

Contract Award

Contract Number:	Doc1677946894
Contract Description:	Staff Augmentation
Vendor:	CohnReznick

Task Order Categories Awarded:

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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

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

TASK 10 – Audit Readiness and Monitoring Support

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

TASK 12 – Training, Technical Assistance, and Capacity Building

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

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

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

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

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

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

COMPLETE/FORMAL NAME OF VENDOR: CohnReznick LLP		
STREET ADDRESS: 525 North Tryon Street, Suite 800	P.O. BOX: N/A	ZIP: N/A
CITY & STATE & ZIP: Charlotte, NC 28202	TELEPHONE NUMBER: 301-280-1856	TOLL FREE TEL. NO: 301-280-1856
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE : N/A		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Frank Banda, Managing Partner, Government and Public Sector Advisory Practice		FAX NUMBER: 301-280-2749
VENDOR’S AUTHORIZED SIGNATURE: 	DATE: December, 11, 2025	EMAIL: Frank.Banda@CohnReznick.com

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

ACCEPTANCE OF OFFER:

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

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

REQUEST FOR BEST AND FINAL OFFER (BAFO):

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

Vendor's Errata and Exceptions

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

☒ **YES**, Vendor acknowledges and agrees to the above statement.

☐ **NO**, Vendor does not acknowledge or agree to the above statement.

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



NC DEPARTMENT
of COMMERCE
COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

Request for Offer Extension

Solicitation Number: Doc1677946894

Solicitation Description: Staff Augmentation

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

Issue Date Request for Offer Extension: December 5, 2025

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

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

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

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

☒ **YES**, Vendor acknowledges and agrees to extend its offer thirty (30) calendar days.

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

Sign Request for Offer Extension:

Offer (Vendor Name): CohnReznick LLP

Authorized Signature: 

Name and Title: Frank Banda, Managing Partner Govt and Public Sector

Date: 12/5/2025

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Data Manager	\$ 220.00	\$ 227.00	\$ 233.00
Reporting Specialist	\$ 185.00	\$ 191.00	\$ 196.00
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00

Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 10 – Audit Readiness and Monitoring Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Civil Engineer V	\$ 306.00	\$ 315.00	\$ 325.00
Civil Engineer III	\$ 215.00	\$ 222.00	\$ 228.00
Field Technician III	\$ 228.00	\$ 235.00	\$ 242.00
Field Supervisor II	\$ 254.00	\$ 262.00	\$ 270.00
Field Technician III	\$ 202.00	\$ 208.00	\$ 214.00
Field Technician II	\$ 150.00	\$ 155.00	\$ 159.00
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Graphic Designer	\$ 188.50	\$ 194.00	\$ 200.00
Communications Manager	\$ 220.00	\$ 227.00	\$ 234.00
Outreach Specialist	\$ 227.50	\$ 234.00	\$ 241.00
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00

TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
Project Lead	\$ 250.00	\$ 258.00	\$ 265.00
Senior Grant Manager	\$ 220.00	\$ 227.00	\$ 233.00
Grant Manager	\$ 190.00	\$ 196.00	\$ 202.00
Junior Grant Manager	\$ 170.00	\$ 175.00	\$ 180.00
Compliance Coordinator	\$ 155.00	\$ 160.00	\$ 164.00
TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt	\$ 1,170.00	\$ 1,170.00	\$ 1,170.00
Categorically Excluded Not Subject to §58.5	\$ 1,820.00	\$ 1,820.00	\$ 1,820.00
Categorically Excluded Subject to §58.5	\$ 19,760.00	\$ 19,760.00	\$ 19,760.00
Environmental Assessment	\$ 40,300.00	\$ 40,300.00	\$ 40,300.00
Environmental Impact Statements	\$ 420,000.00	\$ 420,000.00	\$ 420,000.00
Reevaluation Environmental Review:			
Exempt	\$ 910.00	\$ 910.00	\$ 910.00
Categorically Excluded Not Subject to §58.5	\$ 1,300.00	\$ 1,300.00	\$ 1,300.00
Categorically Excluded Subject to §58.5	\$ 18,200.00	\$ 18,200.00	\$ 18,200.00
Environmental Assessment	\$ 36,400.00	\$ 36,400.00	\$ 36,400.00
Environmental Impact Statements	\$ 300,000.00	\$ 300,000.00	\$ 300,000.00
*The CohnReznick team has identified assumptions related to the environmental unit cost. Regarding cultural resources, we assume the State Historic Preservation Officer (SHPO), upon notification of the project, returns a letter stating there are no anticipated impacts to historic and archaeological resources. The unit cost pricing does not include a Cultural Resources Assessment Survey (CRAS) or Section 106 Consultation with SHPO. The unit costs assume the project will not impact potential habitat for listed species and do not include related Section 7 or Section 10 Consultation. Basic habitat evaluations will be conducted but no surveys for listed species are included in the cost proposal and no in-water surveys are included. The unit costs cover the production of an Environmental Review Record but do not include the costs of concept development, project descriptions or engineering. Costs assume that contamination information will be readily accessible in public databases and that initial Phase I level contamination investigations yield a finding of No Recognized Environmental Conditions. The unit costs do not include a Phase II Environmental Site Assessment for contamination. The unit costs assume all data will be available in public databases and proprietary data will not need to be purchased to complete ERRs. The unit costs for Environmental Impact Statements (EIS) and Environmental Assessments (EAs) do not include public meetings, public involvement or detailed socioeconomic studies.			

Staff Augmentation

Community Development Block Grant-Disaster Recovery

Expert Administrative Support

North Carolina

Department of Commerce – Division
of Community Revitalization

**REDACTED
COPY**

Authorized contact

Frank Banda

Managing Partner, CohnReznick Government
and Public Sector Advisory
frank.banda@cohnreznick.com
301-280-1856

RFP#: Doc1677946894

CohnReznick LLP

600 South Tryon Street, Suite 1925, Charlotte,
NC 28202

CohnReznick confirms that there are no actual or potential conflicts of interest involving CohnReznick or its key personnel. This statement is made after due diligence and internal review to confirm compliance with the disclosure requirement.

This has been prepared for information purposes and general guidance only and does not constitute legal or professional advice. You should not act upon the information contained in this publication without obtaining specific professional advice. No representation or warranty (express or implied) is made as to the accuracy or completeness of the information contained in this publication, and CohnReznick, its partners, employees and agents accept no liability, and disclaim all responsibility, for the consequences of you or anyone else acting, or refraining to act, in reliance on the information contained in this publication or for any decision based on it.

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01

Signed Offer and Amendments

North Carolina

Department of Commerce – Division of
Community Revitalization

Staff Augmentation

Community Development
Block Grant-Disaster
Recovery
Expert Administrative Support

Request for Proposals #: Doc1677946894





1. Signed Offer and Attachments



STATE OF NORTH CAROLINA DEPARTMENT OF COMMERCE

Division of Community Revitalization

Request for Proposals #: Doc1677946894

Staff Augmentation

Community Development Block Grant-Disaster Recovery Expert Administrative Support

Date of Issue: August 11, 2025

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

Direct all inquiries concerning this RFP to:

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



Proposal Number: Doc1677946894

Vendor: CohnReznick LLP

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Proposal Number: Doc1677946894

Vendor: CohnReznick LLP

1.0 PURPOSE AND BACKGROUND – AGENCY SPECIFIC TERM CONTRACT

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

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

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

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

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

1.1 CONTRACT TERM

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

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



Proposal Number: Doc1677946894

Vendor: CohnReznick LLP

2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSALS AND TASK ORDERS

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

2.2 ePROCUREMENT FEE

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

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

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

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

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

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



Proposal Number: Doc1677946894

Vendor: CohnReznick LLP

2.4 RFP SCHEDULE

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

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

2.5 RFP QUESTIONS

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

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

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

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

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

2.6 RFP SUBMITTAL

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



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Offers to be submitted through eProcurement Sourcing. 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.

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

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

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

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

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

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

2.7 PROPOSAL CONTENTS

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

All pages of the RFP should be returned.

Proposal shall include the following components:

1. Title Page

The title page shall include:

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



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

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

3. **Table of Contents**

4. **Narrative Response: Vendor Qualifications and Approach**

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

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

5. **Resumes and Bios**

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

6. **Examples**

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

2.8 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

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

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



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

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

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

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



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

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

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

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

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

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

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

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

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

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

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

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



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

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

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

3.4 EVALUATION CRITERIA

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

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

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

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



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

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

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

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

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

3.6 INTERPRETATION OF TERMS AND PHRASES

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

4.0 REQUIREMENTS

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

4.1 TASK ORDER CATEGORIES

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



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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

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

TASK 10 – Audit Readiness and Monitoring Support

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

TASK 12 – Training, Technical Assistance, and Capacity Building

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

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

4.2 PRICING

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

4.3 PAYMENT STRUCTURE

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

4.4 INVOICES

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

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

4.5 HUB PARTICIPATION

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

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

4.6 BACKGROUND CHECKS

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

4.7 PERSONNEL

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

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

4.8 VENDOR'S REPRESENTATIONS

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

4.9 INSURANCE REQUIREMENTS

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

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



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

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

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

4.11 FINANCIAL INFORMATION

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

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

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

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

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

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



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5.0 SCOPE OF WORK

5.1 GENERAL

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

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

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

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

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

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

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

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



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5.2 TASKS / DELIVERABLES

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

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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



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5.2.3 TASK 3 – Duplication of Benefits (DOB) Compliance

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

Anticipated Deliverables:

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

5.2.4 TASK 4 – Procurement Compliance and Monitoring

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

Anticipated Deliverables:

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

5.2.5 TASK 5 – Claims, Appeals, and Case Reviews

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

Anticipated Deliverables:

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

5.2.6 TASK 6 – Action Plan Development and Amendments

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

Anticipated Deliverables:

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



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

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

Anticipated Deliverables:

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

5.2.8 TASK 8 – Program Performance Monitoring and Evaluation

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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



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5.2.10 TASK 10 – Audit Readiness and Monitoring Support

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

- Relocation policies, procedures, SOPs, and workflows



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

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

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

Anticipated Deliverables:

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

5.2.15 TASK 15 – Grant Management

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

Anticipated Deliverables:

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

5.2.16 TASK 16 – Technical Systems Specification & Project Management

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

Anticipated Deliverables:

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



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Vendor: CohnReznick LLP**5.2.17 TASK 17 – Environmental Review**

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

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

Additionally, the selected Vendor(s) must provide a reevaluation cost for each of the aforementioned environmental review levels.

Anticipated Deliverables

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

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

5.3 TASK ORDER METHODOLOGY

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

5.4 TRANSITION ASSISTANCE

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



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6.0 CONTRACT ADMINISTRATION

6.1 PROJECT MANAGER AND CUSTOMER SERVICE

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

6.2 PERFORMANCE

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

6.3 DISPUTE RESOLUTION

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

6.4 CONTRACT CHANGES

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



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Vendor: CohnReznick LLP

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

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

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



Pricing

*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***

Per DCR's response to Question #126 in Addendum 1, CohnReznick has uploaded our Section 5.2 Attachment A: Pricing in Excel format to the Ariba portal, as instructed. The Excel file replicates the format shown in Attachment A (RFP page 26) and is not password protected.

Additionally, our selected Task Order Categories have been returned in PDF format on the previous page and are included as part of our complete Vendor Offer uploaded in Section 5.1, in accordance with the RFP requirements.



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PRICING:

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

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



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

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

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



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Vendor: CohnReznick LLP**ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS****I. READ, REVIEW AND COMPLY**

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

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

II. REQUEST FOR OFFERS

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

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

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

III. DUTY TO INQUIRE

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

IV. DEFINITIONS, ACRONYMS AND ABBREVIATIONS

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

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

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



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

V. INTERPRETATION OF TERMS AND PHRASES

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

VI. BID SUBMISSION

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



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

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

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

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

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

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

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

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

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

8. **CONTENTS OF OFFER:**

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



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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

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

- a) any company identified as engaging in investment activities in Iran, as determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, and
- b) any company identified as engaged in a boycott of Israel as determined by appearing on the List of restricted companies created by the State Treasurer pursuant to G.S. 147-86.81. A contract with the State or any of its political subdivisions by any company identified in a) or b) above shall be void *ab initio*.

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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



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

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

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



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Vendor: CohnReznick LLP**ATTACHMENT C: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS****1. PERFORMANCE:**

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

2. DEFAULT AND TERMINATION.

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



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

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

3. INTERPRETATION, CONFLICT OF TERMS.

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



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

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

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

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

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

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

7. SITUS AND GOVERNING LAWS:

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

8. NON-DISCRIMINATION COMPLIANCE:

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



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

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

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

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

10. **CONDITION AND PACKAGING:** Unless otherwise expressly provided by special terms and conditions or specifications in the Contract or by express, specific federal law or rule, it is understood and agreed that any item offered or shipped has not been sold or used for any purpose, is newly manufactured, and shall be in first class condition. All containers/packaging shall be suitable for handling, storage or shipment.
11. **INTELLECTUAL PROPERTY WARRANTY AND INDEMNITY:** Vendor shall hold and save the State, its officers, agents and employees, harmless from liability of any kind, including costs and expenses, resulting from infringement of the rights of any third party in any Services or copyrighted material, patented or patent-pending invention, article, device or appliance delivered in connection with the Contract.

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



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

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

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

13. ACCESS TO PERSONS AND RECORDS:

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



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v. Access and review

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

14. ASSIGNMENT OR DELEGATION OF DUTIES.

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

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

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



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

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

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

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

1. **For Small Purchases** as defined under North Carolina Administrative Code 01 NCAC 05A.0112 (35) and 05B.0301 (1), the minimum applicable insurance requirements for Worker's Compensation and Automobile Liability will apply as required by North Carolina law. The Purchasing Agency may require Commercial General Liability coverage consistent with the assessed risks involved in the procurement.
2. **For Contracts valued in excess of the Small Purchase threshold, but up to \$1,000,000.00 the following limits shall apply:**
 - i. **Worker's Compensation** - The Vendor shall provide and maintain Worker's Compensation Insurance, as may be required by the laws of North Carolina, as well as employer's liability coverage, with minimum limits of \$250,000.00, covering all of Vendor's employees who are engaged in any work under the Contract in North Carolina. If any work is sub-Contracted, the Vendor shall require the sub-contractor to provide the same coverage for any of its employees engaged in any work under the Contract within the State.
 - ii. **Commercial General Liability** - General Liability Coverage on a Comprehensive Broad Form on an occurrence basis in the minimum amount of \$500,000.00 Combined Single Limit. Defense costs shall be in excess of the limit of liability.
 - iii. **Automobile** - Automobile Liability Insurance, to include liability coverage covering all owned, hired and non-owned vehicles, used within North Carolina in connection with the Contract. The minimum combined single limit shall be \$250,000 bodily injury and property damage; \$250,000 uninsured/under insured motorist; and \$2,500 medical payment.
3. **For Contracts valued in excess of \$1,000,000 the following limits shall apply:**
 - i. **Worker's Compensation** - The Vendor shall provide and maintain Worker's Compensation Insurance, as may be required by the laws of North Carolina, as well as employer's liability



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

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

16. **GENERAL INDEMNITY:**

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

17. **ELECTRONIC PROCUREMENT:**

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



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

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

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

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

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

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

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



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

27. FEDERAL FUNDS PROVISIONS

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

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

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



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- c) **Remedies and Termination**, For purposes of this section the State Remedies and Termination provisions above apply as written.

- d) **Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).**

Compliance with the Contract Work Hours and Safety Standards Act.

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

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

Clean Air Act

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

Federal Water Pollution Control Act

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

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

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

f) Debarment and Suspension.

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

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

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

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

h) Procurement of Recovered Materials.

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



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



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

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

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

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

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

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

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

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Vendor: CohnReznick LLP**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



