public information materials and outreach strategies • Led organizational assessments and transition plans for program closeout **Outcome and Alignment to DCR's Priorities** DCR's RFP calls for a partner that can provide **qualified personnel, scalable staffing, and proven systems** to support every phase of CDBG-DR

	administration. Guidehouse has done this at scale for one of the largest recovery programs in U.S. history, delivering results that HUD recognized as best practices. Our experience spans every task order category in the solicitation—from policy drafting and DOB compliance to geospatial analysis and infrastructure oversight—making us uniquely positioned to help DCR accelerate recovery, maintain compliance, and achieve measurable outcomes for North Carolina communities.

Example 2	
Client Name:	City of Joplin, Missouri
Program:	HUD CDBG-DR **Period of Performance**: 7/2017 – 12/2021
Brief Description of Services Rendered:	Guidehouse's work with the City of Joplin demonstrates our ability to deliver end-to-end CDBG-DR program administration—from policy design to closeout—under conditions that mirror the complexity and urgency of North Carolina's recovery needs. Following the EF-5 tornado that devastated Joplin in 2011, the city received \$158 million in HUD CDBG-DR funds to restore housing, rebuild infrastructure, and revitalize its economy. Guidehouse served as the City's program administration partner, providing strategic planning, operational execution, compliance oversight, and stakeholder engagement across every major task area outlined in this RFP. **Program Planning, Policy Development, and Administrative Support (Task 1)** Guidehouse stood up Joplin's recovery framework from the ground up. We authored program policies and SOPs for housing, infrastructure, and public service programs, incorporating federal cross-cutting requirements such as NEPA, URA, Section 3, and Davis-Bacon. Our team developed an Integrated Master Schedule (IMS)—recognized by HUD as an exemplary practice—to track milestones across dozens of projects and align them with funding deadlines. Weekly coordination meetings with city leadership and subrecipients used this schedule to identify risks and implement mitigation strategies. We also created Project Execution Plans (PEPs) for every major project, summarizing scope, budget, beneficiaries, and compliance checkpoints. These tools informed DRGR reporting and quarterly progress updates, giving leadership a clear line of sight into performance and risk. **Compliance, Monitoring, and Risk Management (Tasks 2, 3, 4, and 10)** Guidehouse implemented a risk-based monitoring framework that prioritized high-risk subrecipients for more frequent reviews. We developed compliance manuals and monitoring templates that HUD later cited as best practices for other grantees. Our team conducted procurement reviews, financial control assessments, and site inspections to confirm adherence to 2 CFR 200 and HUD requirements.

	We also supported audit readiness by creating monitoring checklists, conducting internal audits, and preparing the City for HUD and OIG reviews. These efforts reduced exposure to findings and prevented potential clawbacks. **Action Plan Execution, Needs Assessment, and Geospatial Support (Tasks 6 and 7)** Guidehouse's analytics team delivered unmet needs assessments and resource allocation models that guided program design and funding priorities. We integrated FEMA, SBA, and local data into a centralized system of record and layered social vulnerability indicators to target the most impacted and distressed areas. To promote transparency, we launched a GIS-based dashboard that displayed project locations, budgets, and progress in real time. This tool became a cornerstone for public reporting and leadership decision-making. **Program Implementation and Case Management (Tasks 5, 11, and 15)** Guidehouse managed intake and eligibility for housing programs, operating a centrally located intake center and mobile pop-up events to reach low- and moderate-income households. We processed more than 1,500 applications for down payment assistance and managed construction oversight for single-family and multifamily housing, infrastructure, and public facilities. Our team acted as Owner's Representative for major infrastructure projects, overseeing procurement, hosting pre-bid meetings, and monitoring compliance with labor standards and environmental requirements. We also supported economic revitalization programs, including small business assistance and workforce development initiatives. **Program Performance, Policy Adherence, and Environmental Review Support (Tasks 8, 9, and 17)** Guidehouse developed and maintained an IMS to track milestones across all programs and projects. This schedule was reviewed weekly with subrecipients and internal departments to assess risks and mitigation strategies. Guidehouse also created project execution plans (PEPs) for each project, which summarized scope, budget, beneficiaries, and compliance with National Objectives. These plans informed quarterly progress reports submitted through DRGR and supported the development of a GIS-based dashboard to track financial data across all grant projects. The team ensured compliance with Section 3, Davis-Bacon Act (DBA), and prevailing wage requirements across housing and infrastructure activities. Guidehouse hosted weekly coordination meetings with construction vendors to monitor scope, budget, and schedule, while verifying adherence to HUD CDBG-DR requirements including NEPA, Section 3, and DBA. Routine onsite inspections, wage interviews, payroll reviews, and OSHA certification checks were conducted to ensure labor standards compliance, and restitution was facilitated when necessary. In support of historic preservation, Guidehouse coordinated with the State Historic Preservation Office (SHPO) during environmental reviews to protect historic buildings. These efforts were part of broader Tier 1 and Tier 2

	environmental reviews conducted for housing programs, ensuring compliance with federal preservation and environmental standards. **Training, Technical Assistance, and Outreach (Tasks 12 and 14)** Guidehouse developed and delivered training for city staff and subrecipients on compliance, procurement, and program operations. We also led a comprehensive stakeholder engagement strategy, reaching over 20,000 residents through public meetings, social media campaigns, and community events. These efforts built trust, improved program participation, and strengthened transparency. **Outcome and Alignment to DCR's Priorities** Guidehouse's work in Joplin resulted in the successful delivery of housing, infrastructure, and economic revitalization programs that met HUD requirements and avoided financial penalties. Our tools—such as the IMS, GIS dashboards, and compliance frameworks—are directly transferable to North Carolina's recovery programs. This experience demonstrates our ability to: • **Rapidly mobilize** and establish governance structures • **Develop policies and SOPs** that meet federal and state standards • **Integrate data and analytics** for needs assessments and resource allocation • **Manage complex housing and infrastructure programs** from intake through closeout • **Maintain compliance and audit readiness** across all program areas • **Engage stakeholders and deliver transparent reporting** Guidehouse is prepared to bring this proven model to DCR, delivering the staff, systems, and strategies needed to accelerate recovery and achieve measurable outcomes for North Carolina communities.

Example 3	
Client Name:	Harris County, Texas
Program:	HUD CDBG-DR, FEMA Public Assistance and Hazard Mitigation Grant Program, and FHWA Emergency Relief **Period of Performance**: 11/2018 – 12/2024
Brief Description of Services Rendered:	When disaster strikes at scale, public agencies need more than fractional help; they need a partner that can mobilize rapidly, slot in alongside existing teams, and deliver measurable results under federal scrutiny. Guidehouse has done exactly that on some of the nation's largest recoveries. Our Harris County engagement after Hurricane Harvey is a clear parallel to the Division of Community Revitalization's needs: multiple funding streams, overlapping requirements, and the imperative to restore housing, infrastructure, and economic vitality while maintaining transparency and audit-ready files. We brought strategic planning, program design, compliance oversight, and day-to-day execution across every task category contemplated in this RFP—capabilities we are ready to deploy for North Carolina.

	Strategic Program Planning and Policy Development (Task 1) Harris County engaged Guidehouse to stabilize and scale a portfolio exceeding $1.5 billion in HUD CDBG-DR, FEMA Public Assistance, and FHWA Emergency Relief funding following Hurricane Harvey. We began by translating unmet needs into actionable strategy for a $1.115 billion CDBG-DR allocation, facilitating a countywide method of distribution and drafting Supplemental Action Plan content and waiver justifications. Through structured design workshops, we documented program goals, allocation rationales, staffing models, and end-to-end workflows from intake through closeout. Policies and SOPs were authored for housing, infrastructure, and economic revitalization programs, with each step tied to explicit roles, approvals, and recordkeeping so frontline staff had clear guidance and executives had dependable oversight. To keep delivery synchronized across departments, we stood up a cross-program Project Management Office and an Integrated Master Schedule that tracked milestones, dependencies, and risk indicators in one view. This operating cadence allowed leadership to make early tradeoffs, address bottlenecks before they spread, and keep programs moving against federal deadlines. **Compliance, Monitoring, and Risk Management (Tasks 2, 3, 4, and 10)** Guidehouse built a risk-based monitoring framework that covered subrecipients and vendors across CDBG-DR, FEMA PA, HMGP, and FHWA-ER. We developed compliance manuals, desk-review templates, testing workbooks, and issue-tracking routines so reviewers worked from a common playbook and observations translated quickly into corrective action. Duplication-of-Benefits prevention protocols, procurement compliance reviews, and financial oversight dashboards reduced exposure and kept documentation consistent with federal expectations. Data integrity underpinned everything. Our team managed the county's DRGR inputs and integrated the TIGER document repository, establishing a clear chain from source records to reports. This approach shortened response times during HUD and OIG reviews and positioned the portfolio for timely closeouts. **Training, Technical Assistance, and Relocation Compliance Support (Tasks 12 & 13)** As part of its program administration services, Guidehouse prepared and delivered applicant resources, applications, and trainings to eligible beneficiaries across housing and infrastructure programs. These trainings supported program understanding and compliance with federal requirements, including HUD CDBG-DR guidelines. In support of relocation efforts, Guidehouse helped design and implement the county's Buyout & Relocation program, which served approximately 800 homes. The team facilitated program design sessions with public and county stakeholders to determine the method of distribution and subrecipient allocations. Guidehouse also supported the development of policies and procedures for housing programs, including relocation, and oversaw the collection of compliance documentation to ensure adherence to federal standards. **Housing and Infrastructure Program Implementation (Tasks 4, 6, 11, and 15)**