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

Signature of Vendor's Authorized Official

Frank Banda, Managing Partner, Government and Public Sector Advisory Practice

Name and Title of Vendor's Authorized Official

August 26, 2025

Date



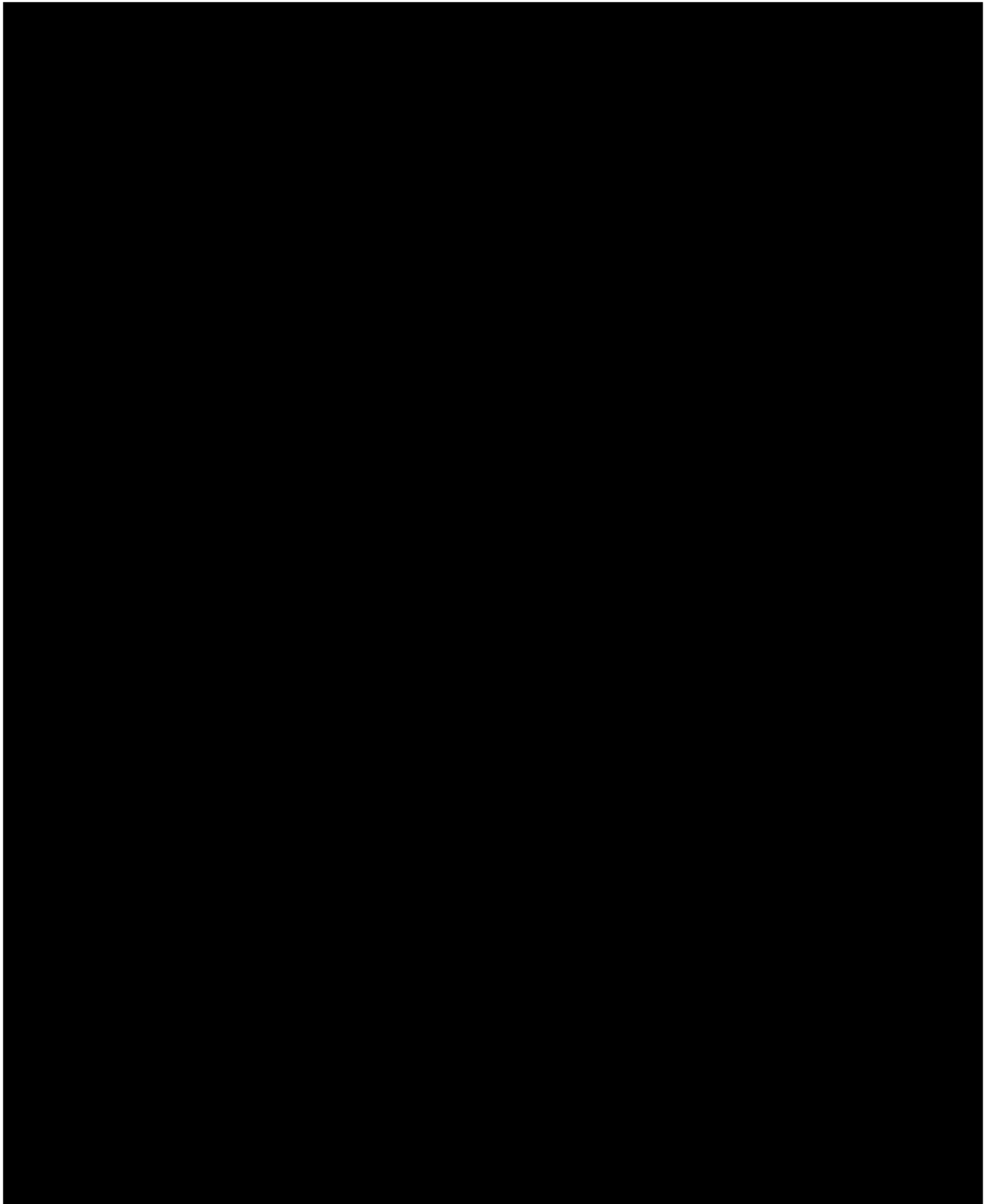
Proposal Number: Doc1677946894

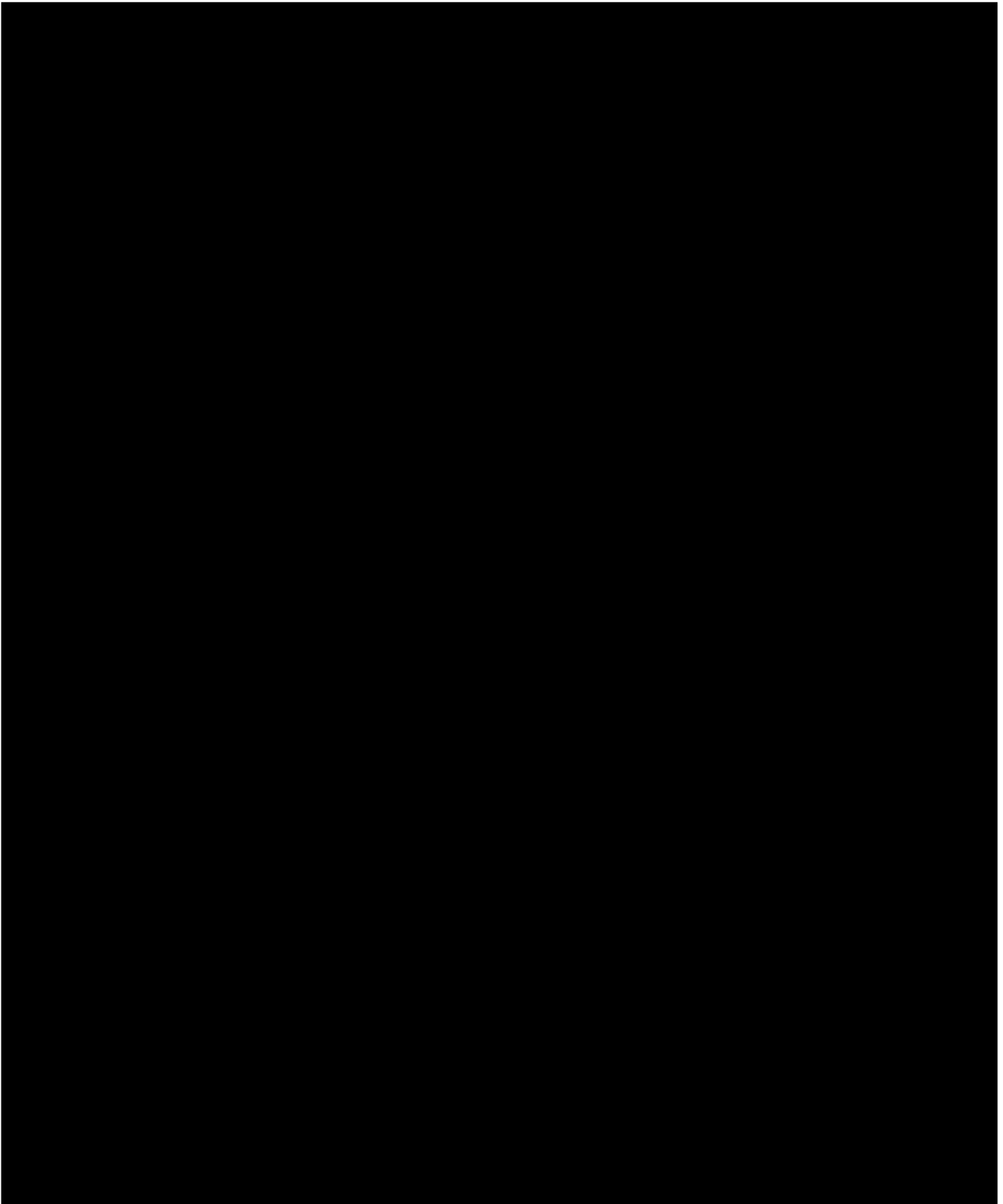
Vendor: CohnReznick LLP

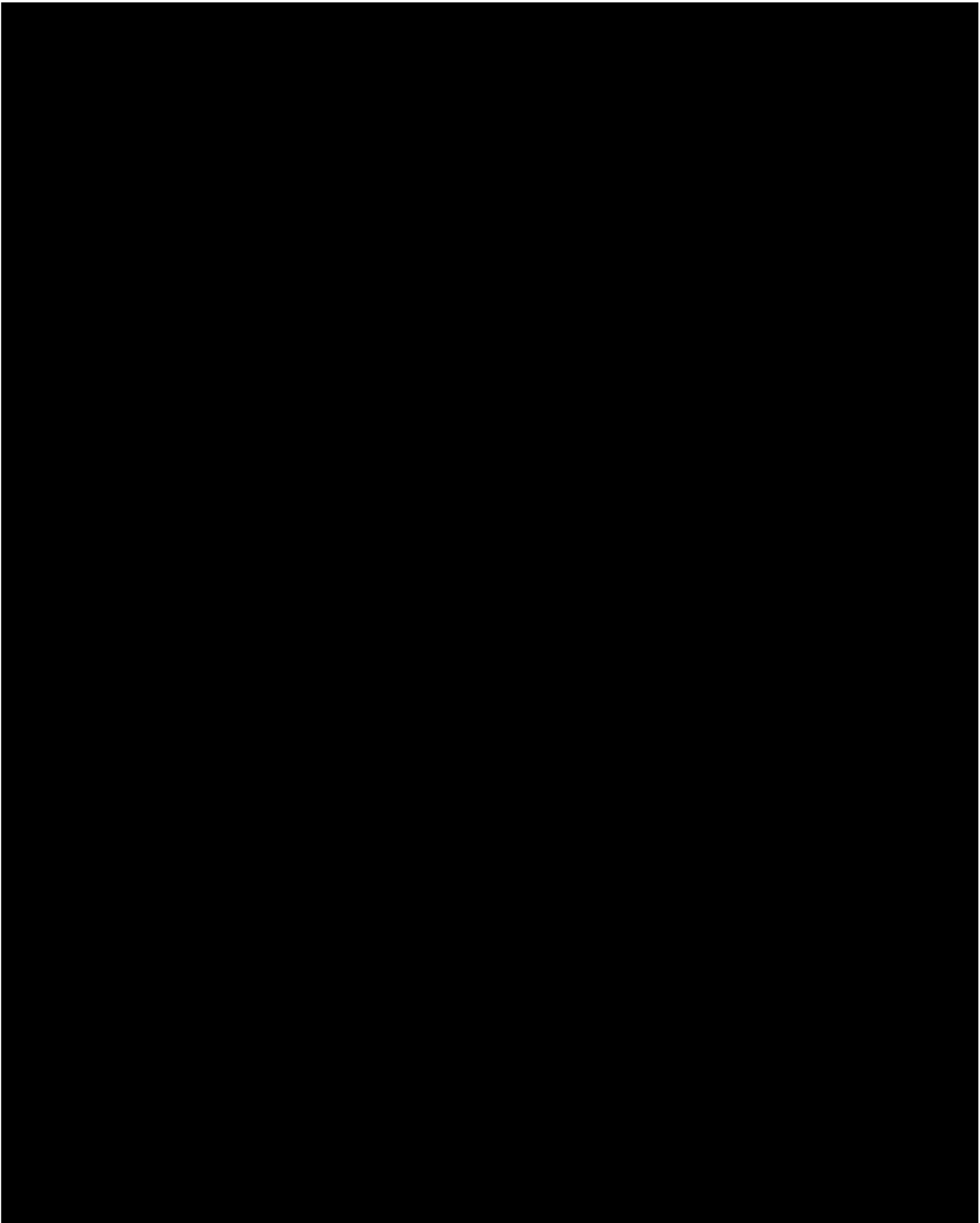
ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

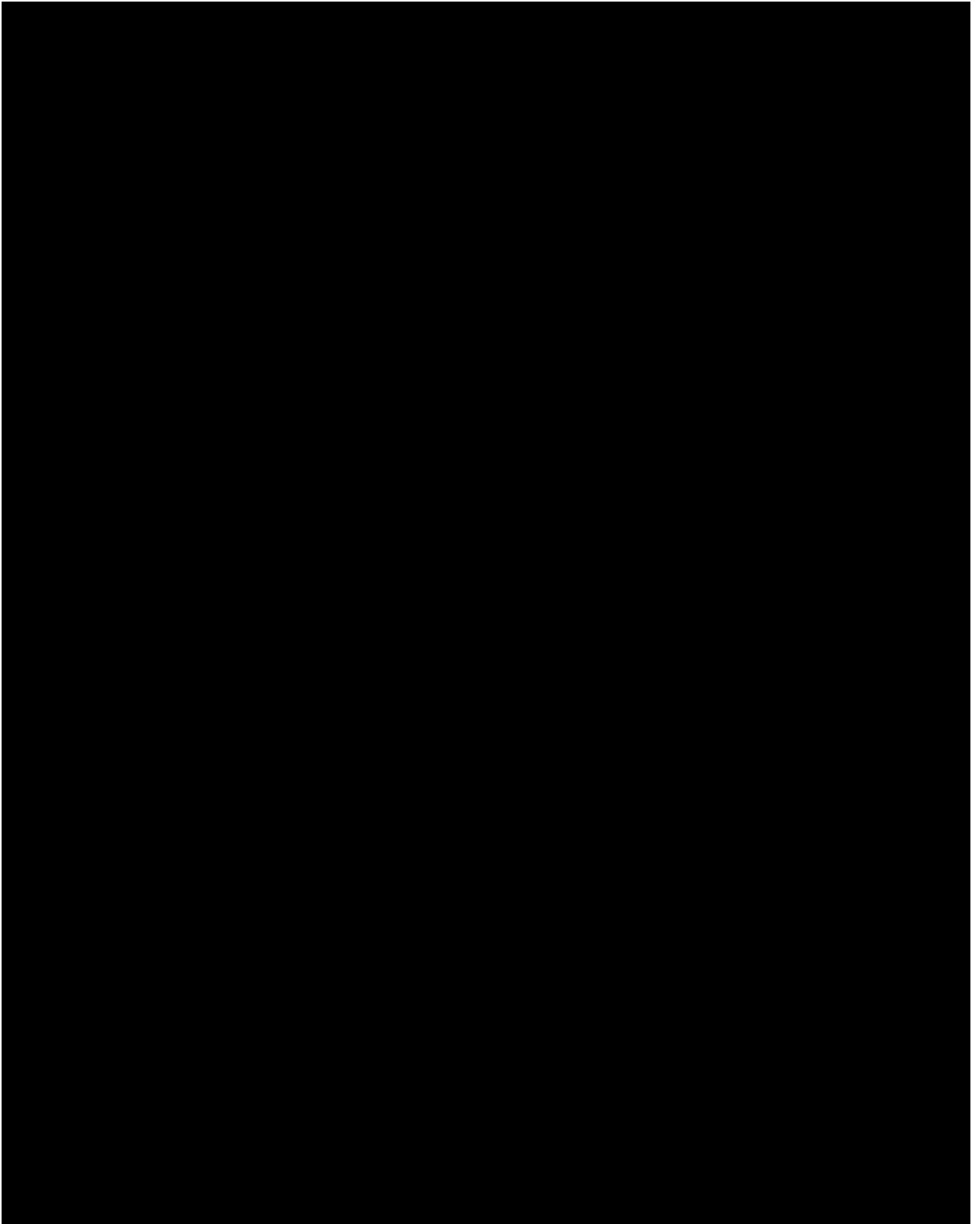
The Disclosure of Lobbying Activities form, is located at <https://www.doa.nc.gov/pandc/onlineforms/pc-omb-standard-form-III-72020-pdf/open>. If applicable, download and attach the completed form with Vendor's response to this Solicitation.

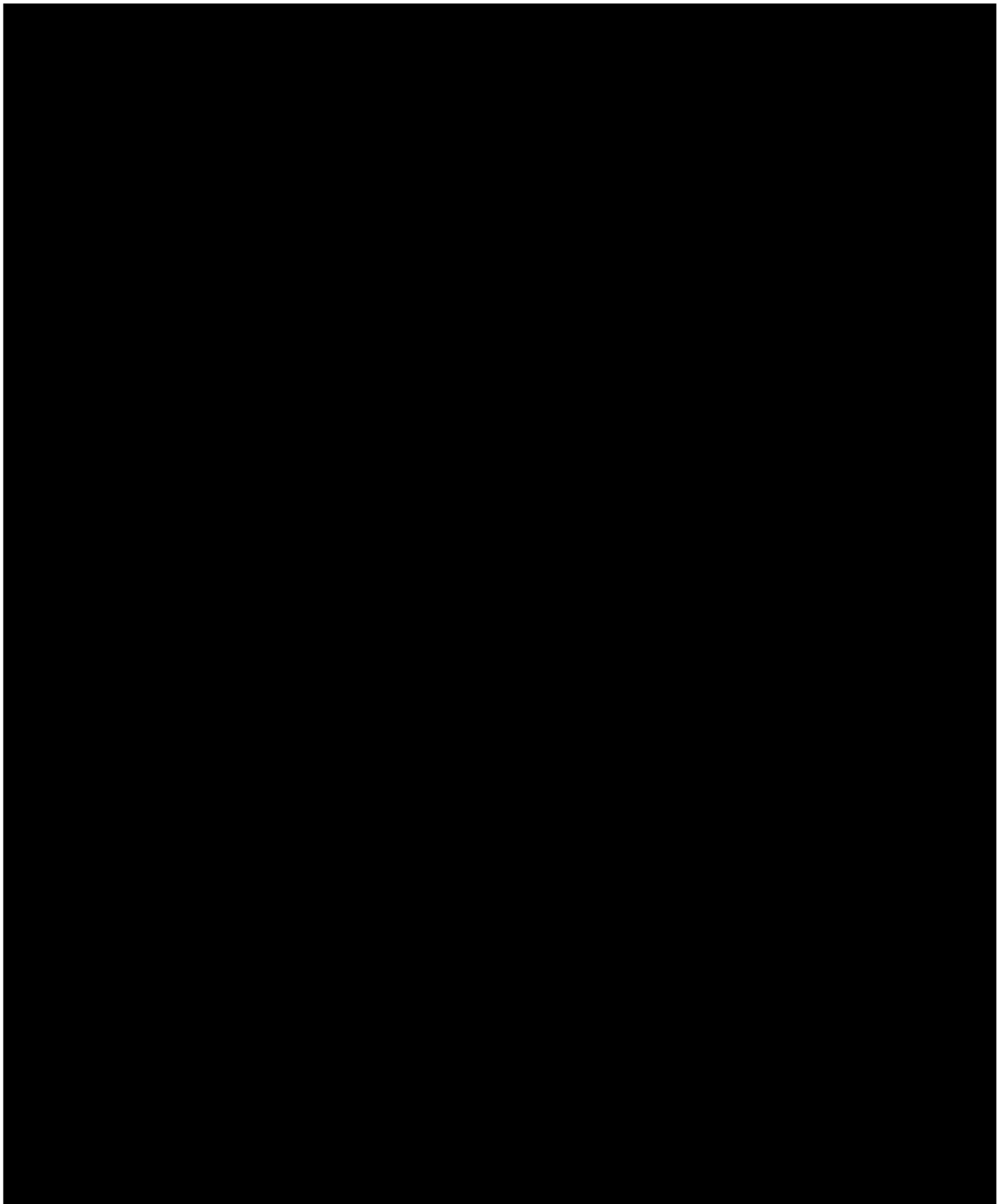
Not applicable to CohnReznick.

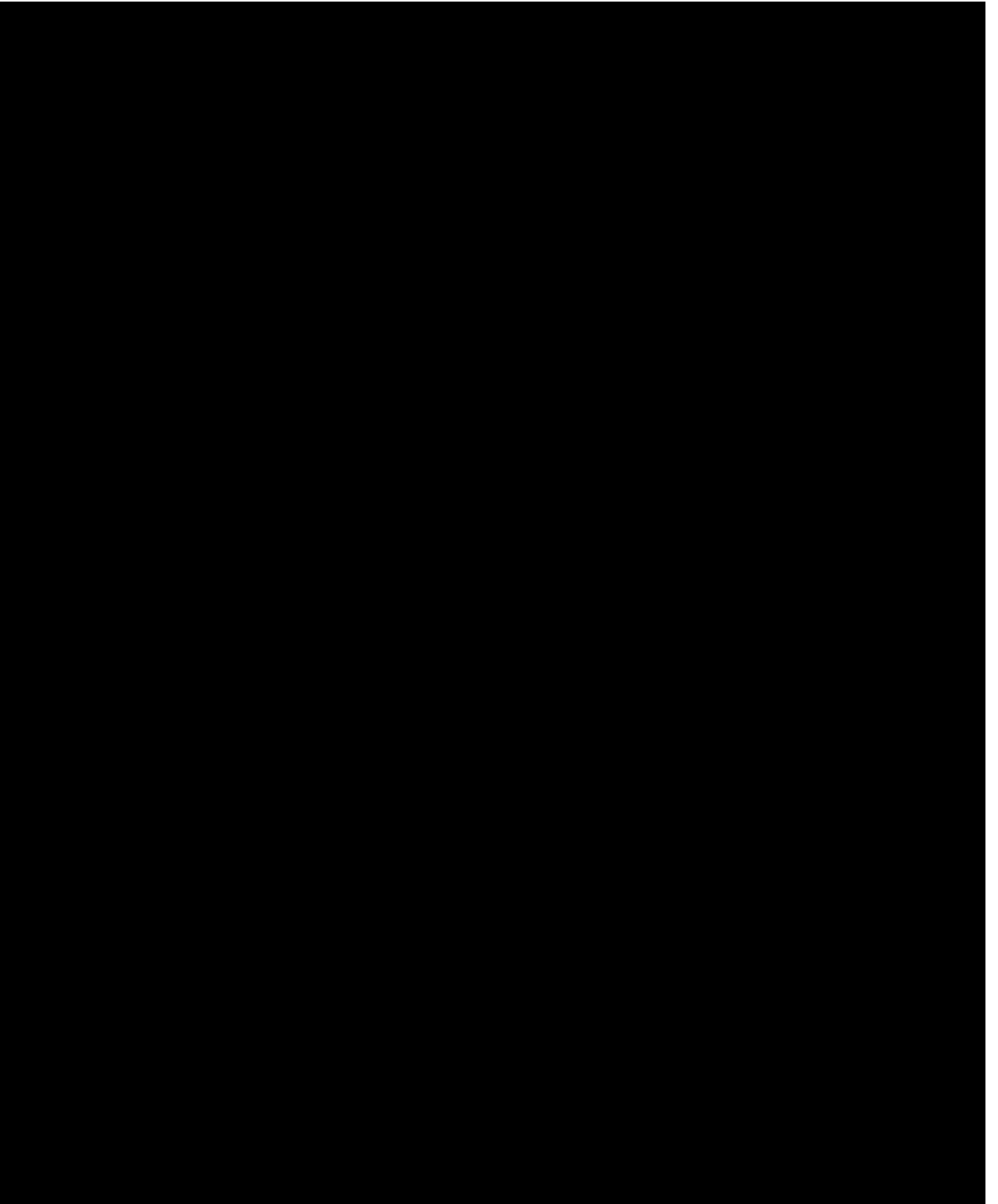


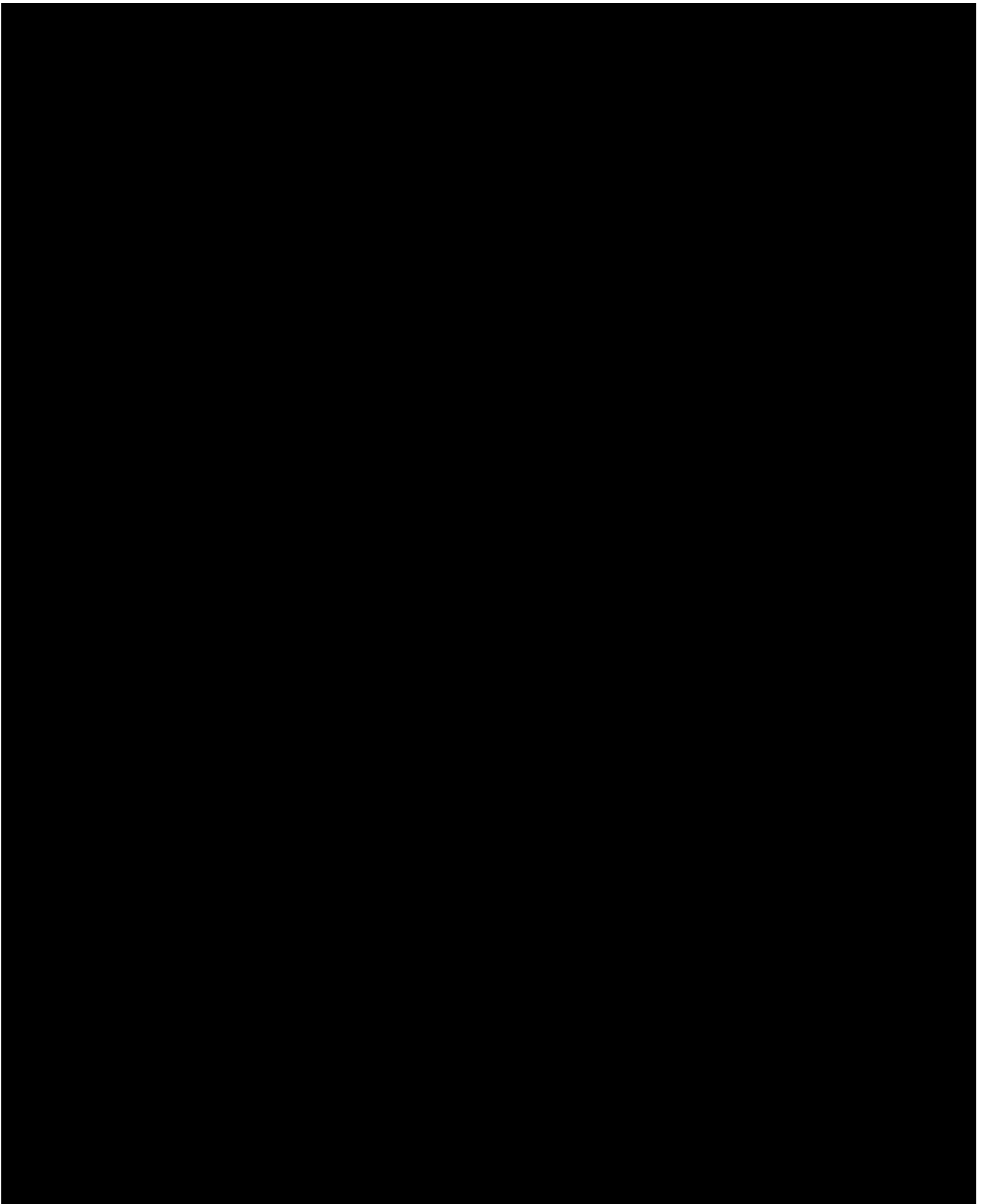


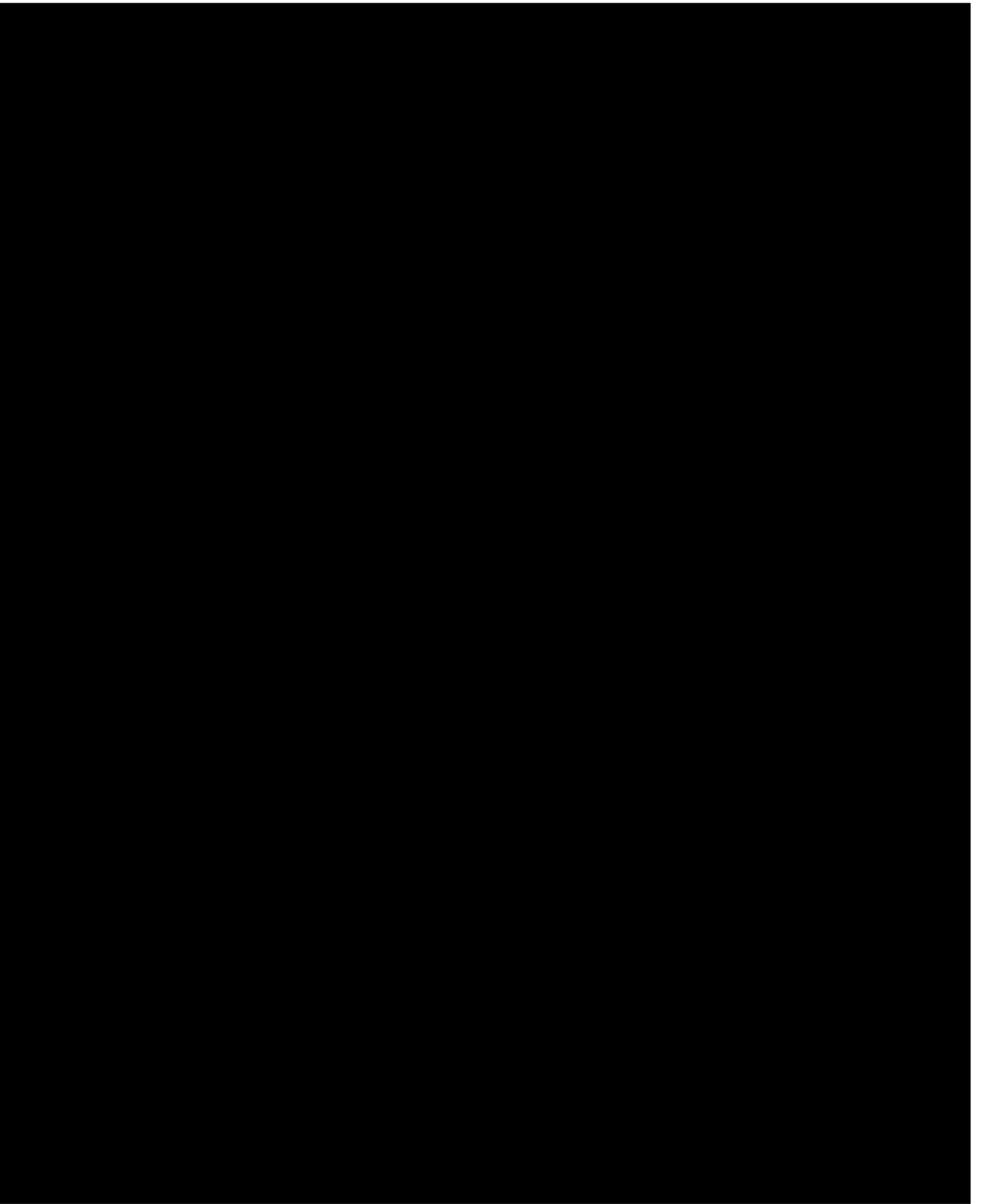














Proposal Number: Doc1677946894

Vendor: CohnReznick LLP

OFFER CHECKLIST

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

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

Offer Checklist:

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

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

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

02

Signed Addenda

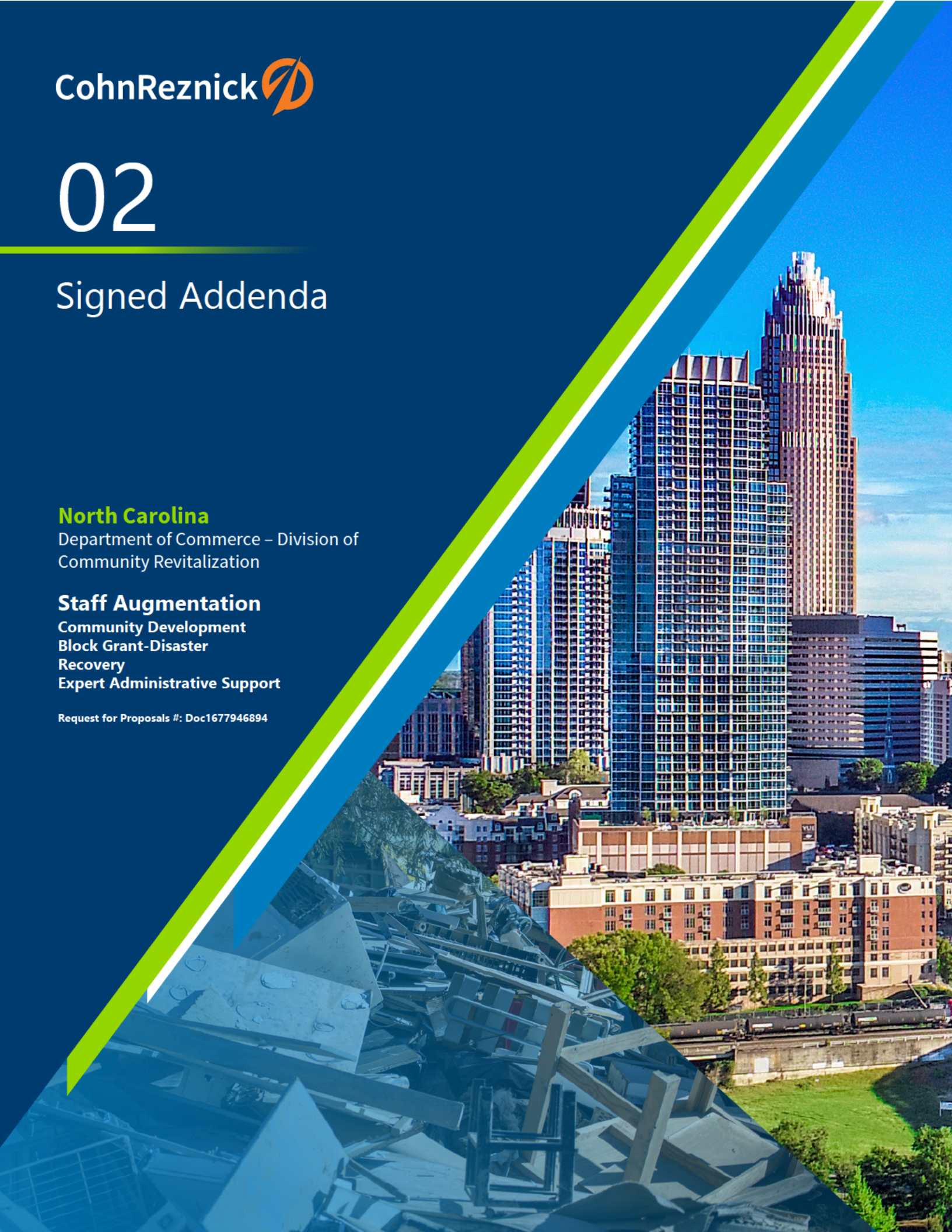
North Carolina

Department of Commerce – Division of
Community Revitalization

Staff Augmentation

Community Development
Block Grant-Disaster
Recovery
Expert Administrative Support

Request for Proposals #: Doc1677946894





2. Signed Addenda



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



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 <u>signed UNREDACTED</u> offer. The <u>entire offer</u> 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 <u>pricing</u> in <u>Excel</u> 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 <u>pdf</u> format. The TASK ORDER CATEGORIES selected by the Vendor should be included in the entire Vendor offer uploaded in Section 5.1 VENDOR OFFER (unredacted).
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/direct-ed-grants-w-9-form/open . For General Instructions, please refer to the IRS Form W-9 located on the IRS Website (https://www.irs.gov/)
134	Section 4.3, Payment Structure Page 15	The RFP states “Payment will be a fixed fee for services based on the scope of work for each task order,” however the state is only requesting not to exceed labor rates (other than for the environmental unit tasks). Please confirm offerors will be able to invoice the state based on the	See clarification at the top of this addendum: Payment will be a NOT-TO-EXCEED amount for services based on the scope of work for each task order.



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



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



		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 Task 16 – 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 <i>level</i> of the review. However, different project reviews at the <i>same level</i> may have significantly different costs associated with them based on site-specific conditions requiring additional assessment/studies (e.g. Phase I	Vendors are welcome to provide any project assumptions along with their cost estimates however project costs must be sufficient to include any information necessary for a compliant NEPA review.



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



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 activated, 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



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Addendum 1_Staff Augmentation

		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: CohnReznick LLP

AUTHORIZED SIGNATURE: _____

NAME and TITLE (Print or Typed): Frank Banda, Partner

DATE: 8/27/2025

03

Statement of Qualifications

North Carolina

Department of Commerce – Division of
Community Revitalization

Staff Augmentation

Community Development
Block Grant-Disaster
Recovery
Expert Administrative Support

Request for Proposals #: Doc1677946894



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Angie Dunaway

DCR Procurement Director

angela.dunaway@commerce.nc.gov

September 11, 2025

Re: CohnReznick Statement of Qualifications Request for Proposals #: Doc1677946894

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

**CohnReznick is
ready to support
DCR on all 17
task areas**

CohnReznick is proposing 70+ individuals ready to support DCR across all 17 task areas, bringing the full strength of our experienced team, proven tools, and tailored solutions to every aspect of future task orders.



— Lee Lilley
North Carolina Commerce
Secretary





Narrative Response

[Redacted Content]



Proven Subcontractor Team

Because CohnReznick is already delivering disaster recovery services on programs comparable in size and scope, we have built a trusted network of subcontractors who consistently deliver high-quality support in specialized areas. These partners, specialists in environmental reviews, engineering, and communication and outreach, are fully integrated into our project management structure and ready to mobilize quickly under a unified approach.



Metric Consulting	NP Strategy	Michael Baker International
Women-owned, minority-owned firm with 13 years of CDBG-DR experience, including in the State of North Carolina	Strategic communications firm with proven experience supporting the State of North Carolina with public affairs needs	Engineering and consulting firm with a proven track record in CDBG-DR programs, including in the State of North Carolina
Support on Task Areas 1, 2, 5, 8, 12, 14, and 17	Support on Task Area 14	Support on Task Areas 11 and 17



Metric Consulting

Metric Consulting is a privately held, woman and minority-owned disaster recovery and emergency management firm. Following Hurricanes Ike and Dolly, Metric worked with the Texas General Land Office (GLO) to provide CDBG-DR program administration, case management, and support of the GLO’s Homeowner Opportunity Program. Metric is assisting the State of Louisiana as a subconsultant to CohnReznick with the administration of its Restore Louisiana Homeowner Assistance Programs.