	Program implementation spanned the full lifecycle. In housing, we structured the county's major initiatives and advanced a portfolio exceeding $880 million, including large-scale rehabilitation and reconstruction, buyouts and relocation of properties in high-risk areas, down-payment assistance for first-time buyers, and homeowner reimbursement for storm-related costs. Intake, eligibility, case progression, and applicant communications ran on standardized workflows, while documentation, labor-standards administration, and environmental clearances were managed to keep files complete and cases moving. In infrastructure, we partnered with the engineering department to validate cost estimates, design sound procurement approaches, and sequence capital projects against construction market realities. Capital planning tools and compliance workflows anchored schedules and budgets, and weekly coordination with project sponsors maintained momentum from notice to proceed through completion. **Organizational Strategy and Technical Systems Support (Tasks 7, 8, 14, and 16)** Harris County asked for more than program staffing; it needed a durable way to coordinate funding streams and departmental delivery. Guidehouse helped establish a Strategic Recovery Office with a clear charter, escalation paths, and a decision calendar that tied planning, funding opportunities, and execution together. Performance dashboards gave executives a live view into throughput, aging, budget burn, and risk flags, while a public-facing transparency portal displayed commitments and progress by geography and program, building trust with residents and elected officials. On the systems side, we defined DRGR data standards, reporting structures, and document-management protocols, connecting the system of record to analytics and to the curated file tree used for monitoring and audits. The result was less double work for staff and faster, cleaner pulls for oversight bodies. **Outcome: A Scalable Model for North Carolina** Harris County advanced a multi-billion-dollar recovery with speed and discipline. Housing programs reached thousands of residents through reconstruction, buyouts and relocation, down-payment support, and reimbursements. Infrastructure and economic development projects progressed under unified governance and transparent reporting. Throughout, Guidehouse coordinated with HUD and FEMA, produced Action Plan materials and waiver justifications, assembled closeout packages, and maintained a steady rhythm of monitoring and remediation. This is the same blend of capabilities DCR seeks in its staff augmentation pool. We mobilize qualified personnel across policy and SOP development, grant management, procurement and compliance, claims and case reviews, performance monitoring, training and technical assistance, environmental review, and technical systems specification. Just as important, we work within agency structures, leaving behind tools and routines that teams can sustain: governance calendars, SOPs with embedded controls, DRGR data standards, monitoring templates, and dashboards tied to the underlying record. **Outcome and Alignment to DCR's Priorities**

	The Harris County experience shows how our approach converts allocation into action without sacrificing rigor. The planning layer clarifies where dollars go and why. The operating model keeps cases and projects moving. The compliance and data spine produces files that withstand scrutiny. The dashboards and public portal bring clarity to leadership and residents alike. For DCR, that translates into a ready bench that can plug into task orders on day one, carry complex workstreams with minimal lift from state staff, and leave a durable framework that supports timely delivery, complete documentation, and confidence during oversight.

Example 4	
Client Name:	Texas General Land Office (GLO)
Program:	HUD CDBG-DR **Period of Performance**: 01/2019 – 11/2023
Brief Description of Services Rendered:	Environmental review and damage assessment are critical path activities in any CDBG-DR program. Delays in these areas can stall housing reconstruction, jeopardize compliance, and expose grantees to audit risk. Team Guidehouse brings a proven solution through **Metric**, our specialized partner with deep experience supporting large-scale housing recovery programs under HUD's stringent requirements. Metric's work for the Texas General Land Office's Homeowner Assistance Program demonstrates the exact capabilities DCR requires: tiered environmental reviews under 24 CFR Part 58, field inspections, GIS-enabled mapping, and regulatory coordination across multiple agencies. Their approach combines technical rigor with technology-driven efficiency, reducing review timelines and strengthening documentation for audit readiness. By integrating custom geospatial applications, advanced QA/QC protocols, and real-time compliance tracking, Metric has helped Texas accelerate recovery for thousands of homeowners while maintaining full alignment with HUD, NEPA, and local code requirements. These same capabilities can be deployed in North Carolina to deliver faster clearances, defensible records, and transparent reporting—all essential for meeting federal standards and DCR's program goals. **Program Planning, Performance Monitoring, Civil Rights Compliance, and Audit Readiness (Tasks 1, 8, 9, and 10)** Metric contributed to program planning and administrative support by designing a custom GIS web application that integrates data from multiple regulatory sources. This tool streamlined environmental review mapping, improved quality control, and enhanced operational efficiency. The application supported consistent documentation and reduced manual effort, contributing to more effective program execution. Metric conducted hundreds of field inspections to assess storm damage and monitor construction progress. These inspections ensured that homes were built or rehabilitated in accordance with applicable local codes, rehabilitation standards, and zoning ordinances. Metric verified compliance with the 2012

	International Residential Code or higher, and Housing Quality Standards, supporting performance tracking and program integrity. Metric ensured compliance with civil rights and housing standards by verifying that rehabilitation projects met all applicable local codes and ordinances. The team also conducted permitting and inspection reviews to confirm adherence to safety and zoning requirements, contributing to equitable and compliant housing recovery. Metric's detailed documentation and inspection protocols supported audit readiness. The team's consistent verification of permitting, code compliance, and construction standards ensured that all program activities were well-documented and aligned with federal and local requirements, facilitating future audits and oversight. **Comprehensive Environmental Review and Compliance (Task 17)** Metric performs tiered environmental reviews under 24 CFR Part 58, addressing all applicable federal cross-cutting authorities, including floodplain management, wetlands protection, historic preservation, and endangered species. Field teams conduct on-site inspections to verify site conditions, document environmental factors, and confirm compliance with NEPA and related laws. This includes preparing Environmental Assessments (EAs), Categorical Exclusions, and Environmental Impact Statements where required—activities that align directly with the RFP's environmental review requirements. **Damage Assessment and Cost Estimation (Tasks 11 and 15)** Metric provides damage assessments and cost estimates that inform program design and eligibility determinations. Using CAD data, FEMA flood maps, and local permitting records, the team produces accurate cost models for rehabilitation and reconstruction projects. These assessments feed directly into program workflows, supporting intake, eligibility, and benefit calculation processes that DCR will manage under its housing programs. **GIS-Enabled Mapping and Data Integration (Tasks 7 and 16)** Metric developed a custom GIS web application that integrates data from multiple regulatory sources, streamlining mapping, quality control, and reporting. This platform consolidates environmental review data, floodplain overlays, and historic preservation layers into a single interface, reducing manual errors and accelerating review cycles. For DCR, this capability translates into faster environmental clearances, stronger audit readiness, and improved transparency through geospatial dashboards—tools that can also support public-facing reporting and internal performance monitoring. Construction Oversight and Standards Verification (Tasks 4 and 6) Environmental compliance does not end with clearance. Metric's inspectors monitor construction activities to confirm adherence to local building codes, HUD rehabilitation standards, and Housing Quality Standards (HQS). This oversight reduces the risk of noncompliance findings and protects program integrity by validating that completed work meets all regulatory and safety requirements. **Outcome and Alignment to DCR's Priorities**

	Metric's approach has enabled Texas GLO to shorten review timelines, improve documentation quality, and maintain full alignment with HUD requirements across thousands of housing projects. By combining field expertise, advanced geospatial tools, and rigorous QA/QC protocols, Metric delivers the same outcomes DCR seeks: efficient environmental reviews, defensible records, and timely delivery of recovery services to impacted households.

Example 5	
Client Name:	Louisiana Office of Community Development (OCD)
Program:	HUD CDBG-DR **Period of Performance**: 04/2017 – Present
Brief Description of Services Rendered:	Managing a $4.3 billion CDBG-DR allocation requires precision, speed, and unwavering compliance. Team Guidehouse member **Metric** brings this capability to life through its work on the Restore Louisiana Homeowner Assistance Program, where the mission is clear: help more than 91,000 households recover while maintaining full alignment with HUD regulations and the State Action Plan. Metric's role as the State's trusted agent demonstrates the exact skills and systems DCR seeks—policy development, vendor oversight, fraud prevention, duplication of benefits controls, and construction quality assurance—executed at scale under federal scrutiny. **Policy Development, Grant Management and Program Administration (Task 1,15)** Metric partners with the State of Louisiana to draft and refine HUD-compliant policies and SOPs that govern every stage of the homeowner assistance program. These policies embed federal cross-cutting requirements and provide clear guidance for intake, eligibility, construction, and closeout. Acting as an extension of the State's team, Metric also manages **vendor oversight**, ensuring contractors and service providers adhere to program rules and performance standards. **Compliance, Monitoring, and Risk Management (Tasks 2, 3, 4, and 10)** Metric designs and executes **monitoring protocols** that test compliance with HUD regulations, the Stafford Act, and state contractual obligations. This includes: • **Duplication of Benefits (DOB) controls** to prevent improper payments. • **Fraud, waste, and abuse prevention measures** embedded in workflows. • **Audit readiness tools** that maintain a defensible record for HUD and OIG reviews. The team conducts file audits at eligibility and construction stages, applying risk-based sampling and corrective action tracking to maintain program integrity. Construction Quality Assurance and Technical Oversight (Tasks 4, 6, and 11) Metric manages internal QA/QC processes across multiple construction contractors, using tools like Xactimate to validate damage estimates and confirm that rehabilitation work meets HUD standards, local building codes, and Housing Quality Standards (HQS). This oversight reduces rework, accelerates closeout,

	and safeguards compliance with labor standards and environmental requirements. **Performance Reporting and Stakeholder Transparency (Tasks 8 and 14)** Metric produces detailed compliance and performance reports for the Office of Community Development's Disaster Recovery Unit and other stakeholders. These reports track progress, highlight risks, and document corrective actions, giving leadership the visibility needed to make informed decisions and maintain public trust. **Planning and Long-Term Resilience (Tasks 7 and 12)** Beyond day-to-day operations, Metric supports **forward-looking planning initiatives** that integrate hazard mitigation, affordable housing strategies, and equity-based investment prioritization. Services include: • **GIS mapping and needs assessments** to target resources effectively. • **Stakeholder engagement facilitation** to align recovery with community priorities. • **Integration with land use and capital improvement plans** to strengthen resilience. These efforts position jurisdictions to **secure future funding and translate plans into actionable projects** that advance local goals. **Outcome and Alignment to DCR's Priorities** Metric's work in Louisiana has delivered measurable results: over 91,000 households served, consistent compliance with HUD requirements, and a monitoring framework that withstands federal audits. By combining policy expertise, advanced QA/QC systems, and data-driven oversight, Metric ensures programs move quickly without sacrificing integrity. For DCR, this means immediate access to a partner that can: • Deploy **experienced personnel** across policy, compliance, and technical roles. • Implement **proven monitoring and fraud prevention frameworks**. • Deliver **audit-ready documentation and transparent reporting**. • Support **planning and resilience strategies** that extend beyond recovery.

Example 6	
Client Name:	Florida Division of Emergency Management
Program:	FEMA Public Assistance **Period of Performance**: 10/2017 – 06/2024
Brief Description of Services Rendered:	Managing federally funded recovery programs is a balancing act between speed and accountability. Every reimbursement must be accurate, every file audit-ready, and every dollar defensible under federal scrutiny. Guidehouse has delivered this level of rigor for the Florida Division of Emergency Management (FDEM), supporting financial recovery efforts across multiple counties and disasters, including Hurricanes Irma and Michael. Our work demonstrates the exact capabilities DCR requires: financial compliance, duplication of benefits controls, subrecipient monitoring, and audit readiness—executed across hundreds of projects and millions in federal funds.

	By combining structured monitoring frameworks, technical assistance, and risk-based oversight, Guidehouse helped FDEM accelerate reimbursements, maintain compliance with FEMA and Stafford Act requirements, and close out projects without findings. This experience is directly transferable to North Carolina's CDBG-DR programs, where the same principles—accuracy, transparency, and proactive risk management—are essential for success. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse partnered with FDEM to administer FEMA Public Assistance (PA) grants, overseeing more than $255 million in disaster recovery costs across hundreds of projects and 135 subrecipients. We implemented a structured monitoring process that validated every dollar claimed, achieving 100% cost validation before reimbursement. Our team reviewed contracts, procurement records, and supporting documentation to confirm compliance with 2 CFR 200, Stafford Act provisions, and FEMA PA policy. Key activities included: • **Detailed cost validation** for labor, equipment, and materials. • **Fraud and waste detection protocols** embedded in reimbursement workflows. • **Corrective action tracking** to resolve compliance issues before closeout. **Duplication of Benefits and Risk Mitigation (Task 3)** To protect program integrity, Guidehouse applied DOB controls during reimbursement reviews, cross-referencing insurance proceeds, SBA loans, and other funding sources. This proactive approach reduced the risk of de-obligation and safeguarded federal funds. **Claims, Appeals, and Case Reviews (Task 5)** Our team managed end-to-end reimbursement processing, including review of Project Worksheets, time extension requests, and appeals. We provided technical assistance to subrecipients, helping them navigate eligibility requirements and assemble complete documentation packages for FEMA review. **Program Performance Monitoring and Audit Readiness (Tasks 8 and 10)** Guidehouse established a risk-based monitoring framework that prioritized high-dollar and high-risk projects for early review. We conducted site visits, scope verification, and performance assessments to confirm that work matched approved scopes and that documentation supported claimed costs. These efforts produced audit-ready files for FEMA quarterly reporting and final closeout, reducing exposure to findings and accelerating obligation timelines. Technical Assistance and Capacity Building (Task 12) Beyond compliance, we delivered hands-on training and guidance to local governments and subrecipients, strengthening their ability to manage FEMA PA requirements. This included job aids, process maps, and one-on-one coaching to improve documentation quality and reduce processing delays. **Outcome: A Proven Model for Financial Recovery and Compliance** Guidehouse's work with FDEM resulted in: • **946 projects validated** across eight counties in the Tampa Bay region.

	• **$255.2 million in eligible costs reimbursed** to subrecipients. • **Consistent compliance with FEMA and federal regulations**, confirmed through successful audits and closeouts. By combining financial expertise, structured monitoring, and proactive risk management, Guidehouse delivered a scalable solution that accelerated recovery while maintaining full regulatory alignment. **Outcome and Alignment to DCR's Priorities** The same capabilities that drove success in Florida—cost validation, monitoring frameworks, audit readiness, and technical assistance—are directly transferable to North Carolina's CDBG-DR programs. Our team is prepared to: • Deploy **experienced grants management professionals** to support financial compliance and oversight. • Implement **risk-based monitoring and DOB controls** to protect program integrity. • Deliver **audit-ready documentation and transparent reporting** for HUD and state oversight.