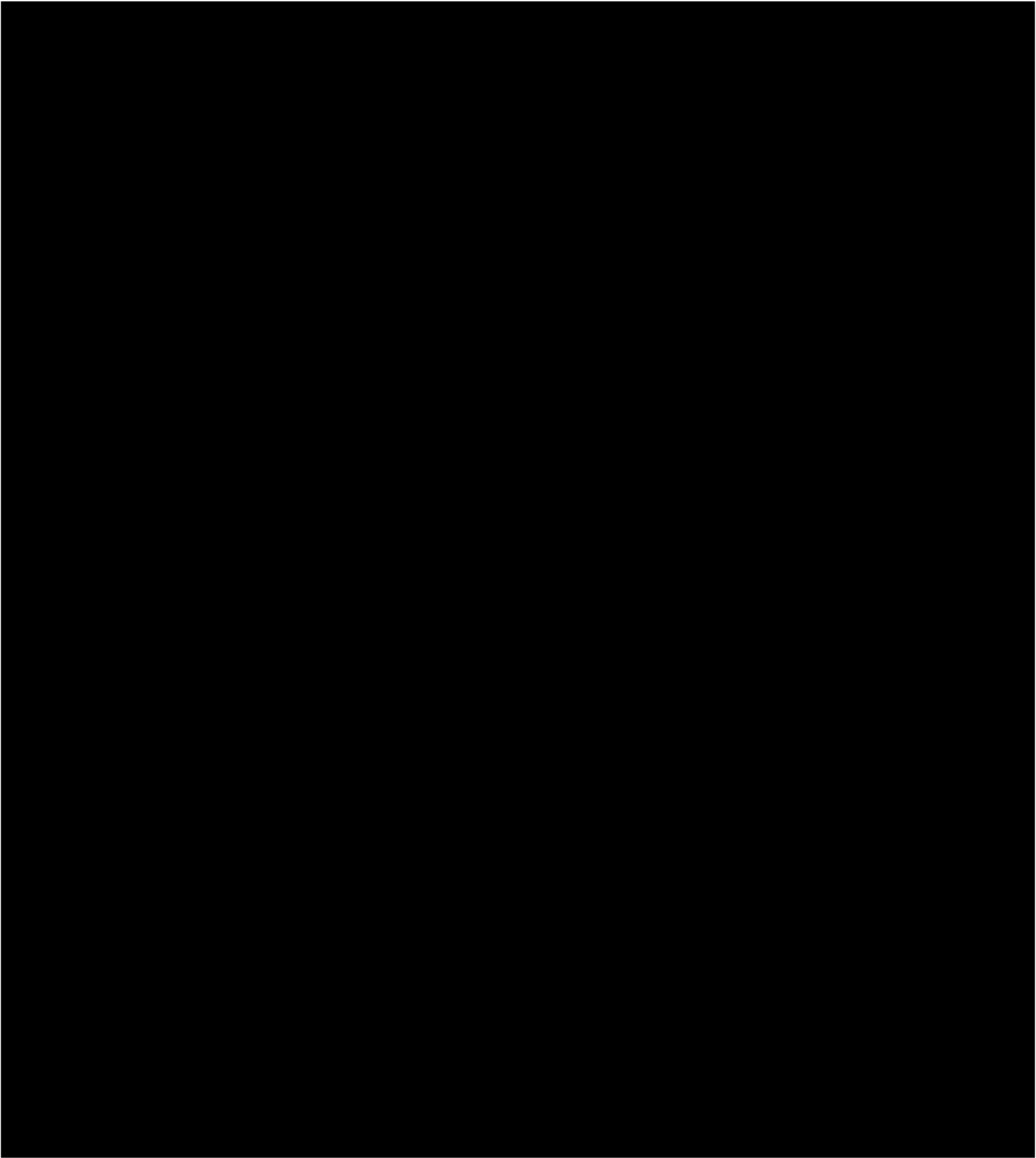
NP Strategy

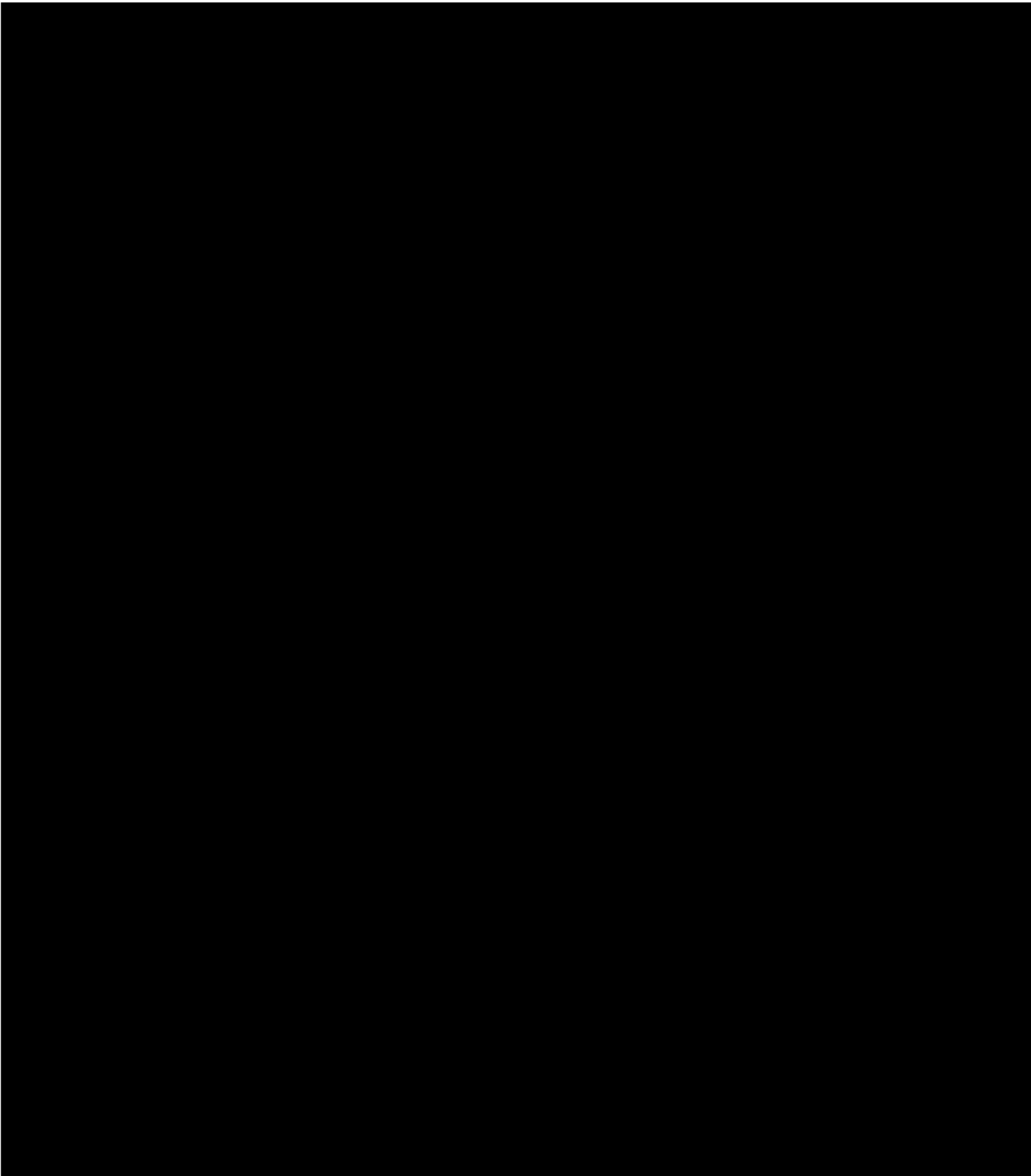
NP Strategy is a strategic communications firm known for delivering impactful results. With a team of professionals from journalism, politics, and both public and private sectors, plus award-winning creatives, they offer expertise in outreach and communications. NP Strategy maintains offices across North and South Carolina, positioning them to support all of DCR’s public affairs needs.

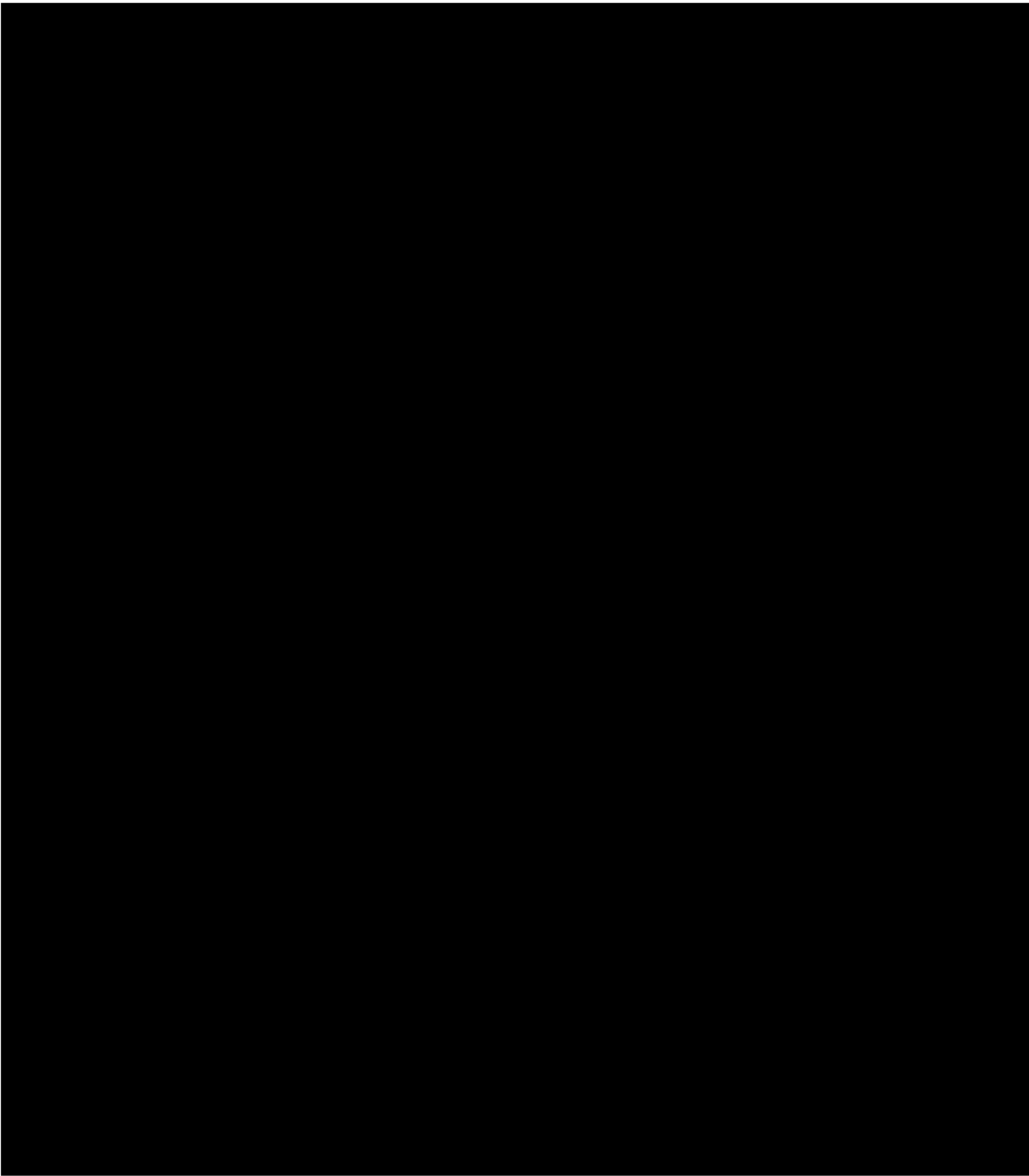


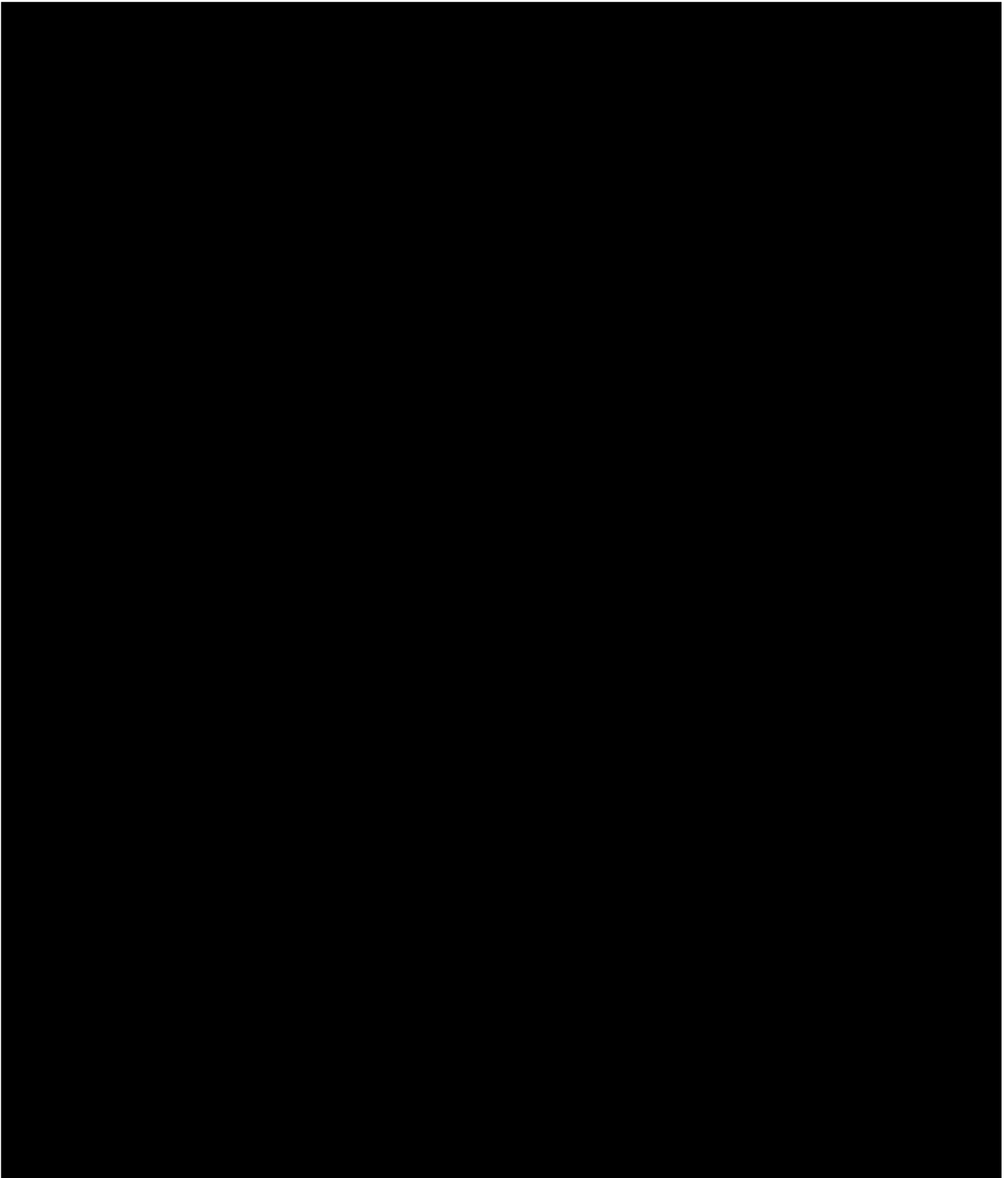
Michael Baker International

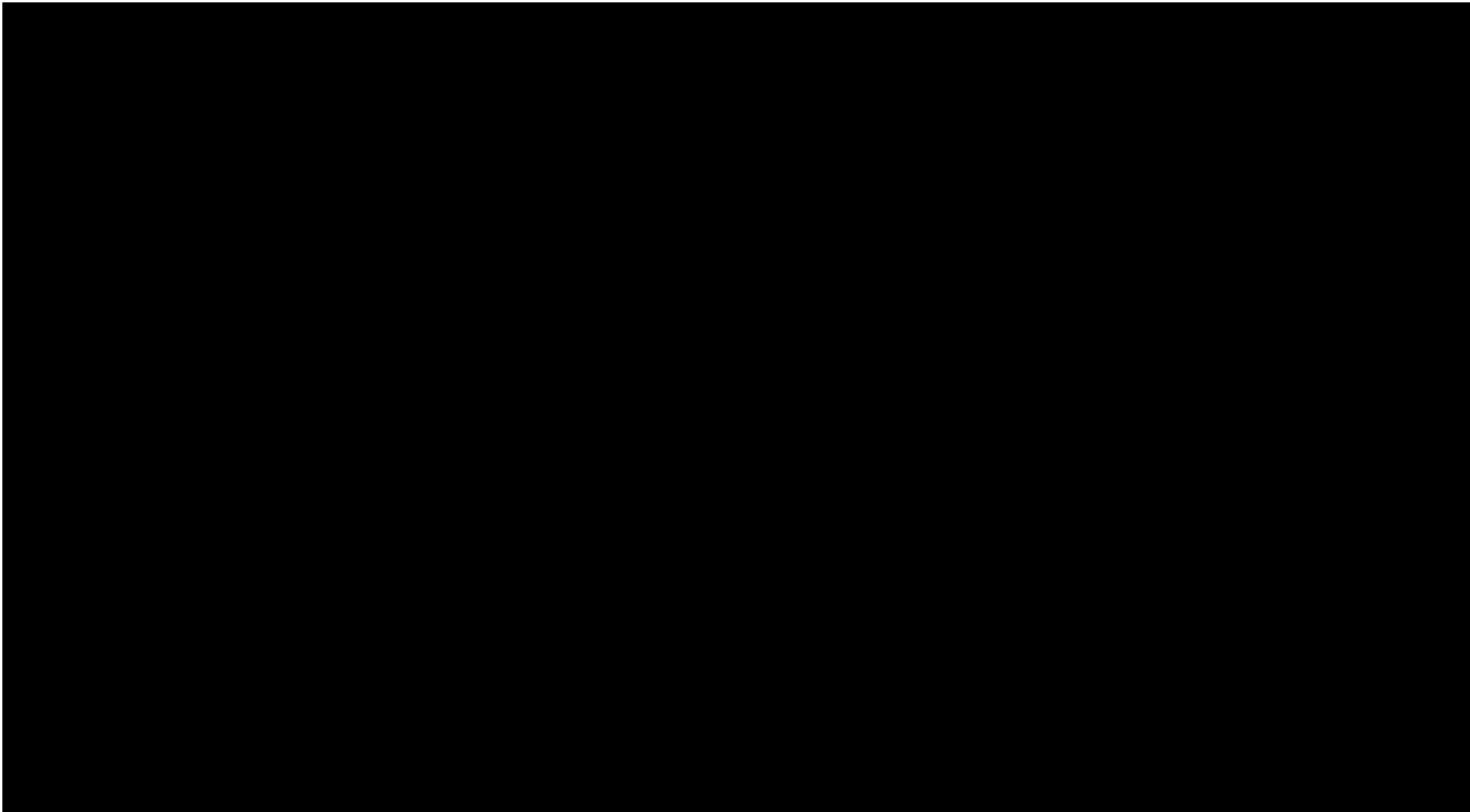
Michael Baker is a top-ranked engineering a firm with 3,500+ professionals nationwide, including 80+ in South Carolina and 160+ in North Carolina. Michael Baker provided grant services for over 20 years and consistently rank in the top 10% of U.S. engineering firms. The Cary, NC office will lead the team, offering DCR both local expertise and national resources.