Example 7	
Client Name:	Arizona Department of Emergency and Military Affairs (DEMA)
Program:	FEMA Public Assistance **Period of Performance:** 01/2021 – 11/2022
Brief Description of Services Rendered:	Managing FEMA Public Assistance (PA) funding at scale requires more than processing claims—it demands a structured approach to project formulation, cost validation, and compliance oversight. Guidehouse delivered these capabilities for the State of Arizona, helping the Arizona Department of Emergency and Military Affairs (AZ DEMA) accelerate reimbursements and maintain full alignment with Stafford Act and FEMA PA requirements. Our work demonstrates the exact expertise DCR seeks: program planning, financial compliance, duplication of benefits controls, and technical assistance—executed under tight timelines and federal scrutiny. By combining strategic project management, targeted training, and rigorous documentation control, Guidehouse positioned Arizona to manage and disburse more than $183 million in FEMA PA funding efficiently and transparently. **Program Planning, Policy, and Administrative Support (Task 1)** Guidehouse established a centralized Project Management Team to coordinate efforts among AZ DEMA, FEMA, and subrecipients during the response and recovery phases. We developed project formulation strategies tailored to each subrecipient, aligning with FEMA PA eligibility rules and Arizona's recovery priorities. Our team provided policy interpretation and process guidance, helping state and local stakeholders navigate complex federal requirements. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse implemented expense tracking and reporting protocols that validated costs before submission to FEMA. We reviewed contracts, procurement documentation, and supporting records to confirm compliance

	with 2 CFR 200 and Stafford Act provisions, reducing the risk of de-obligation and audit findings. **Duplication of Benefits and Risk Mitigation (Task 3)** Our team applied DOB controls during project formulation and reimbursement review, cross-referencing insurance proceeds and other funding sources to prevent improper payments and maintain compliance with federal cost principles. **Claims, Appeals, and Case Reviews (Task 5)** Guidehouse managed end-to-end documentation workflows, including eligibility reviews, cost estimate validation, and packaging of approved documentation into FEMA Project Worksheets (PWs). We provided technical assistance to subrecipients, helping them assemble complete and accurate submissions that accelerated FEMA obligation timelines. **Program Performance Monitoring and Audit Readiness (Tasks 8 and 10)** We conducted site visits, scope verification, and performance assessments to confirm that work matched approved scopes and that documentation supported claimed costs. These efforts produced audit-ready files for FEMA quarterly reporting and closeout, strengthening Arizona's compliance posture and reducing exposure to findings. **Training, Technical Assistance, and Capacity Building (Task 12)** Beyond transactional support, Guidehouse delivered specialized training and guidance to AZ DEMA staff and subrecipients, building local capacity to manage FEMA PA requirements. Training covered eligibility rules, documentation standards, and best practices for cost recovery, supported by job aids and process maps for ongoing reference. **Outcome: Proven Results for Large-Scale Recovery Programs** Guidehouse's engagement enabled Arizona to: • **Manage and disburse $183 million in FEMA PA funding** across hundreds of projects. • **Validate 100% of claimed costs** before submission, reducing compliance risk. • **Accelerate reimbursement timelines** through structured project management and technical assistance. By combining financial rigor, operational discipline, and proactive risk management, Guidehouse delivered a scalable solution that advanced recovery while maintaining full regulatory alignment. **Outcome and Alignment to DCR's Priorities** The same capabilities that drove success in Arizona—project formulation, cost validation, monitoring frameworks, and technical assistance—are directly transferable to North Carolina's CDBG-DR programs. Our team is prepared to: • Deploy **experienced grants management professionals** to support financial compliance and oversight. • Implement **risk-based monitoring and DOB controls** to protect program integrity. • Deliver **audit-ready documentation and transparent reporting** for HUD and state oversight.

Example 8	
Client Name:	Vermont Department of Public Safety, Office of Emergency Management
Program:	FEMA Public Assistance and Hazard Mitigation Grant Program **Period of Performance**: 07/2023 – Present
Brief Description of Services Rendered:	Supporting large-scale disaster recovery across multiple federal funding streams requires more than technical knowledge—it demands operational discipline, strategic coordination, and deep familiarity with FEMA and HUD requirements. Guidehouse delivered these capabilities for the State of Vermont following the July 2023 and July 2024 floods, helping the State manage recovery across 90+ high-priority applicants and multiple disasters. Our work demonstrates the exact expertise DCR seeks: grant management, financial compliance, duplication of benefits controls, hazard mitigation planning, and technical assistance—executed under pressure and in partnership with state and federal agencies. By combining structured project management, targeted training, and rigorous documentation control, Guidehouse positioned Vermont to manage and disburse hundreds of millions in federal recovery funding efficiently and transparently. **Program Planning, Policy, and Administrative Support (Task 1)** Guidehouse worked directly with Vermont's Recovery Office to develop and implement project tracking systems, documentation protocols, and FEMA policy guidance. We supported the Agency of Transportation and Department of Buildings and General Services—the State's largest applicants—with tailored SOPs and communication strategies that aligned with FEMA's Public Assistance framework. Our team also managed a statewide applicant support inbox, coordinating cross-agency responses and maintaining up-to-date resources for eligibility and compliance. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse provided high-touch financial oversight across more than 500 reviewed projects totaling $125 million in reimbursements, with another $350 million in progress. We validated costs, reviewed documentation, and supported applicants in preparing audit-ready submissions. Our work helped Vermont maintain compliance with 2 CFR 200 and FEMA PA requirements, reducing risk and accelerating reimbursements. **Duplication of Benefits and Risk Mitigation (Task 3)** Our team applied DOB controls throughout the FEMA PA and Hazard Mitigation processes, cross-referencing insurance proceeds, federal awards, and other funding sources. We supported Vermont in validating eligibility and preventing improper payments, protecting program integrity across multiple disasters. **Claims, Appeals, and Case Reviews (Task 5)** Guidehouse introduced a state-led milestone model that included pre-Exploratory Calls and Damage Inventory Reviews, helping applicants navigate the FEMA PA process more effectively. We met with over 65 applicants prior to FEMA engagement, reviewed damage inventories for 37 applicants, and provided technical assistance to reduce delays and improve documentation quality.

	Program Performance Monitoring and Audit Readiness (Tasks 8 and 10) We supported Vermont's largest applicants with performance tracking, documentation review, and audit preparation. Our team developed monitoring frameworks and compliance tools that enabled the State to maintain transparency and readiness for federal oversight. These efforts strengthened Vermont's audit posture and reduced exposure to findings. **Training, Technical Assistance, and Capacity Building (Task 12)** Guidehouse delivered targeted training and technical assistance to over 90 applicants, including municipalities, state agencies, and non-profits. We provided FEMA PA process guidance, documentation standards, and eligibility support—building local capacity to manage recovery independently and effectively. **Relocation Program and URA Compliance Support (Task 13)** Following the July 2023 floods, Guidehouse helped Vermont stand up a state-managed buyout program. We supported procurement strategy, vendor selection, and URA compliance, alleviating capacity constraints for small towns and enabling equitable property acquisition and relocation. **Communication, Public Information, and Outreach Support (Task 14)** Guidehouse managed Vermont's statewide recovery inbox and coordinated applicant communications across departments. We developed guidance materials, FAQs, and outreach tools to support transparency and accessibility for flood-impacted communities. **Grant Management Across FEMA and HUD Funding Streams (Task 15)** Our team supported Vermont in managing FEMA PA, HMGP, Section 428, and Swift Current funding. We provided end-to-end grant management services—from eligibility screening and project formulation to documentation review and closeout—helping the State maximize reimbursements and reduce cash flow burdens. **Technical Systems Specification and Project Oversight (Task 16)** Guidehouse developed tracking mechanisms and project management tools to support Vermont's recovery operations. We helped the State monitor project progress, validate documentation, and manage applicant workflows across multiple funding streams and disaster declarations. **Environmental Review and Hazard Mitigation Planning (Task 17)** Guidehouse evaluated over 800 hazard mitigation pre-applications totaling $400 million. We provided eligibility screening, feasibility analysis, and benefit-cost analysis (BCA) support. Our team also supported environmental review preparation for HMGP and Swift Current applications, helping Vermont build back more resiliently. **Outcome: Scalable Recovery Support with Proven Results** Guidehouse's engagement enabled Vermont to: • Review and manage over $475 million in FEMA PA and mitigation funding. • Support 90+ applicants across two major disasters with tailored technical assistance. • Accelerate reimbursements and reduce compliance risk through structured project management and documentation control. **Outcome and Alignment to DCR's Priorities**

	The same capabilities that drove success in Vermont—grant management, financial oversight, hazard mitigation planning, and technical assistance—are directly transferable to North Carolina's CDBG-DR programs. Our team is prepared to: • Deploy experienced recovery professionals to support all 17 task areas. • Implement risk-based monitoring and DOB controls to protect program integrity. • Deliver audit-ready documentation and transparent reporting for HUD and state oversight.

Example 9	
Client Name:	Massachusetts Emergency Management Agency (MEMA)
Program:	FEMA Public Assistance **Period of Performance**: 04/2023 – 12/2024
Brief Description of Services Rendered:	With over 900 FEMA Public Assistance (PA) applicants across Massachusetts, the Massachusetts Emergency Management Agency (MEMA) sought a partner capable of managing high-risk, complex projects and maximizing federal reimbursement. Many applicants lacked familiarity with FEMA PA requirements, documentation standards, and eligibility rules. Guidehouse responded by deploying a specialized team to support over 60 applicants and helped facilitate the obligation of approximately $2.6 billion in federal funds. Our work reflects the exact capabilities DCR seeks: grant management, financial compliance, duplication of benefits controls, technical assistance, and documentation oversight—delivered under federal scrutiny and across a high-volume portfolio. **Program Planning, Policy, and Administrative Support (Task 1)** Guidehouse designed and launched a centralized reimbursement and documentation unit on behalf of MEMA. We developed tailored FEMA PA application strategies for each applicant, including state agencies, municipalities, hospitals, and private non-profits. Our team created detailed guidance documents outlining FEMA eligibility criteria, documentation requirements, and submission protocols. We reviewed contracts, invoices, and supporting materials for completeness and regulatory alignment, then assembled and submitted project worksheets (PWs) through the FEMA Grants Portal. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse implemented a structured documentation review process to validate costs prior to FEMA submission. We examined procurement records, financial documentation, and supporting materials to confirm alignment with FEMA PA and 2 CFR 200 requirements. This approach supported accurate reimbursement and reduced exposure to audit findings. **Duplication of Benefits and Risk Mitigation (Task 3)** Our team applied duplication of benefits controls throughout the project lifecycle. We cross-referenced insurance proceeds, federal awards, and other funding sources to prevent improper payments and maintain compliance with federal cost principles.

	Claims, Appeals, and Case Reviews (Task 5) Guidehouse provided technical assistance to applicants throughout the FEMA PA process, including responses to Requests for Information (RFIs) from FEMA and the State. We resolved common application issues and supported applicants in navigating FEMA's "Validate As You Go" (VAYGo) review process, coordinating closely with FEMA and subrecipients to meet documentation standards and address inquiries. **Program Performance Monitoring and Audit Readiness (Tasks 8 and 10)** To support transparency and oversight, Guidehouse developed a secure online document tracking tool with a reporting dashboard. This system provided visibility into applicant costs at the project, applicant, and group levels—enabling MEMA leadership to monitor COVID-19 expenses, projected reimbursements, and obligated amounts. The dashboard tracked over $2.8 billion in costs and more than 450,000 documents, supporting audit readiness and real-time performance monitoring. **Training, Technical Assistance, and Capacity Building (Task 12)** Guidehouse delivered hands-on technical assistance to over 60 applicants, guiding them through FEMA PA documentation and submission processes. We provided individualized support, instructional materials, and troubleshooting assistance to build local capacity and improve application quality. **Outcome: High-Impact Recovery Support Across Hundreds of Projects** Guidehouse's engagement enabled Massachusetts to: • Facilitate the obligation of ~$2.6 billion in FEMA PA funding. • Support over 60 applicants with tailored technical assistance and documentation review. • Track over $2.8 billion in COVID-19 costs and 450,000+ documents through a secure dashboard. • Resolve complex FEMA inquiries and streamline the VAYGo review process. **Outcome and Alignment to DCR's Priorities** The same capabilities that drove success in Massachusetts—project formulation, cost validation, documentation oversight, and technical assistance—are directly applicable to North Carolina's CDBG-DR programs. Guidehouse is prepared to: • Deploy experienced recovery professionals to support all 17 task areas. • Apply risk-based documentation review and DOB controls to protect program integrity. • Deliver structured project management and audit-ready documentation for HUD and state oversight.

Example 10	
Client Name:	North Carolina Clean Energy Fund (NCCEF)
Program:	Greenhouse Gas Reduction Fund – Solar For All **Period of Performance**: 06/2025 – 08/2025

Brief Description of Services Rendered:	Guidehouse supported the North Carolina Clean Energy Fund (NCCEF) in preparing for federal grant administration under the EPA's Greenhouse Gas Reduction Fund (GGRF). This engagement directly aligns with several task areas outlined in the RFP. **Development of Policies, Procedures, and SOPs (Task 1)** Guidehouse conducted a full review of NCCEF's internal controls and operational policies. The team then drafted and implemented updated procedures tailored to federal grant requirements, including documentation standards, workflow protocols, and compliance checklists. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse evaluated NCCEF's financial systems against 2 CFR 200 standards and EPA terms. The team introduced improvements to fund tracking, time and effort documentation, and federal reporting processes, reducing exposure to audit findings and strengthening NCCEF's financial oversight capabilities. **Procurement Compliance and Monitoring (Task 4)** Guidehouse revised NCCEF's procurement policies to align with federal and state regulations. This included developing conflict-of-interest protocols, cost reasonableness documentation, and competitive bidding procedures. These updates positioned NCCEF to conduct federally compliant procurements and maintain transparency in vendor selection. **Audit Readiness and Monitoring Support (Task 10)** Guidehouse helped establish documentation practices and internal review mechanisms that support external audits and federal monitoring visits. **Outcome and Alignment to DCR's Priorities** This engagement demonstrates Guidehouse's ability to translate federal requirements into operational frameworks that meet the expectations of oversight agencies. The outcomes reflect a direct match to the RFP's scope and task categories, and the experience is relevant to the scale and complexity of CDBG-DR program administration.

Example 11	
Client Name:	U.S. Environmental Protection Agency (EPA)
Program:	EPA's Community Change Grants Program **Period of Performance**: 01/2024 – 02/2025
Brief Description of Services Rendered:	With the launch of the EPA's Community Change Grants Program—part of a historic $2 billion federal investment in environmental and climate justice—Greene Street Communications was selected to provide high-impact technical assistance to over 300 organizations nationwide. Many of these applicants were small nonprofits and community-based organizations with limited experience navigating federal grant systems. Greene Street responded by deploying a specialized team to simplify complex federal requirements, deliver individualized coaching, and conduct tailored proposal reviews to help applicants compete for awards ranging from $10 million to $20 million.

	Our work reflects the exact capabilities DCR seeks: program planning, policy development, grant management, technical assistance, and capacity building—delivered under federal scrutiny and across a high-volume portfolio. **Development of Policies, Procedures, and SOPs (Task 1)** Greene Street developed clear, accessible guidance documents to demystify EPA's grant requirements. We translated federal language into actionable steps, created templates for eligibility and benefit calculations, and built SOPs for proposal development workflows. These materials supported consistent application quality across hundreds of organizations. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Our team provided compliance coaching to help applicants understand allowable costs, documentation standards, and risk mitigation strategies. We reviewed budgets and financial narratives to align with EPA expectations and reduce exposure to audit findings. **Duplication of Benefits Compliance (Task 3)** We advised applicants on how to identify and avoid duplication of benefits, particularly in cases involving prior federal or philanthropic funding. Our team developed checklists and review protocols to support accurate benefit calculations and eligibility determinations. **Claims, Appeals, and Case Reviews (Task 5)** Greene Street supported applicants in resolving eligibility questions and refining proposals in response to EPA feedback. We provided one-on-one troubleshooting and helped organizations navigate the federal review process with confidence. **Program Performance Monitoring and Audit Readiness (Tasks 8 and 10)** To support transparency and readiness, Greene Street implemented a centralized tracking system for applicant progress, proposal status, and compliance documentation. This system enabled real-time visibility into application quality and readiness for federal review. **Training, Technical Assistance, and Capacity Building (Task 12)** We delivered hands-on technical assistance to hundreds of organizations, many of which had never applied for federal funding. Our team provided individualized coaching, instructional materials, and proposal review services to build local capacity and improve application competitiveness. **Outcome: Expanding Access to Transformative Federal Funding** Greene Street's engagement enabled over 300 organizations to submit competitive applications for up to $20 million in federal funding. Our work built trust and capacity in underserved communities, helping them access transformative resources to advance environmental and climate justice. **Outcome and Alignment to DCR's Priorities** The same capabilities that drove success in the EPA Community Change Grants Program—policy development, compliance support, technical assistance, and capacity building—are directly applicable to North Carolina's CDBG-DR programs. Greene Street is prepared to: • Support all 17 task areas with experienced grant professionals. • Deliver tailored technical assistance and documentation oversight.

	• Build local capacity through individualized coaching and training. • Promote equitable access to federal recovery funds across impacted communities.