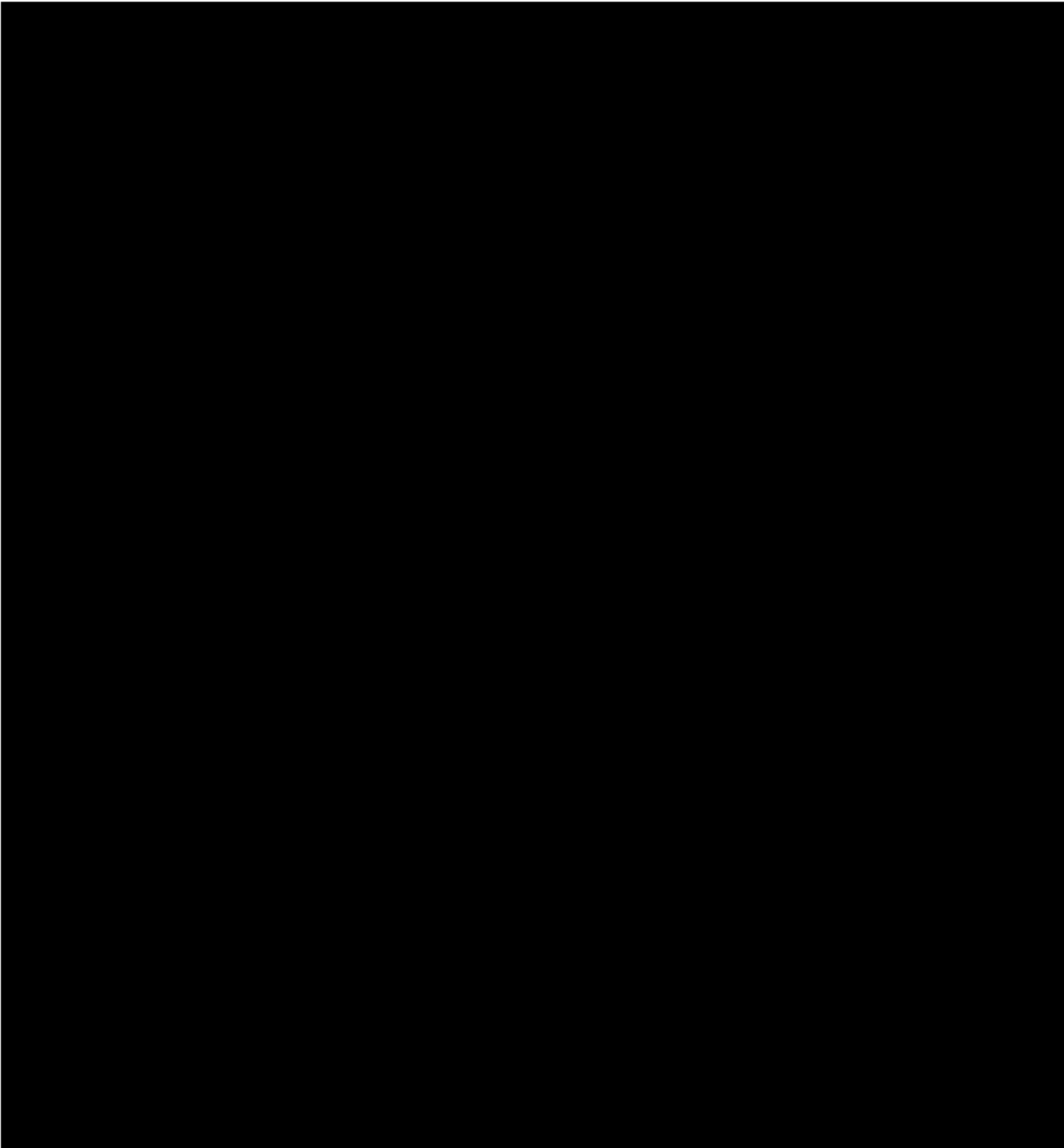


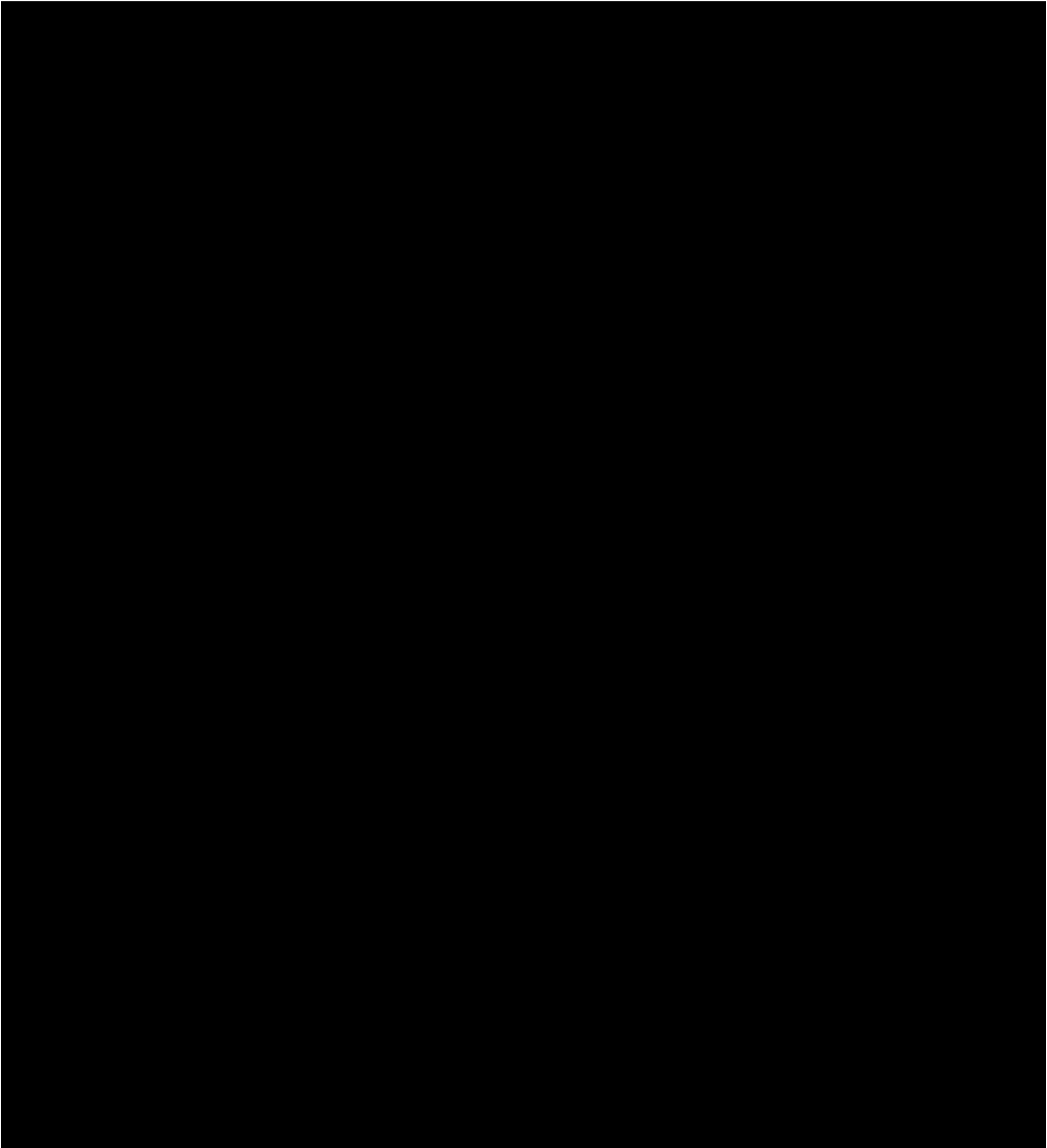


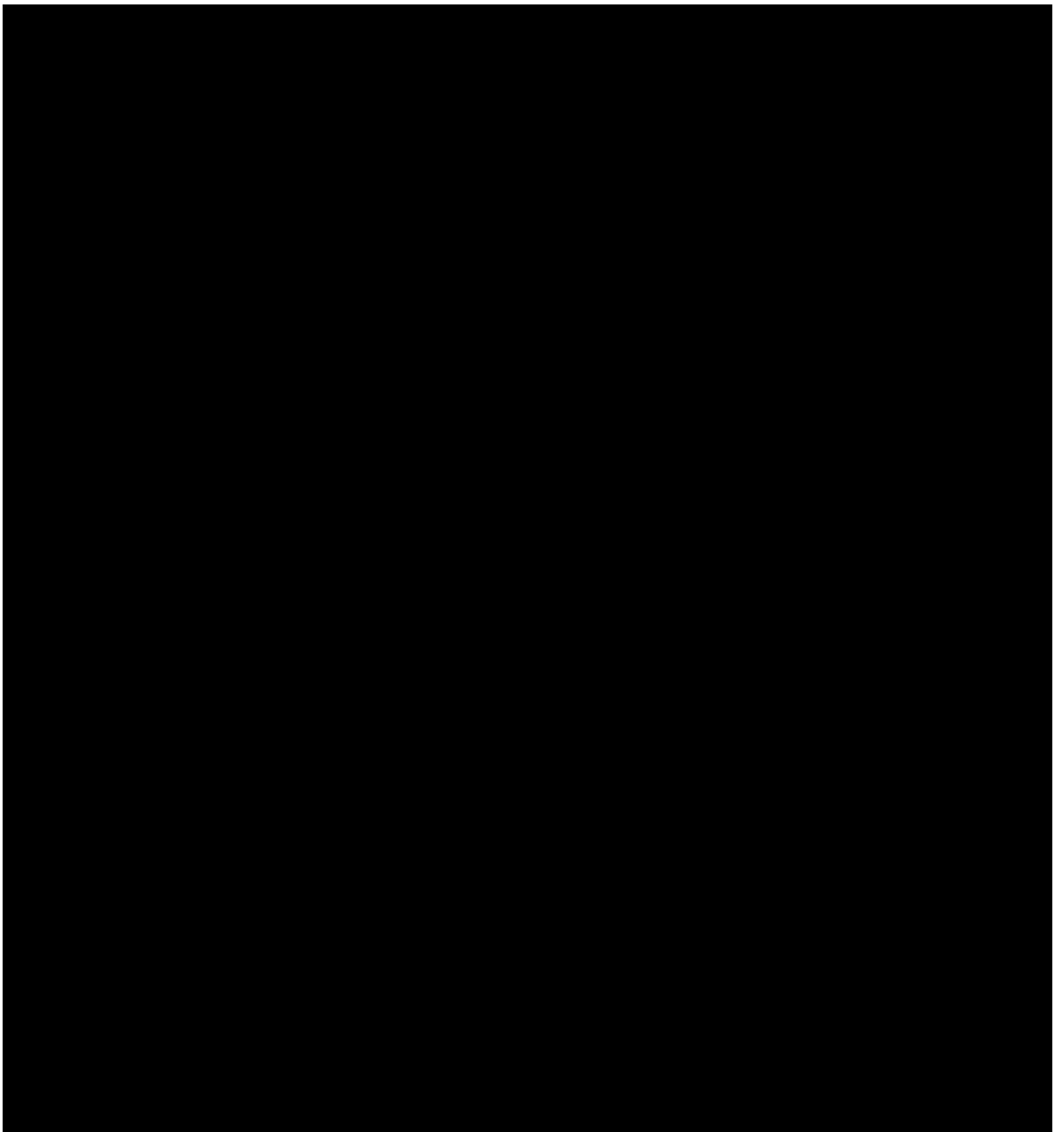


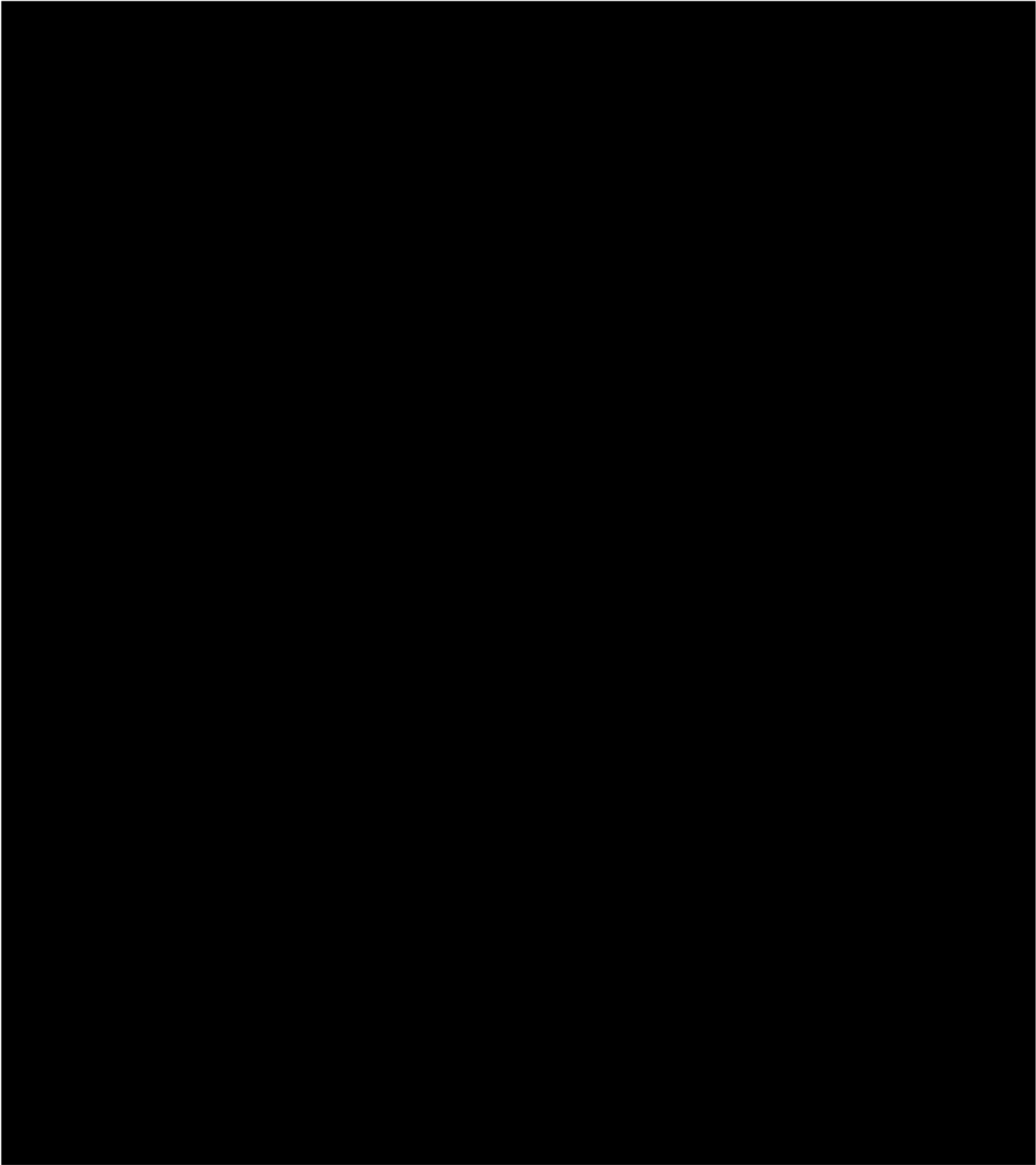


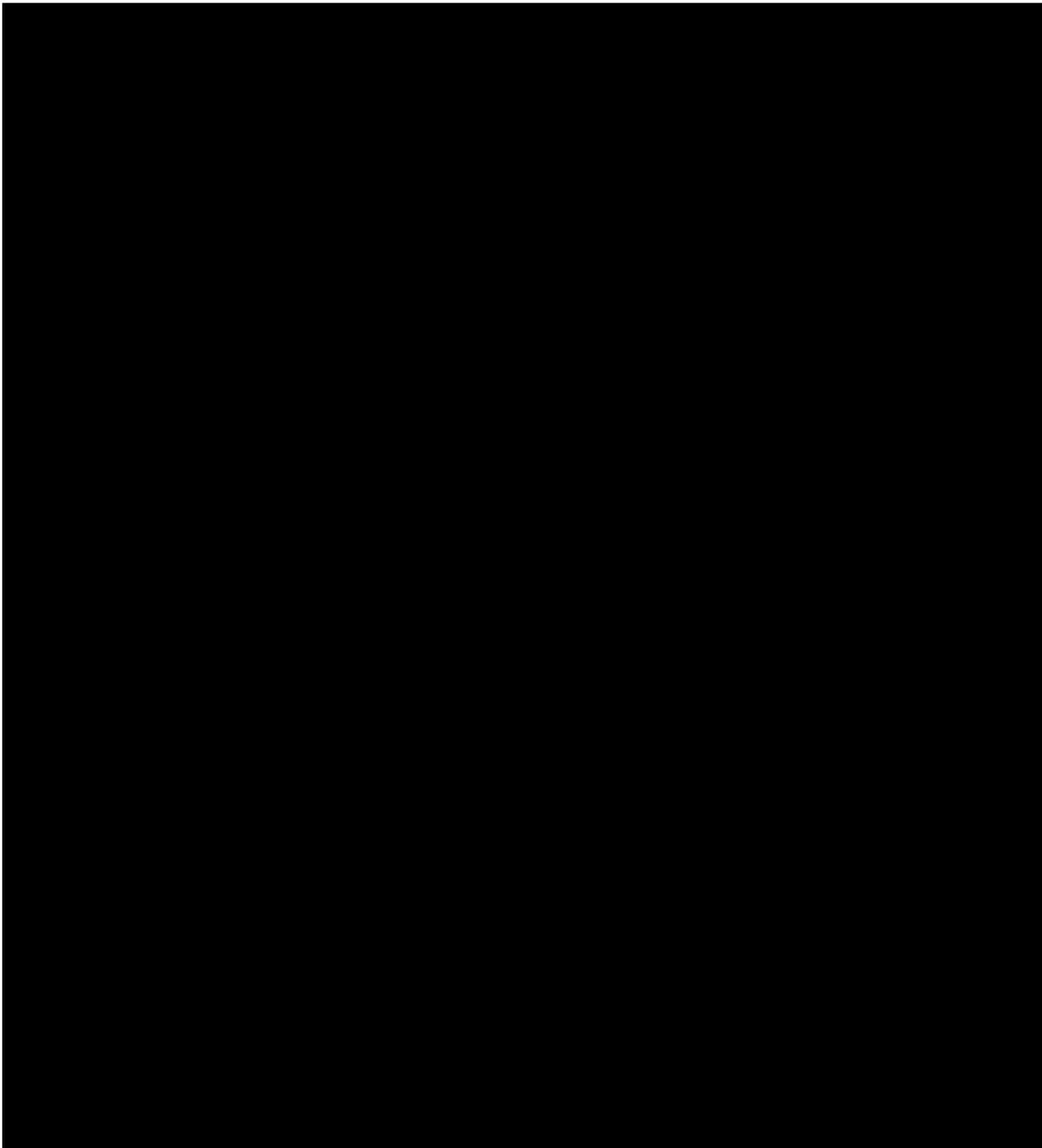