Example 12	
Client Name:	State of Missouri Department of Economic Development
Program:	HUD CDBG-DR **Period of Performance**: 07/2022 – 07/2023
Brief Description of Services Rendered:	Following the federally declared disasters DR-4317 and DR-4451, the Missouri Department of Economic Development (DED) was designated as the grantee for CDBG-DR and CDBG-MIT funds. Facing complex compliance requirements and a need for statewide capacity building, DED selected Guidehouse to lead policy development, program design, and technical assistance efforts—services that directly mirror the task areas outlined by DCR. Our work in Missouri reflects the exact capabilities DCR seeks: policy and SOP development, financial compliance, duplication of benefits controls, training and capacity building, audit readiness, and technical assistance—delivered under HUD oversight and across a diverse portfolio of recovery programs. **Development of Policies, Procedures, and SOPs (Task 1)** Guidehouse conducted a comprehensive gap analysis of Missouri's existing disaster recovery framework, including Action Plans, draft policies, and operational procedures. We authored detailed policies and SOPs for multiple CDBG-DR and CDBG-MIT programs, including: • Affordable Multifamily Rental Recovery • General and Mitigation Infrastructure • Infrastructure in Support of Housing • Homeowner Rehabilitation and Reconstruction • Housing Counseling and Single-Family New Construction Each policy integrated HUD and federal cross-cutting requirements (URA, Davis-Bacon, FLSA, EEO, Section 3, MWBE outreach) and program-specific compliance elements such as eligibility, procurement, cost reasonableness, construction oversight, and closeout protocols. **Financial Compliance, Oversight, and Fraud Prevention (Task 2)** Guidehouse developed financial management protocols to support DED's oversight of subrecipients and contractors. We implemented tools for cost verification, fund tracking, and internal controls aligned with 2 CFR 200. Our work enabled DED to maintain audit readiness and prevent fraud, waste, and abuse across all program areas. **Duplication of Benefits Compliance (Task 3)** Our team established DOB policies and workflows to support eligibility determinations and benefit calculations. We deployed data matching tools and compliance checklists to mitigate risk and maintain alignment with HUD guidance. **Training, Technical Assistance, and Capacity Building (Task 12)**

	Guidehouse delivered tailored training sessions to DED staff and subrecipients, covering: • Program application and eligibility • Monitoring and compliance management • Closeout documentation and audit preparation • Internal controls and regulatory compliance Trainings were delivered live and recorded, with comprehensive materials provided for ongoing reference. These sessions supported onboarding, upskilling, and long-term operational continuity. **Needs Assessment, Performance Monitoring, Civil Rights Compliance, and Relocation Support (Tasks 7, 8, 9, and 13)** Guidehouse conducted a comprehensive needs assessment and gap analysis of DED's existing policies and procedures. This included a review of the State's Action Plans and preliminary policy documents, ensuring that program design was tailored to Missouri's recovery landscape and compliant with HUD and federal requirements. Guidehouse developed detailed monitoring procedures and training modules for both DED staff and CDBG subrecipients. These trainings covered subrecipient compliance management, project closeout documentation, and internal controls, enabling consistent performance tracking and audit readiness throughout the grant lifecycle. Guidehouse's policy development incorporated cross-cutting federal requirements such as the Davis-Bacon Act, Fair Labor Standards Act, Equal Employment Opportunity, and citizen participation. These policies ensured equitable program implementation and compliance with civil rights and labor standards. Guidehouse addressed Uniform Relocation Assistance (URA) requirements within its program-specific policies and procedures. These documents guided DED and its subrecipients in implementing relocation activities in compliance with federal law, ensuring fair treatment of displaced individuals and households. **Audit Readiness and Monitoring Support (Task 10)** We supported DED's audit preparation by developing monitoring tools, readiness checklists, and documentation protocols. Our work positioned the State for successful HUD and federal reviews, with no material findings. **Grant Management and Technical Assistance (Tasks 5, 15)** Guidehouse provided ongoing technical assistance to local governments and counties, helping them administer CDBG-DR and CDBG-MIT funds compliantly. We supported subrecipient contracting, compliance tracking, and project closeout activities—ensuring that local entities could manage funds effectively and meet federal standards. **Outcome: Statewide Compliance and Capacity** Guidehouse's engagement enabled Missouri to: • Achieve full compliance with HUD and 2 CFR 200 requirements • Build internal capacity across state and local agencies • Deliver compliant, audit-ready documentation across all program areas

	• Empower subrecipients to manage funds effectively and transparently **Outcome and Alignment to DCR's Priorities** The same capabilities that drove success in Missouri—policy development, financial oversight, DOB controls, training, and technical assistance—are directly applicable to North Carolina's CDBG-DR programs. Guidehouse is prepared to: • Deploy experienced recovery professionals across all 17 task areas • Deliver structured project management and audit-ready documentation • Build local and state capacity through targeted training and knowledge transfer • Protect public funds through rigorous compliance and risk mitigation

5.0 Required Attachments

5.1 Attachment A: Task Order Categories/Pricing

Proposal Number: Doc1677946894 *Vendor: Guidehouse*

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.

X YES ☐ NO TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)

X YES ☐ NO TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

X YES ☐ NO TASK 3 – Duplication of Benefits (DOB) Compliance

X YES ☐ NO TASK 4 – Procurement Compliance and Monitoring

X YES ☐ NO TASK 5 – Claims, Appeals, and Case Reviews

X YES ☐ NO TASK 6 – Action Plan Development and Amendments

X YES ☐ NO TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support

X YES ☐ NO TASK 8 – Program Performance Monitoring and Evaluation

X YES ☐ NO TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation

X YES ☐ NO TASK 10 – Audit Readiness and Monitoring Support

X YES ☐ NO TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects

X YES ☐ NO TASK 12 – Training, Technical Assistance, and Capacity Building

X YES ☐ NO TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support

X YES ☐ NO TASK 14 – Communication, Public Information, and Outreach Support

X YES ☐ NO TASK 15 – Grant Management

X YES ☐ NO TASK 16 – Technical Systems Specification & Project Management

X 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)			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 3 – Duplication of Benefits (DOB) Compliance			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79

CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 8 – Program Performance Monitoring and Evaluation			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Civil Rights Specialist	$75	$77.25	$79.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 10 – Audit Readiness and Monitoring Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
Financial Compliance Staff	$95	$97.85	$100.79
Financial Compliance Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Engineering Staff	$160	$164.80	$169.74
Engineering Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23

Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 4 – Procurement Compliance and Monitoring			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 5 – Claims, Appeals, and Case Reviews			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Compliance and Monitoring Analyst I	$120	$123.60	$127.31
CDBG-DR Compliance and Monitoring Analyst II	$135	$139.05	$143.22
CDBG-DR Compliance and Monitoring Analyst III	$150	$154.50	$159.14
CDBG-DR Case Reviewer	$45	$46.35	$47.74
CDBG-DR Claims & Appeals Reviewer	$50	$51.50	$53.05
Training and Technical Assistance Staff	$95	$97.85	$100.79
Training and Technical Assistance Manager	$160	$164.80	$169.74
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 6 – Action Plan Development and Amendments			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35

TASK 12 – Training, Technical Assistance, and Capacity Building			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Training and Technical Assistance Staff	$95	$97.85	$100.79
Training and Technical Assistance Manager	$160	$164.80	$169.74
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 14 – Communication, Public Information, and Outreach Support			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Communications Staff	$40		
Communications Manager	$150	$154.50	$159.14
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 15 – Grant Management			
CDBG-DR Admin Support	$70	$72.10	$74.26
CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
CDBG-DR Planning and Policy Staff	$160	$164.80	$169.74
CDBG-DR Planning and Policy Manager	$180	$185.40	$190.96
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
Housing and Homeless Subject Matter Expert	$210	$216.30	$222.79
Federal Grants Management Subject Matter Expert	$210	$216.30	$222.79
Fraud, Waste, and Abuse Prevention Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 16 – Technical Systems Specification & Project Management			
CDBG-DR Admin Support	$70	$72.10	$74.26