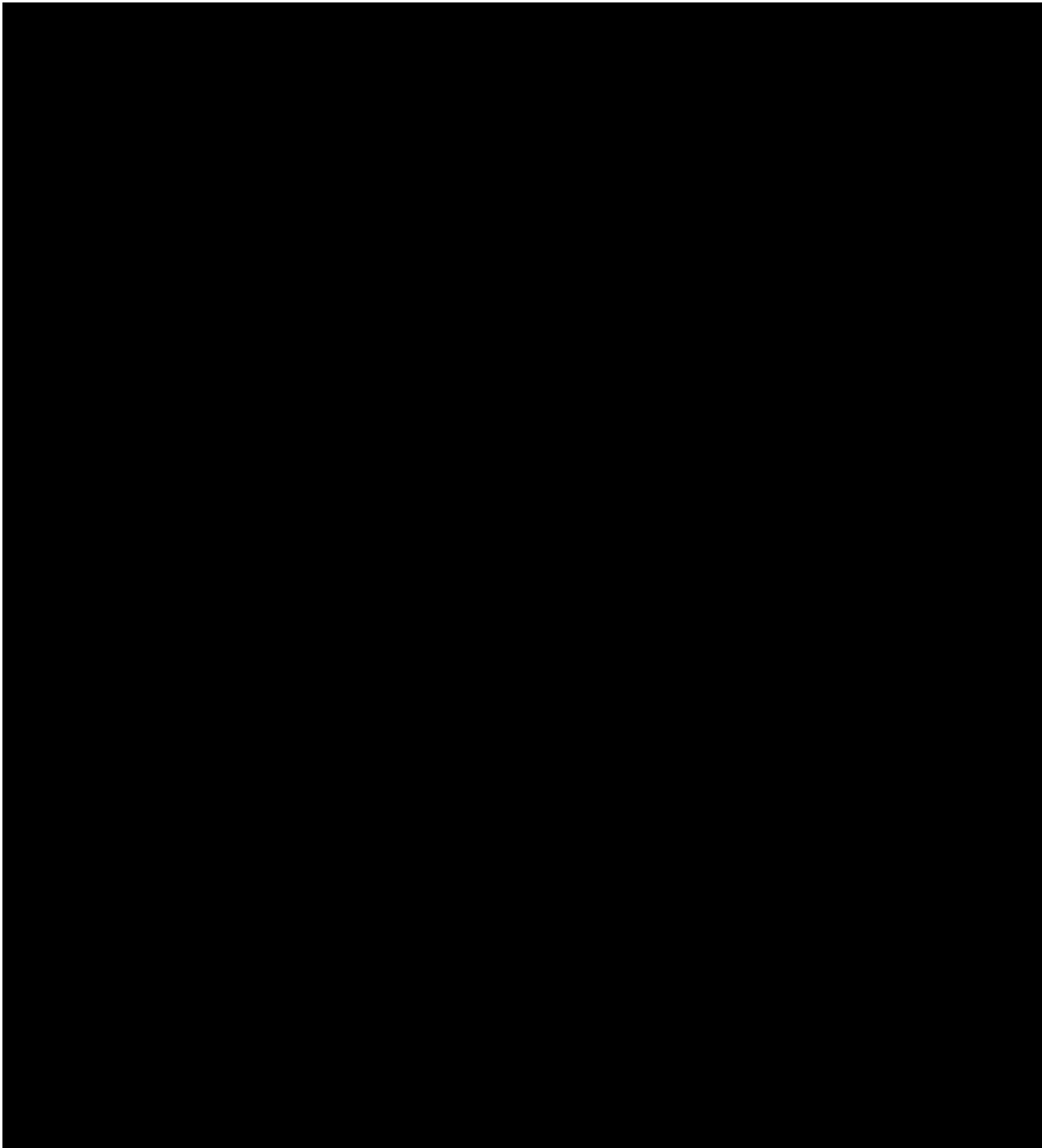


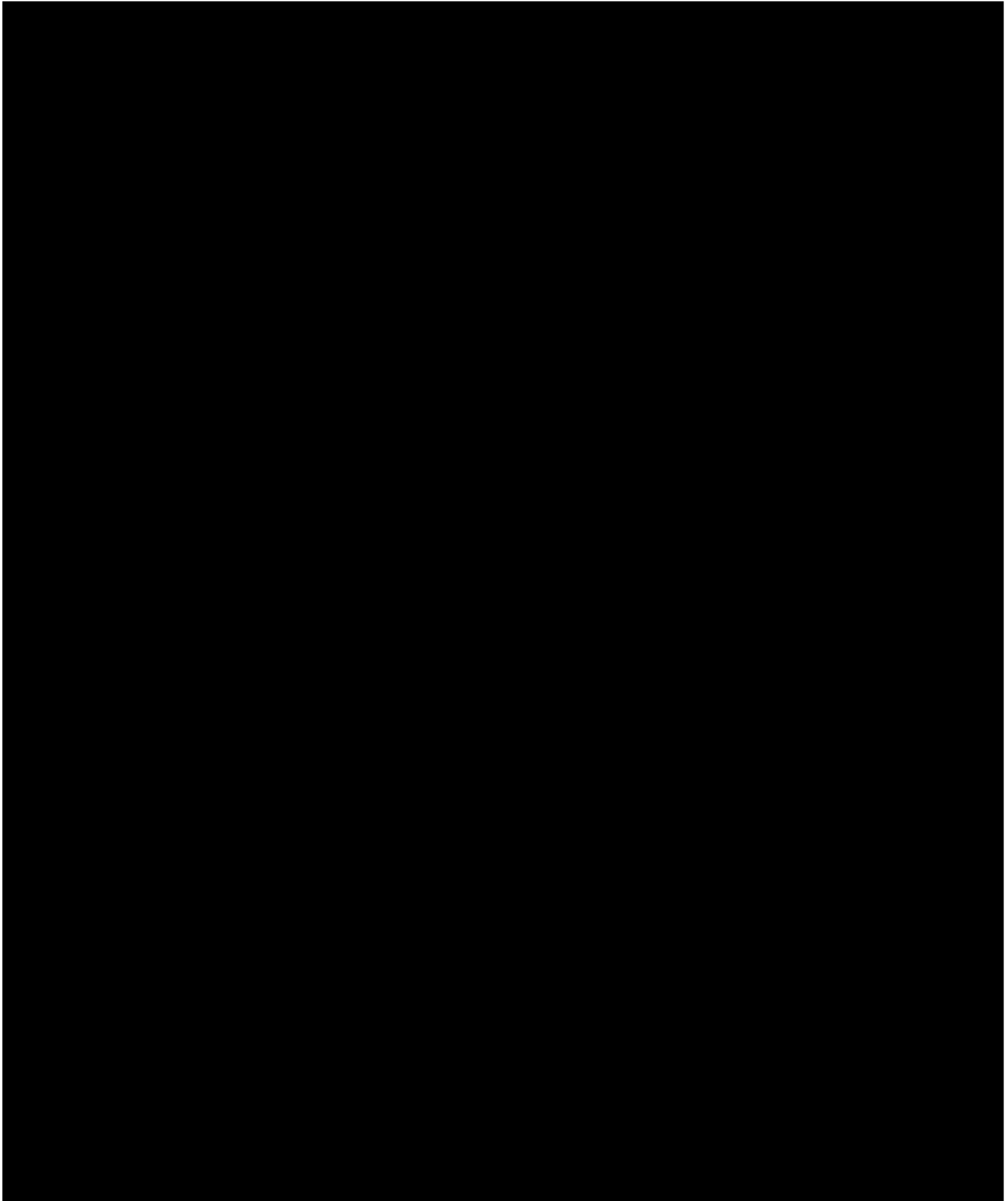


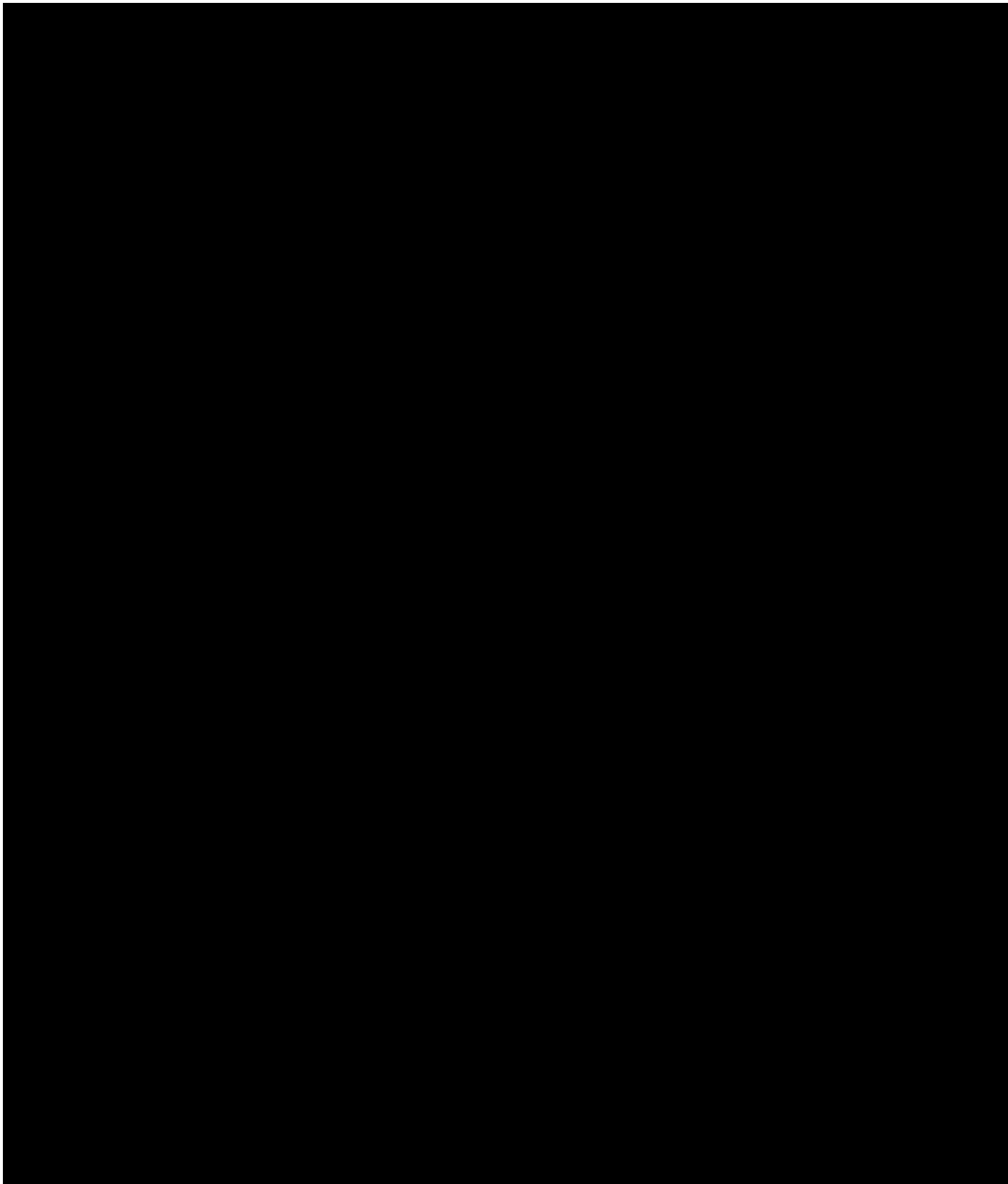


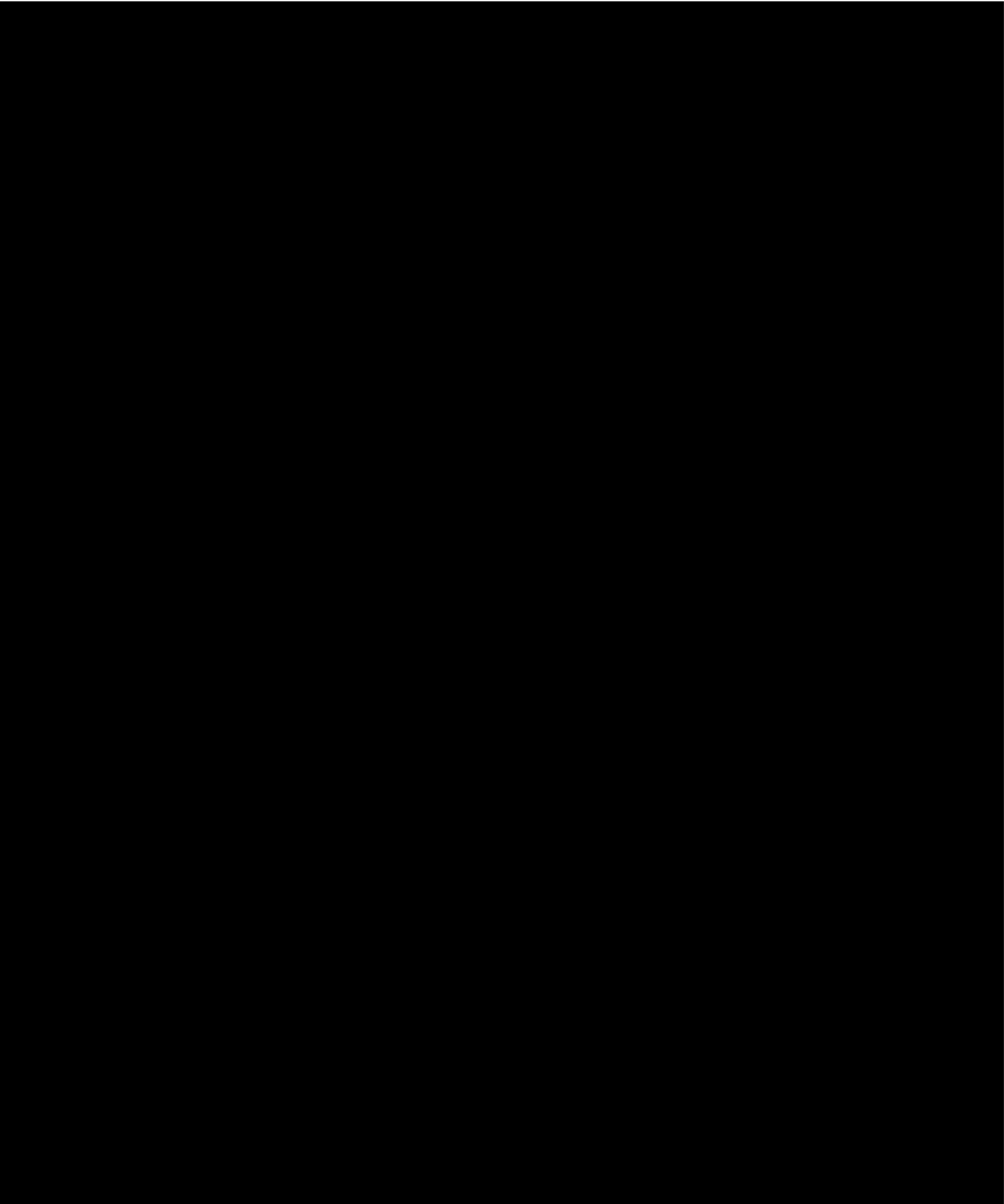


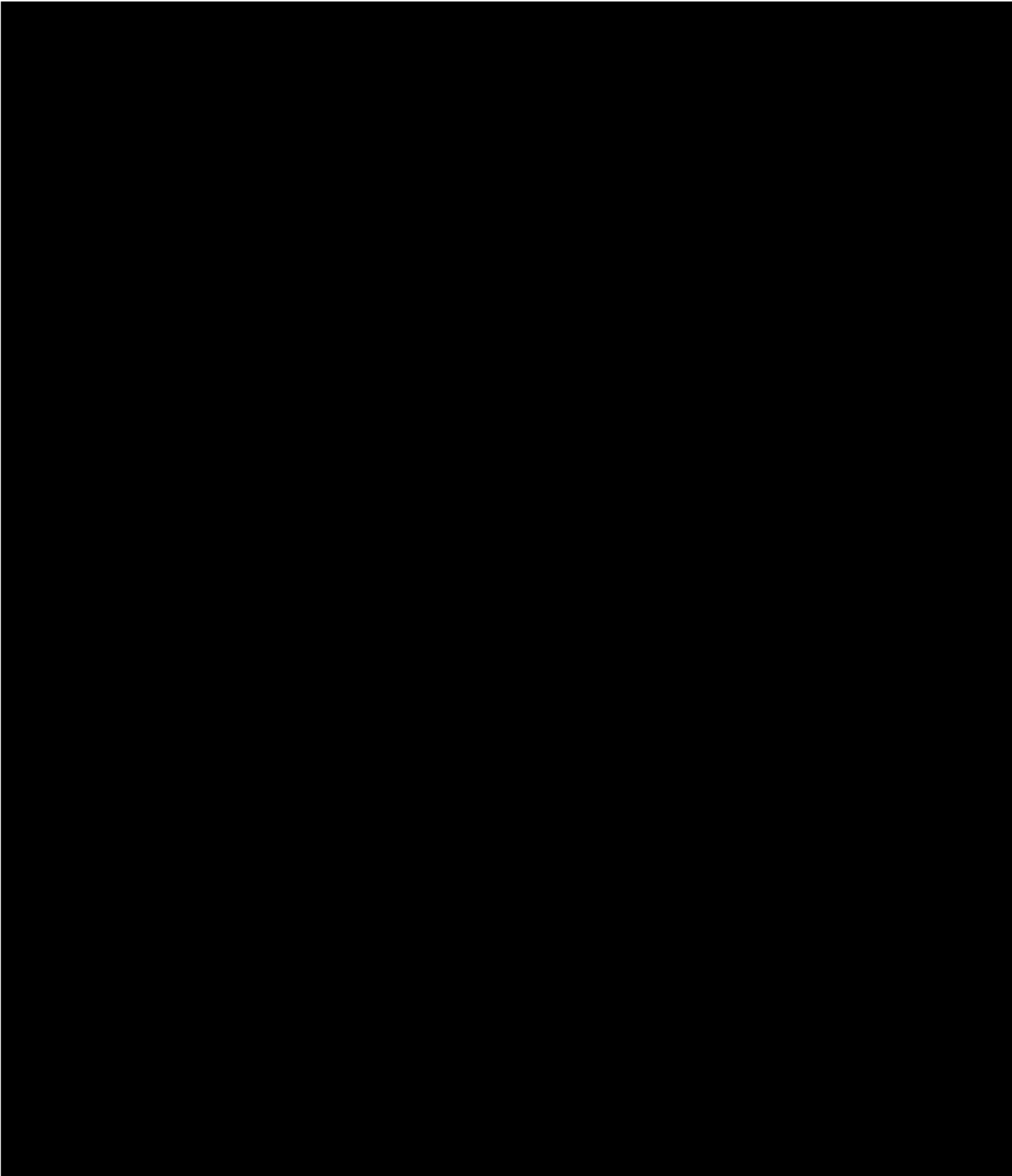


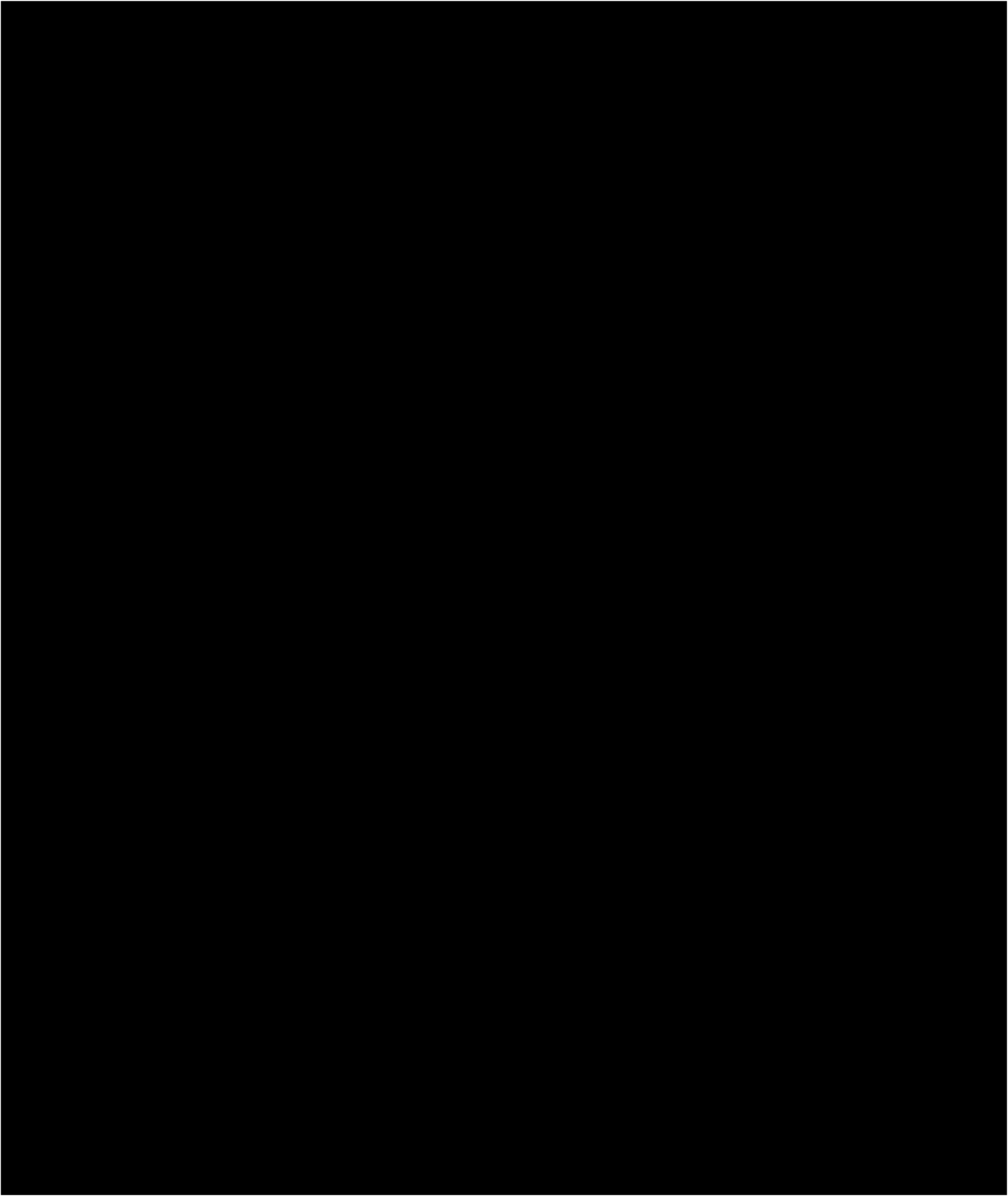