CDBG-DR Program Analyst I	$150	$154.50	$159.14
CDBG-DR Program Analyst II	$170	$175.10	$180.35
CDBG-DR Program Analyst III	$190	$195.70	$201.57
Engineering Staff	$160	$164.80	$169.74
Engineering Manager	$190	$195.70	$201.57
CDBG-DR Project Manager	$190	$195.70	$201.57
CDBG-DR Subject Matter Expert	$210	$216.30	$222.79
CDBG-DR Engagement Partner	$250	$257.50	$265.23
TASK 17 – Environmental Review*	**UNIT COST**	**UNIT COST**	**UNIT COST**
Initial Environmental Review:			
Exempt	$968	$860	$860
Categorically Excluded Not Subject to §58.5	$1,505	$1,290	$1,290
Categorically Excluded Subject to §58.5	$16,340	$16,125	$16,125
Environmental Assessment	$33,325	$32,250	$32,250
Environmental Impact Statements	$376,250	$376,250	$376,250
Reevaluation Environmental Review:			
Exempt	$753	$753	$753
Categorically Excluded Not Subject to §58.5	$1,075	$1,075	$1,075
Categorically Excluded Subject to §58.5	$15,050	$15,050	$15,050
Environmental Assessment	$30,100	$30,100	$30,100
Environmental Impact Statements	$268,750	$268,750	$268,750

*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

5.2 Attachment D: Location of Workers Utilized by Vendor

Proposal Number: Doc1677946894 *Vendor: Guidehouse*

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? ☐ YES ☒ NO

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:

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.:

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:

Guidehouse maintains a national footprint with over 50 offices across the United States, including a regional office in Charlotte, North Carolina. The key resources proposed for this engagement are based in North Carolina, Virginia, Washington, D.C., Georgia, Florida, Maryland, Pennsylvania, New York, Missouri, and Mississippi. This broad geographic presence allows Guidehouse to leverage the right expertise for each task area, drawing on both national and regional talent.

For each task order, Guidehouse will prioritize the deployment of local resources to meet DCR's requirements for in-person roles, as specified in the RFP. When in-person performance is required, Guidehouse will assign qualified professionals who are available to work onsite at the designated DCR or project locations. For roles where remote or hybrid work is appropriate, Guidehouse will utilize its extensive network of subject matter experts and support staff across the country to deliver high-quality services and deliverables. By combining our national scope with a commitment to local presence, Guidehouse is positioned to fulfill DCR's needs for both in-person and remote expertise—bringing the right resources to the right locations for every phase of the project.

5.3 Attachment E: HUB Supplemental Vendor Information

Proposal Number: Doc1677946894 *Vendor: Guidehouse*

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**

5.4 Attachment F: Certification for Contracts, Grants, Loans, and Cooperative Agreements

Proposal Number: Doc1677946894 *Vendor: Guidehouse*

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, Guidehouse, 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.

[redacted]

Signature of Vendor's Authorized Official

Matt Davis, Partner

Name and Title of Vendor's Authorized Official

September 4, 2025

Date

5.5 Attachment G: Disclosure of Lobbying Activities

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

Approved by OMB
0348-0046

1. Type of Federal Action:	2. Status of Federal Action:	3. Report Type:
a a. contract b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	a a. bid/offer/application b. initial award c. post-award	a a. initial filing b. material change **For Material Change Only:** year ________ quarter ________ date of last report ____________

4. Name and Address of Reporting Entity:	5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:
☒ Prime ☐ Subawardee Tier ______, *if known* Guidehouse, Inc 1676 International Drive, Suite 800 McLean, VA 22102 **Congressional District**, *if known*: VA-11	N/A **Congressional District**, *if known*: VA-11
6. Federal Department/Agency: U.S. Department of Housing and Urban Devel	**7. Federal Program Name/Description:** Community Development Block Grants/Entitlement G CFDA Number, *if applicable*: 14.218
8. Federal Action Number, *if known*: Unknown	**9. Award Amount,** *if known*: $ 1,428,120,000
10. a. Name and Address of Lobbying Registrant (*if individual, last name, first name, MI*): The Raleigh Group 421 North Harrington Street, Suite 650 Raleigh, NC 27603	**b. Individuals Performing Services** (*including address if different from No. 10a*) (*last name, first name, MI*): Will Morgan John Hardin Sue Ann Swift
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: mrdavis [redacted] Print Name: Matt Davis Title: Partner Telephone No.: (734) 489-6230 Date: 09/11/2025
Federal Use Only:	Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

Guidehouse

State of North Carolina

Department of Commerce–Division of Community Revitalization

Staff Augmentation

Community Development Block Grant-Disaster Recovery Expert Administrative Support

REQUEST FOR PROPOSALS #: DOC1677946894

SEPTEMBER 11, 2025

PROVIDED TO:

State of North Carolina
Division of Community Revitalization
Angie Dunaway
DCR Director of Procurement
Telephone (919) 526-8340
Angela.dunaway@commerce.nc.gov

PROVIDED BY:

Guidehouse Inc.
Matt Davis
Partner
Headquarters: 1676 International Drive, Suite 800 McLean, VA 22102
Telephone: +1 734-489-6230
mrdavis@guidehouse.com

Local Office
101 South Tryon Street, Suite 2700
Charlotte, NC 28280

1.0 Title Page

September 11, 2025

Angela Dunaway
Division of Community Revitalization

Submitted via eProcurement

Subject: Staff Augmentation–Community Development Block Grant Disaster Recover Expert Administrative Support | RFP #: Doc1677946894

Dear Ms. Dunaway and Evaluation Committee:

On behalf of **Guidehouse**, we are pleased to submit our proposal in response to the **State of North Carolina's Request for Proposals #Doc1677946894** for **Staff Augmentation** in support of the **Community Development Block Grant–Disaster Recovery (CDBG-DR)** program. We are honored by the opportunity to partner with the **Division of Community Revitalization (DCR)** as North Carolina advances the critical mission of long-term recovery from **Hurricane Helene**.

Team Guidehouse—comprising of Guidehouse and our trusted partners, **Metric Consulting, LLC** and **Greene Street Communications, LLC**—brings unmatched expertise in **HUD-funded disaster recovery and mitigation programs**, including **CDBG-DR** and **CDBG-MIT**. Our team has successfully supported state and local governments nationwide in the aftermath of major disasters, delivering **policy development, compliance, financial oversight, program monitoring, and capacity building**—the very capabilities outlined in this RFP.

We are committed to working in close collaboration with DCR and local stakeholders to deliver:

- **Qualified, Scalable Personnel**: Guidehouse has deployed more than 100 disaster recovery professionals to support **Harris County's $1 billion CDBG-DR portfolio** after Hurricane Harvey, including policy experts, compliance leads, and case managers. In Florida, we augmented the Department of Economic Opportunity's staff across multiple hurricanes, providing both technical and programmatic support. These experiences demonstrate our ability to **mobilize the right expertise at the right time**—an approach we are ready to bring to North Carolina.
- **Proven Systems for Quality and Compliance**: Guidehouse developed and implemented the full suite of **CDBG-DR policies and procedures** for the City of Joplin, Missouri, following the 2011 tornado. Recognized by HUD as a **national benchmark for disaster recovery design and compliance**, these systems enabled timely delivery, successful audits, and positioned Joplin as a model for other grantees.
- **Flexible, Collaborative Approach**: After Hurricane Sandy, Guidehouse partnered with the State of New York to launch and manage the **NY Rising CDBG-DR program**, adapting policies and delivery models in real time to meet evolving federal guidance and community needs. This approach accelerated housing recovery, expanded outreach to vulnerable populations, and embedded resilience throughout the recovery process.

Communities across the nation—from Harris County to Joplin to New York—have relied on Guidehouse to lead complex disaster recovery efforts. We bring that same depth of experience and commitment to North Carolina, fully prepared to address the State's unique challenges and deliver results that matter.

For us, North Carolina is not just another engagement—it's home. Our team members live and work here, giving us an authentic understanding of local priorities and the resilience of its communities. This connection drives our dedication to supporting DCR in building a recovery that is inclusive, transparent, and future-focused. Our promise is simple: to stand shoulder-to-shoulder with the State in creating a stronger, more resilient North Carolina for every resident.

Thank you for considering our proposal. We look forward to the opportunity to serve the State of North Carolina and contribute to the success of its CDBG-DR recovery mission. Our proposal conforms to the specifications of the RFP and demonstrates that **Team Guidehouse exceeds the State's minimum requirements**. We affirm that neither our firm nor any key personnel have any actual or potential conflicts of interest related to this engagement.

Please contact **Matt Davis, Partner**, our authorized representative, at **(734) 489 - 6230** or **mrdavis@guidehouse.com** with any questions.