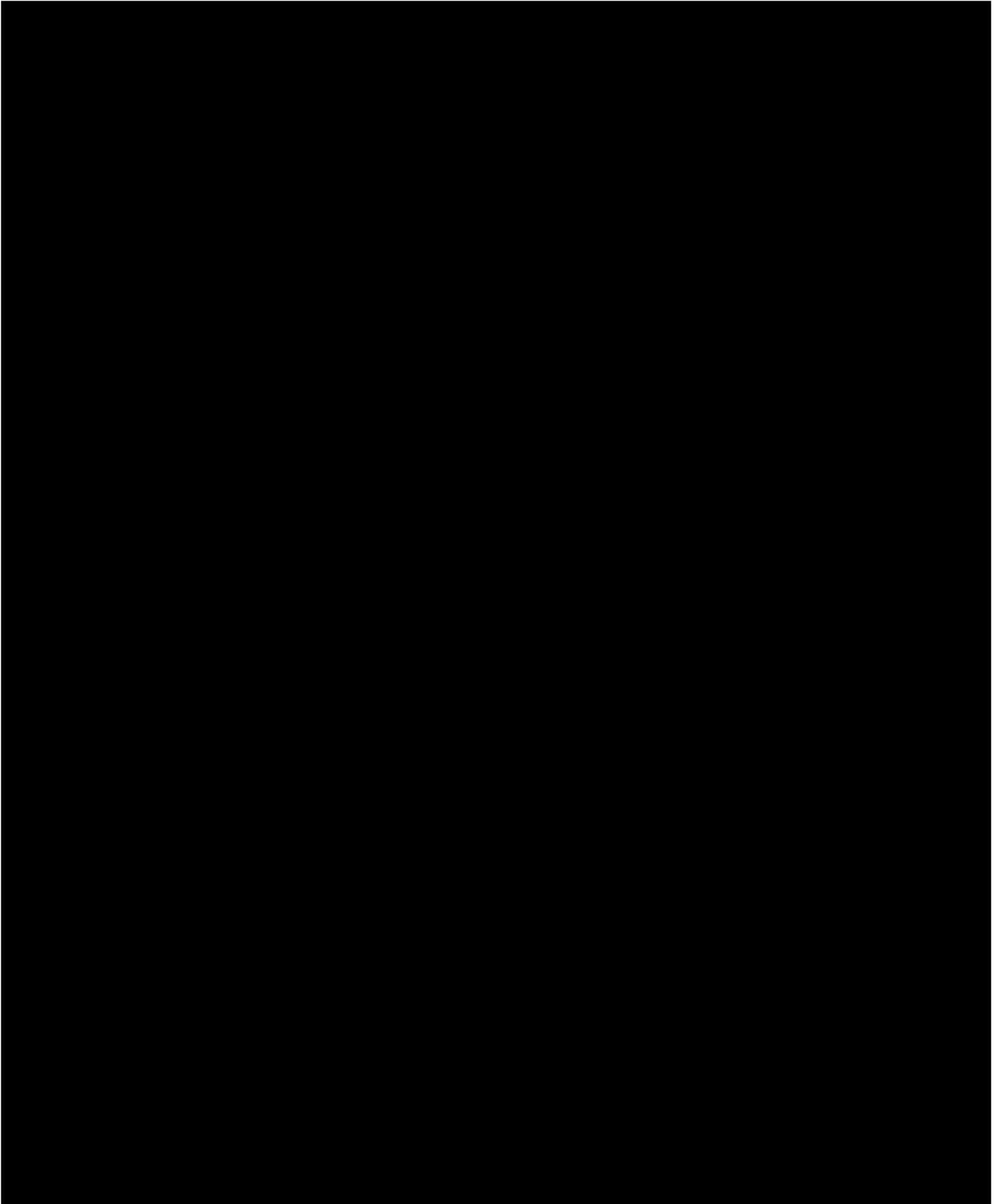


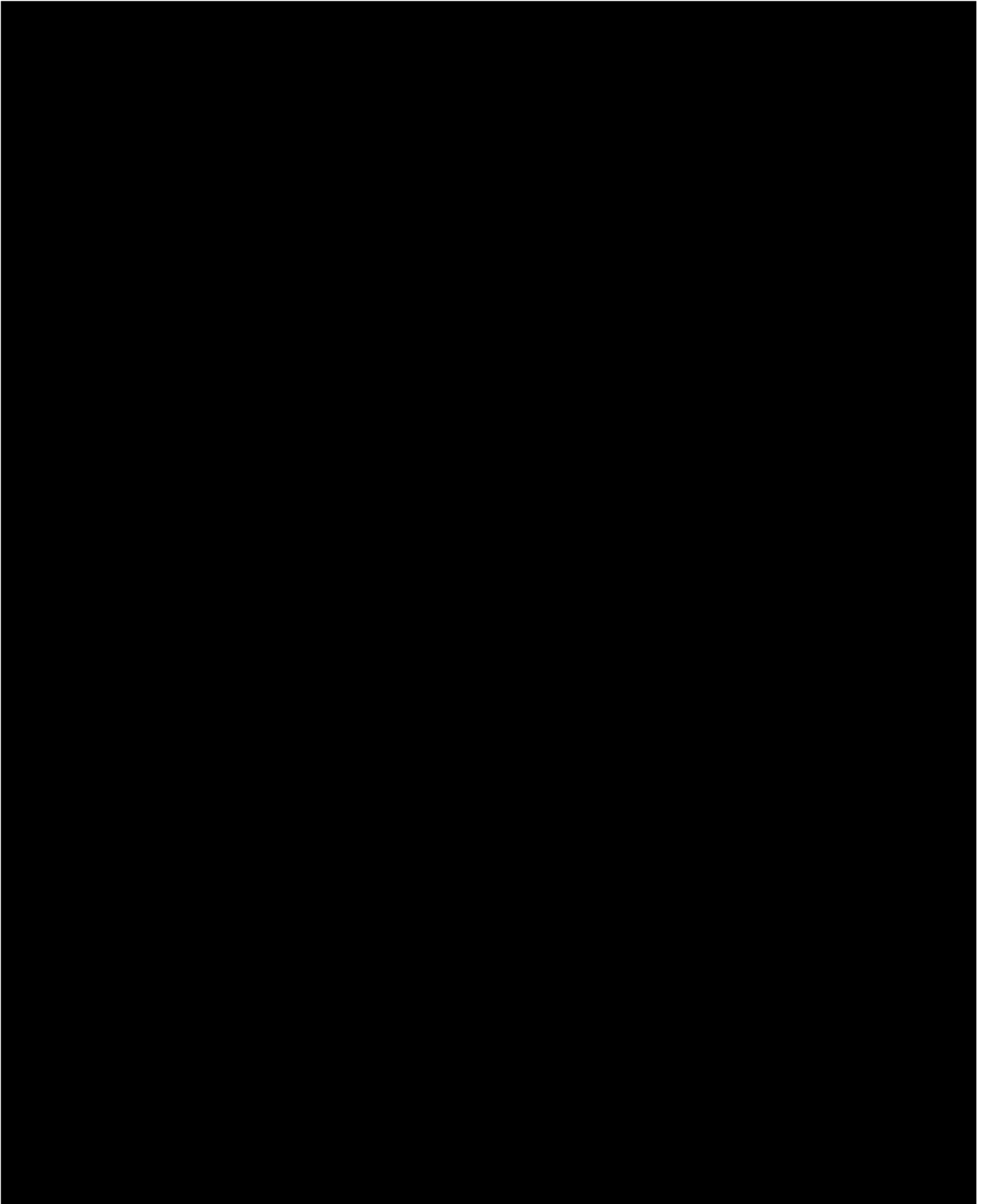


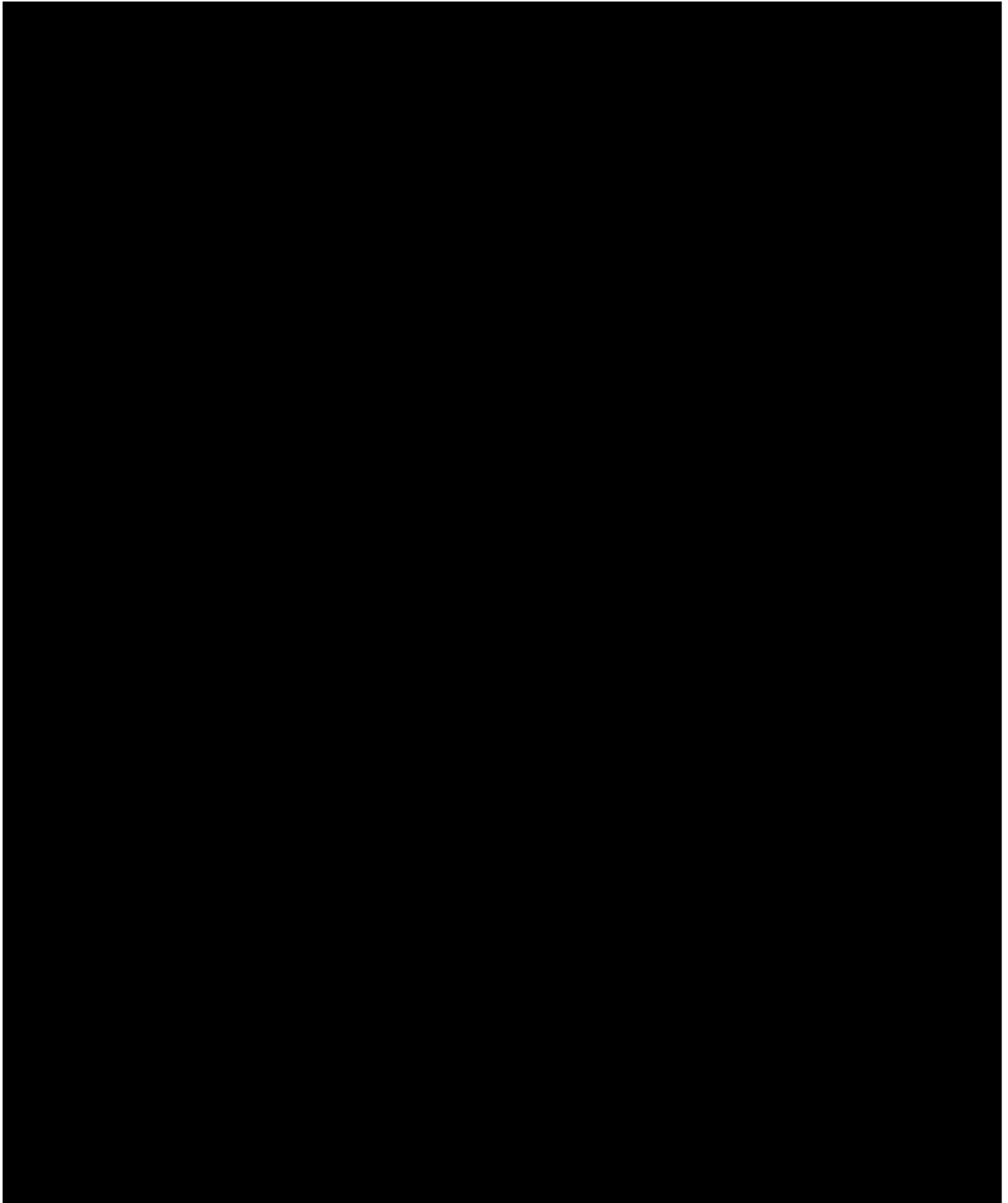


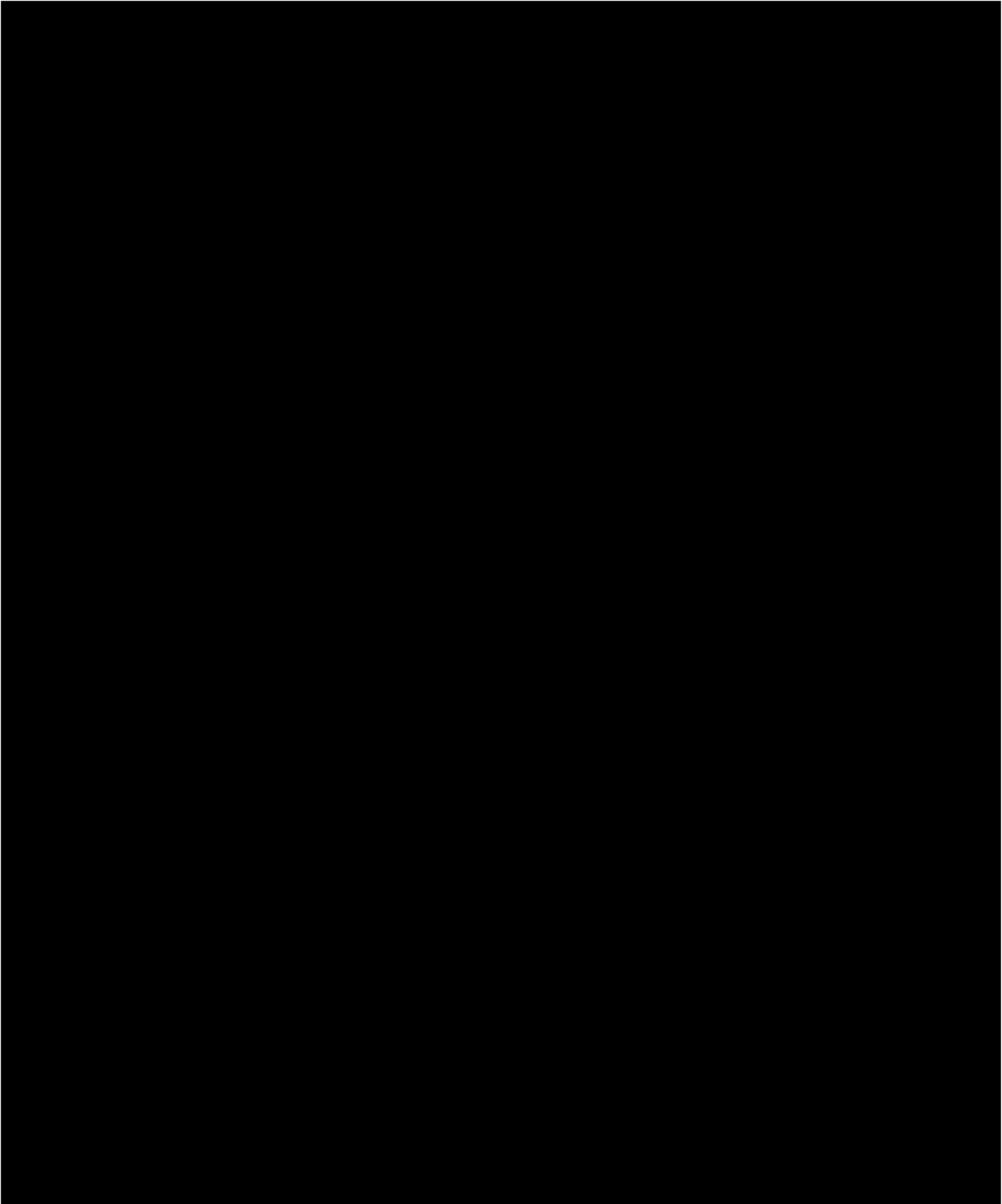


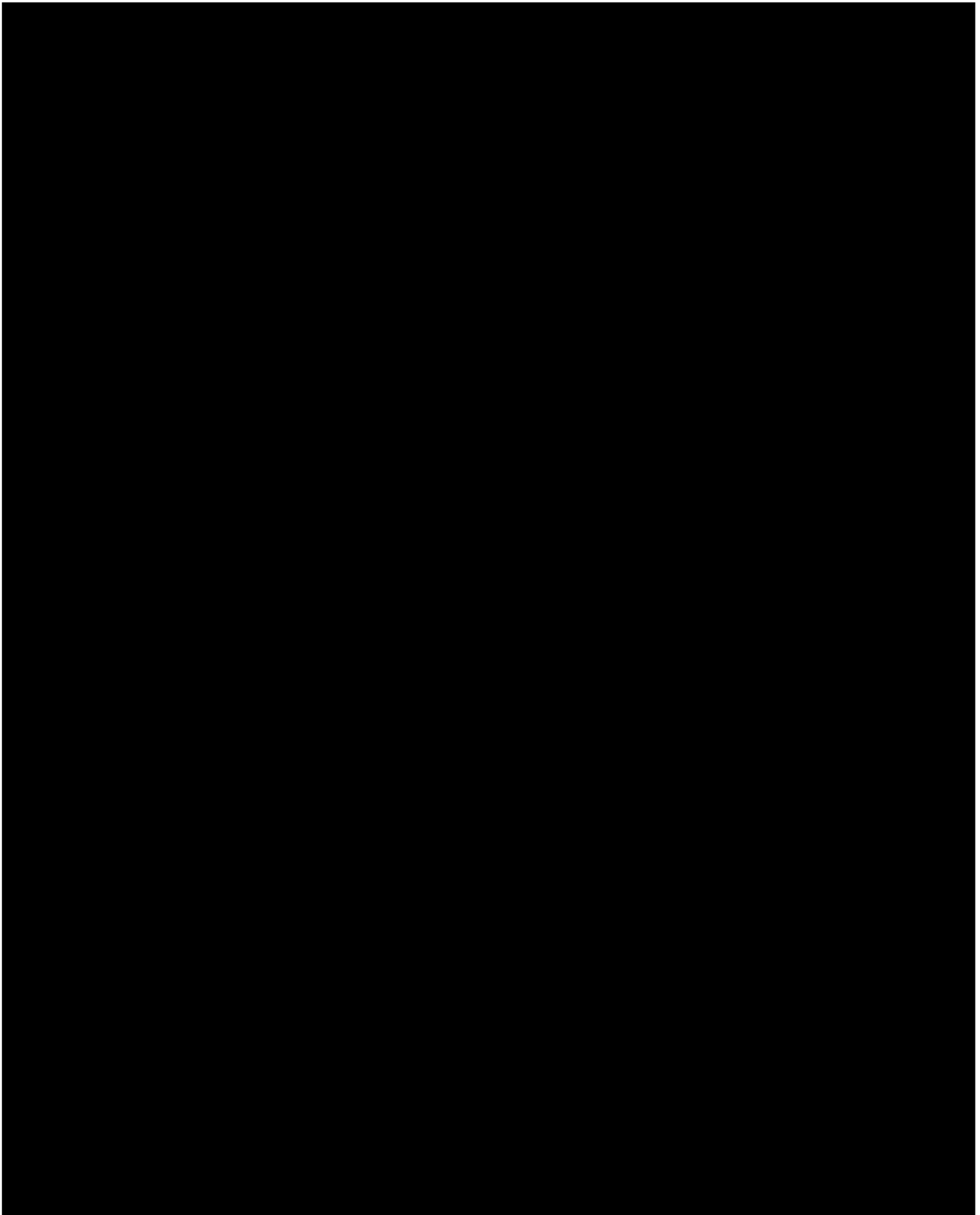