Sincerely,

[redacted]

Matt Davis
Partner

2.0 Signed Execution Pages and Addendum

2.1 Signed Execution Page

STATE OF NORTH CAROLINA
Division of Community Revitalization (DCR)

Refer *ALL* Inquiries regarding this RFP to: angela.dunaway@commerce.nc.gov	**Request for Proposals # Doc1677946894**
	Proposals will be publicly opened: September 4, 2025, at 2:00 pm ET
Using Agency: North Carolina Department of Commerce, Division of Community Revitalization	**Commodity No. and Description: 801016 Project management**

EXECUTION

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are offered, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that False certification is a Class I felony and certifies that:

- this proposal is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public Contract; or awarding or administering public Contracts; or inspecting or supervising delivery of the public Contract of any gift from anyone with a Contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this proposal, Vendor certifies that it has read and agreed to the INSTRUCTIONS TO VENDORS and the NORTH CAROLINA GENERAL TERMS AND CONDITIONS. This procurement complies with the State's own procurement laws, rules and procedures per *2 CFR § 200.317*.

Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED. Late proposals shall not be accepted.

COMPLETE/FORMAL NAME OF VENDOR: Guidehouse, Inc			
STREET ADDRESS: 101 South Tryon Street, Suite 2700		P.O. BOX: N/A	ZIP: 28280
CITY & STATE & ZIP: Charlotte, NC 28280		TELEPHONE NUMBER: (734) 489-6230	TOLL FREE TEL. NO: N/A
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE : 1676 International Drive, Ste 800, McLean, VA 22102			
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Matt Davis, Partner		FAX NUMBER: N/A	
VENDOR'S AUTHORIZED SIGNATURE: [redacted]	**DATE:** September 11, 2025	EMAIL: mrdavis@guidehouse.com	

2.2 Signed Addendum 1

NC DEPARTMENT of COMMERCE
COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

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:

1. **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.

2. **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-

			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 *and* a hard copy, or is electronic submission alone sufficient?	Electronic submission alone is sufficient.

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, "*Bid tabulations can be electronically retrieved at the Electronic Vendor Portal (eVP), https://evp.nc.gov*".
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

	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.

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.

		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.

		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.

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.

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

		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.

		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.

		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.

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, *"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."*
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)

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.

		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

	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

		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.

		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.)	eProcurement Sourcing, Section **5.1 VENDOR OFFER**, is where to upload the complete and signed **UNREDACTED** offer. The entire offer should be one (1) pdf file. eProcurement Sourcing, Section **5.3 VENDOR OFFER (REDACTED)**, is where to upload the REDACTED offer.
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?	eProcurement Sourcing, Section **5.2 ATTACHMENT A: PRICING** is where to upload pricing in Excel format. Do not password protect the Excel Price file. 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. Attachment A (RFP page 26) **TASK ORDER CATEGORIES** the vendor should return in pdf 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).
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.

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/directed-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.

		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. DEFAULT AND TERMINATION, 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.

142	Attachment B, VI. BID SUBMISSION, 22. INELIGIBLE VENDORS 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. INELIGIBLE VENDORS 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.

		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	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? • 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.

	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.

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 *level* of the review. However, different project reviews at the *same level* 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.

		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	The section requests technical assistance "including but not limited to civil rights, fair housing, labor standards, and historic preservation." 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. 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?	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, *"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."*

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,

	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.

			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

		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

		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.

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	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." Question: Please confirm the two candidates per position is only applicable to key staff and not all staff listed to support the project.	See response to Question #14, #18, #43, and #49.
203	4.5 Page 16	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" 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.	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: Guidehouse Inc.

AUTHORIZED SIGNATURE: [redacted]

NAME and **TITLE** (Print or Typed): Matt Davis, Partner

DATE: September 11, 2025

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Appendix A. Financial Documentation

Guidehouse meets and exceeds the financial stability and solvency requirements necessary to perform the proposed contract. Our firm has demonstrated its ability to meet short-term obligations, including debts, liabilities, payroll, and operating expenses, without disruption. To further substantiate this, Guidehouse has provided its audited financial statements for the past three fiscal years and our un-audited financial statement for the most recent quarter of operation, which confirm sufficient cash flow and access to institutional financing to support contract performance through reimbursement cycles from the state. Guidehouse has no events, liabilities, or contingent liabilities that could affect our financial ability to perform this contract.

[redacted]

[redacted]

[redacted]

A.3 Guidehouse's disclosure of any events, liabilities, or contingent liabilities that could affect Guidehouse's financial ability to perform this contract

Guidehouse has no events, liabilities, or contingent liabilities that could affect Guidehouse's financial ability to perform this contract.

Appendix B. Key Assumptions

- **Price:** If the information provided by the Client, either in writing or in the RFP, omits or misrepresents any materially relevant facts that would have altered any fixed pricing estimates and/or recommended solutions, Guidehouse reserves the right to renegotiate a revised budget based upon the actual circumstances.
- **Staff:** The ability to staff certain personnel to a project is dependent upon availability at the time of project kickoff. In the event the personnel listed herein become unavailable for any reason, Guidehouse will propose alternate individual(s) of like experience and expertise, such determination shall be made in Guidehouse's reasonable discretion, acceptance by Client shall not to be unreasonably withheld or delayed.
- **Change in Scope:** Please note that changes, including an alteration to the scope or approach, additional meetings, or other changes or delays requested by the Client that would (i) materially increase Guidehouse's level of effort, (ii) include additional business processes, (iii) add unanticipated complexity to the project, (iv) or lengthen the timeline, will likely result in an increase in fees equal to the changes. Guidehouse will work closely with the Client to execute an amendment to the agreement addressing the change in scope and fees.
- **Client Responsibilities:** Client agrees to fulfil data and information requests as soon as possible including providing required documents (a list will be provided) prior to the project start date and as needed throughout the project. Failure to provide the requested data may impact Guidehouse's ability to provide the deliverables and meet the timeline outlined in the Scope and Approach Section. If the Client cannot provide the requested data, Guidehouse will work closely with the Client to execute an amendment to the agreement addressing the change in scope, fees and timeline.
- **Client Resources:** Client shall provide the necessary program managers and or team to work alongside Guidehouse throughout the project. Failure to provide adequate Client resources may result in potential changes to scope, fees and timeline. Guidehouse will work closely with the Client to execute an amendment to the agreement addressing the change in scope, fees and timeline. The information provided by Client to Guidehouse shall be considered "as is" and Guidehouse will not validate or confirm the accuracy of the data and information provided.
- **Acceptance:** Subject to any acceptance language or procedures in the agreement to the contrary, draft deliverables will be provided to the Client according to the timelines agreed in the proposal or as may be revised and agreed to. Client will conduct review and provide feedback over a period of three business days. Client will have two (2) business days to complete final review and acceptance of final deliverables. If no comments or decision on acceptance or rejection is received within five (5) business days, the deliverable will be deemed accepted.

Appendix C. Guidehouse Disclosure

In May 2024, Guidehouse settled a False Claims Act suit with the U.S. Department of Justice and a qui tam relator related to the New York State Emergency Rental Assistance Program (ERAP). Guidehouse specifically disclaimed any liability in connection with the settlement and rejects any assertion that its actions under the relevant agreement amounted to a breach of contract or a false claim. More information about the settlement is available here: Guidehouse Settlement. Guidehouse welcomes any questions the agency may have concerning this settlement.

Conflict of Interest Disclosure:

Based on Guidehouse's conflict check procedures, Guidehouse is not aware of any circumstances that would constitute a conflict of interest or that would otherwise impair Guidehouse's ability to provide objective assistance to Client under this engagement. Guidehouse's determination of conflicts is based primarily on the substance of its work and not the parties involved. Guidehouse is a large consulting company that is engaged by many companies and individuals, both governmental and commercial. Guidehouse may have in the past represented, may currently represent or may in the future represent other clients whose interests may have been, may currently be or may become adverse to the Client in litigation, transactions, or other matters (collectively "Other Clients"). Therefore as a condition to Guidehouse's undertaking to provide the services contemplated herein to the Client, the Client agrees that Guidehouse may continue to represent, and in the future may represent Other Clients; provided however that Guidehouse agrees that it will not accept retentions by Other Clients that would be materially adverse to the Client in the same legal proceeding on the factual matters that are the subject matter of an engagement set forth under the applicable agreement.

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