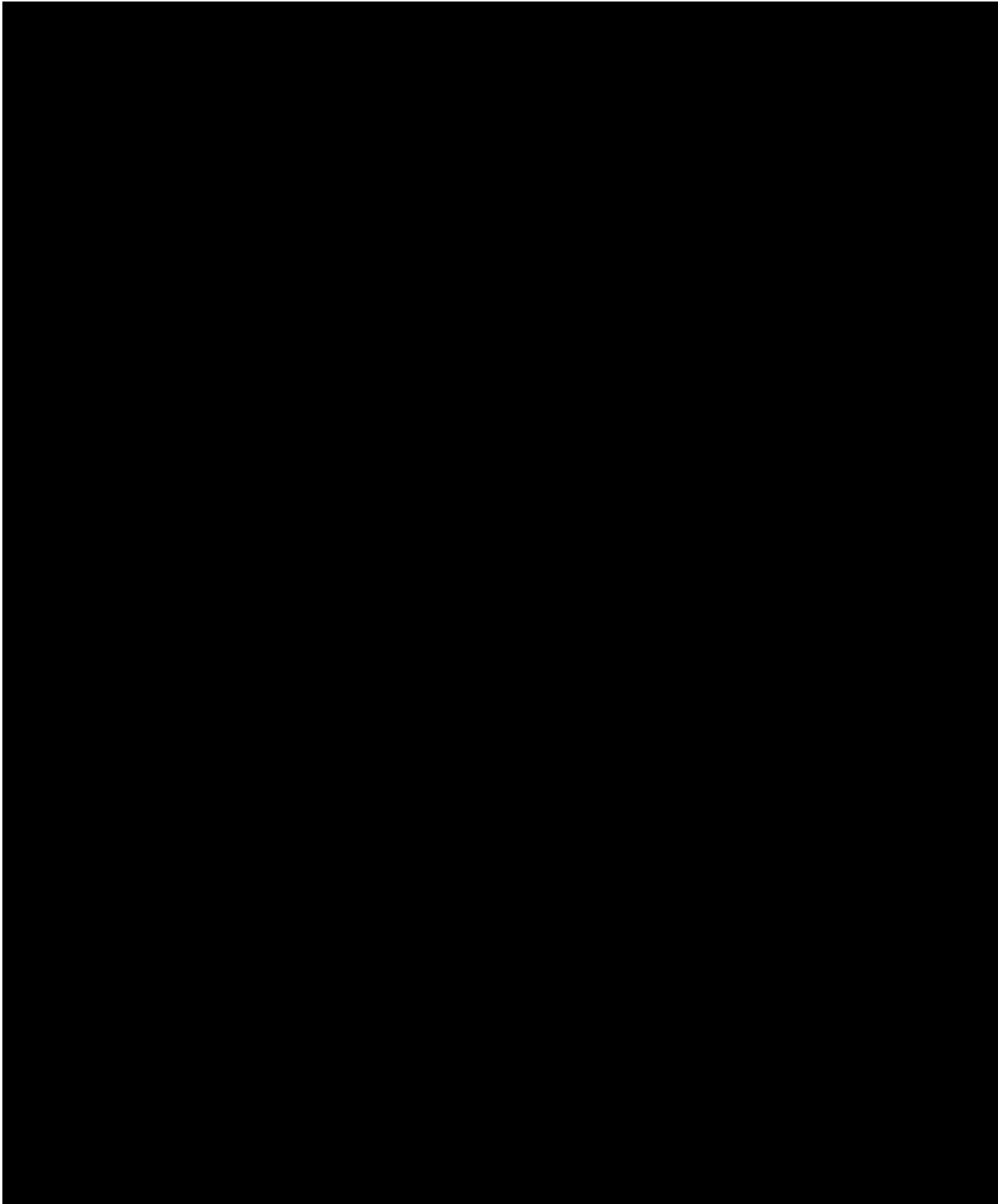


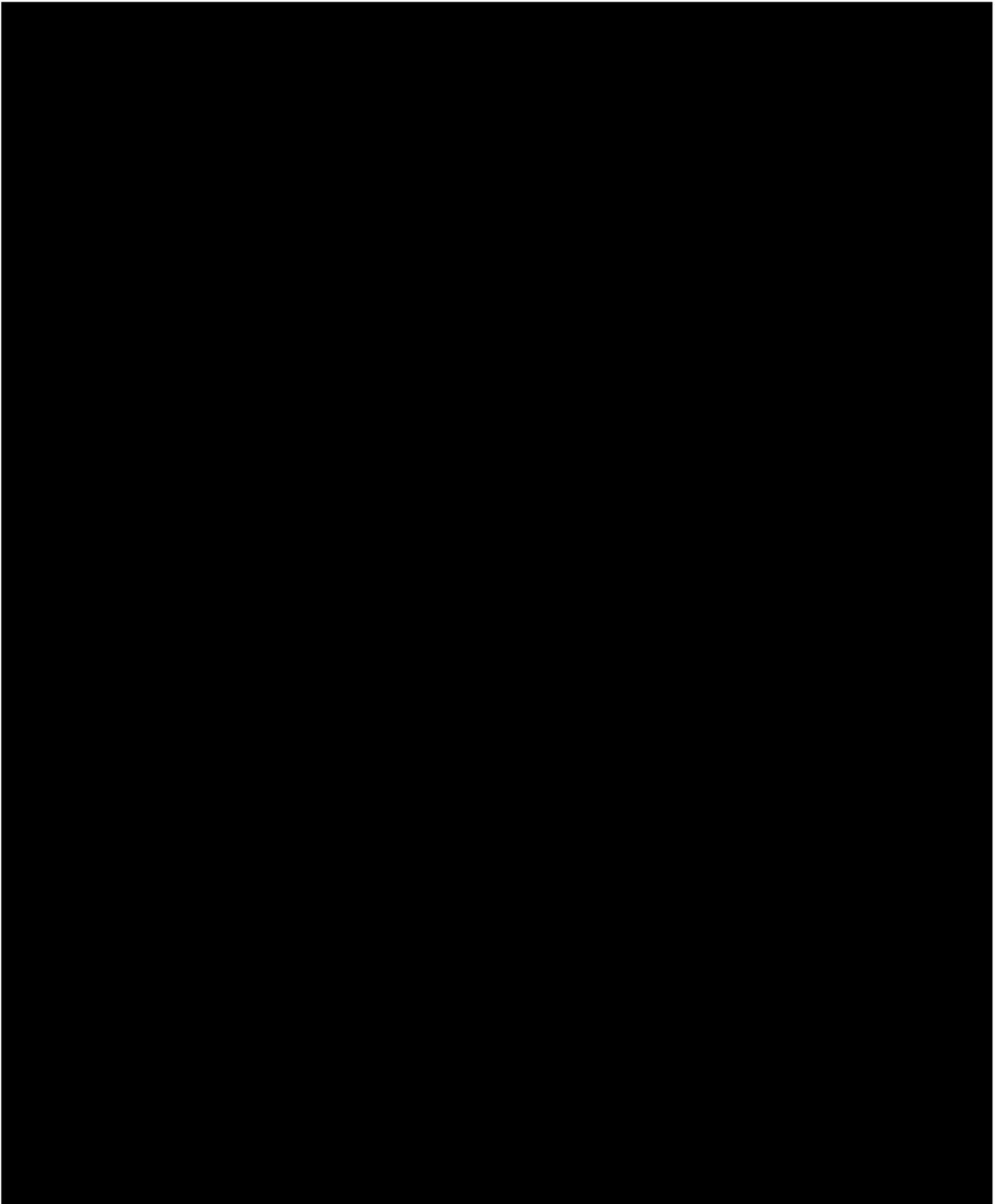


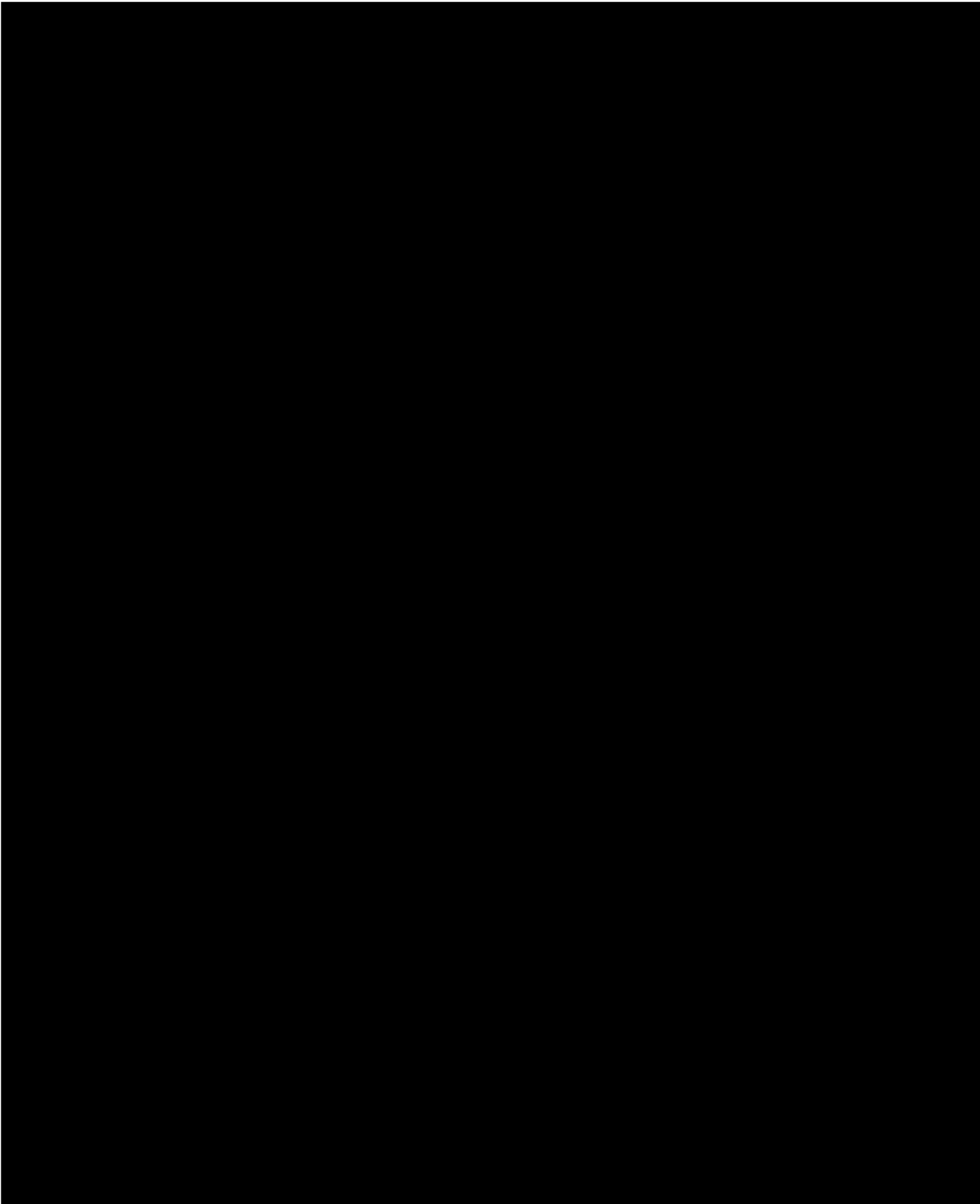


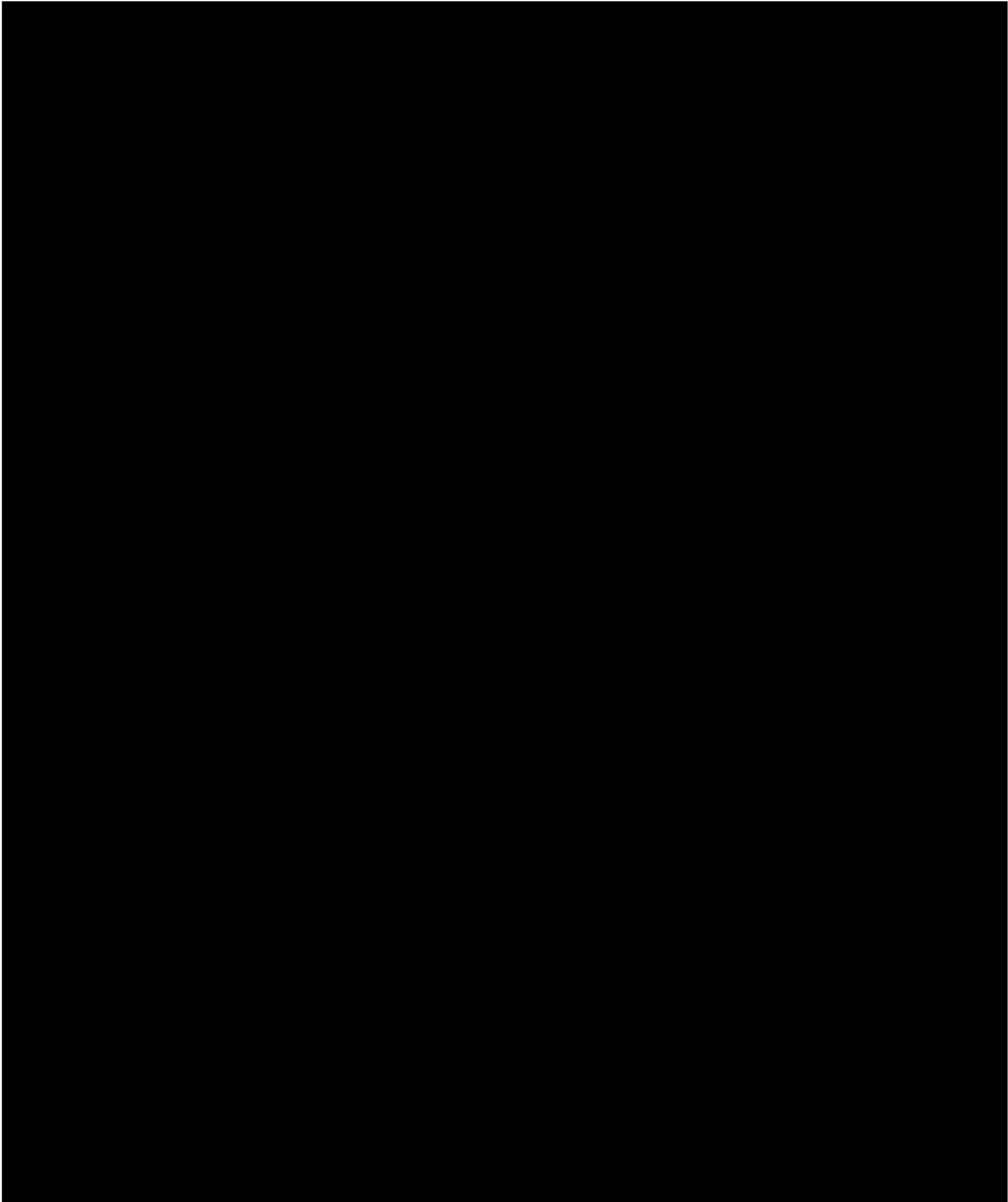


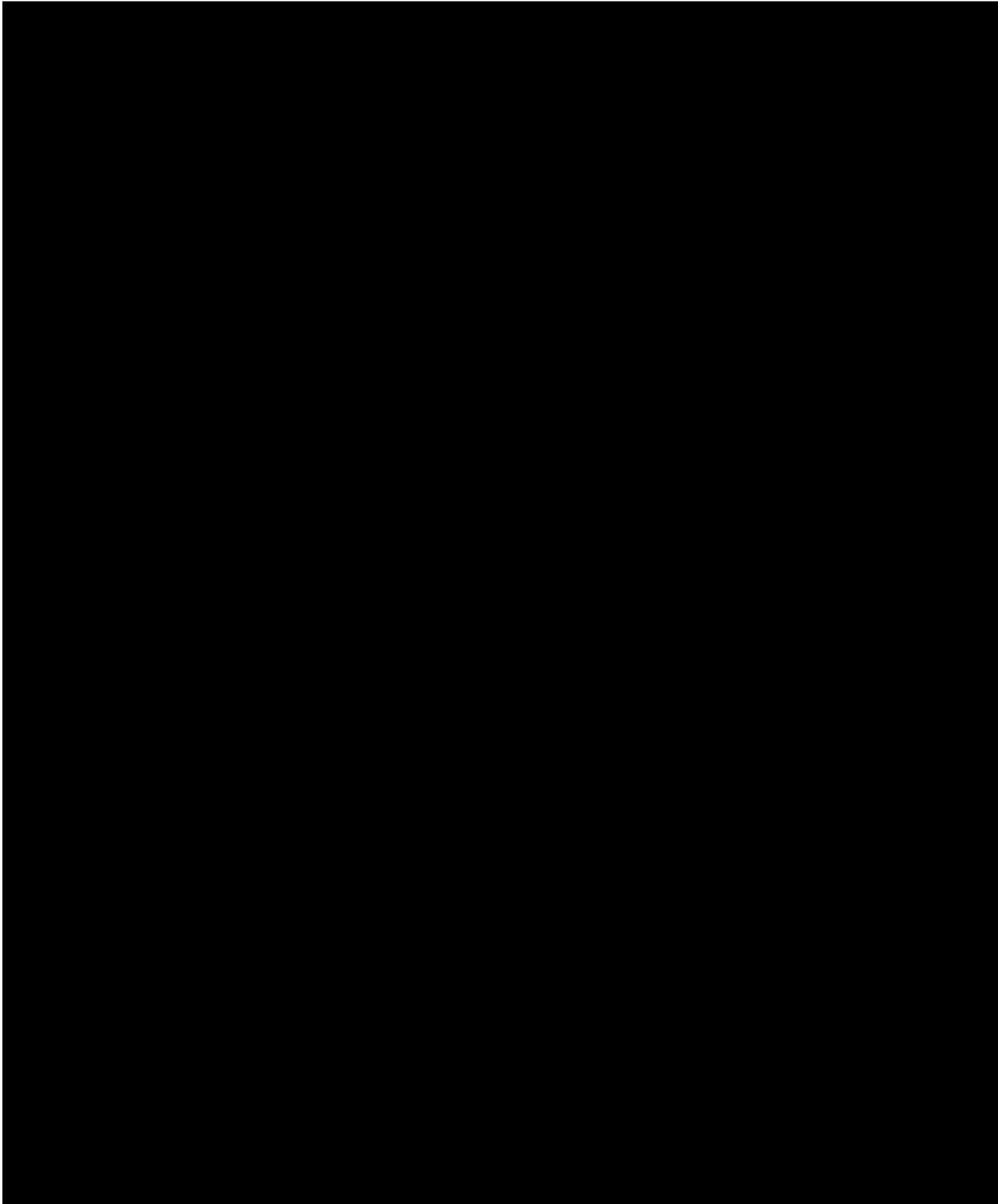


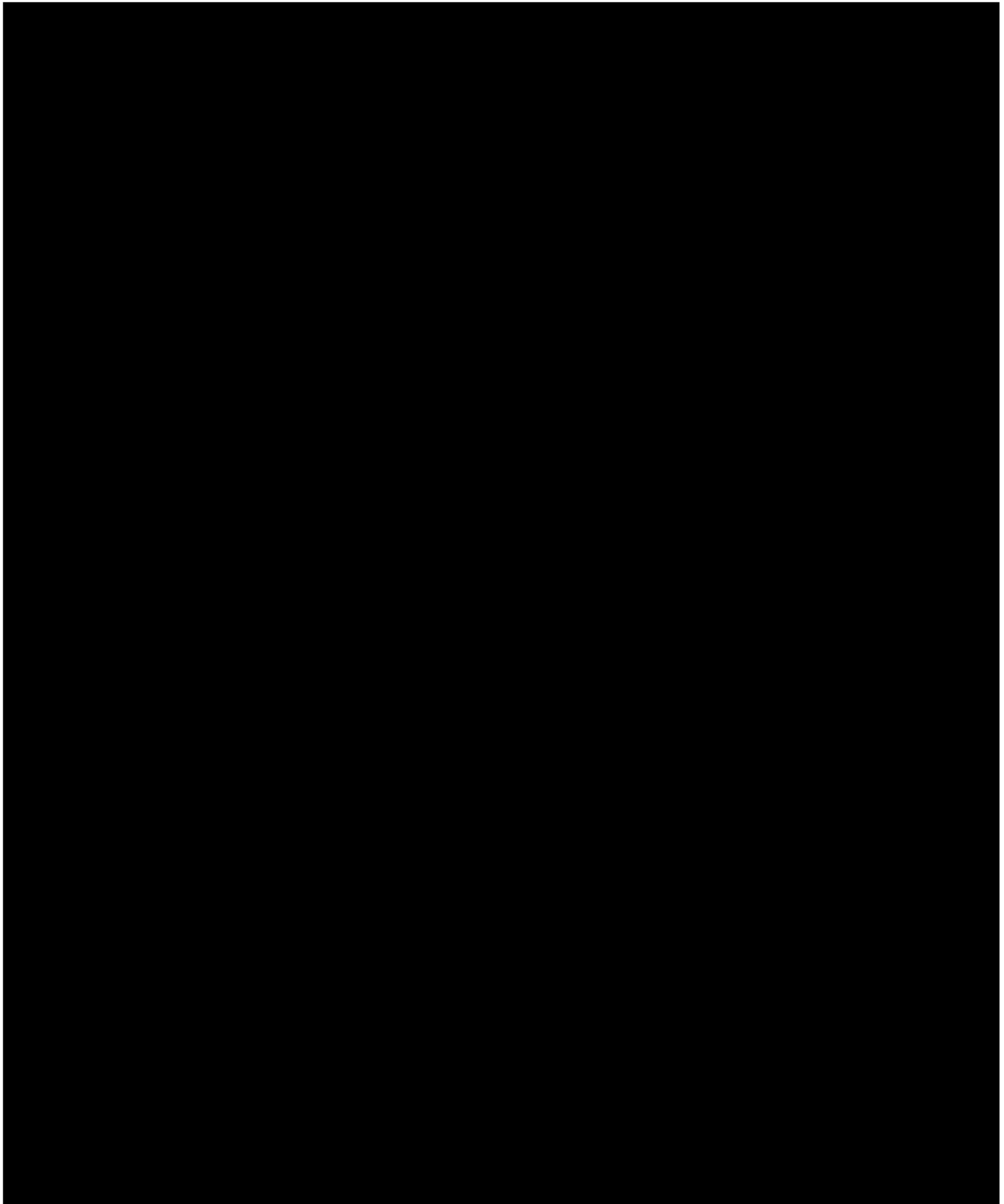


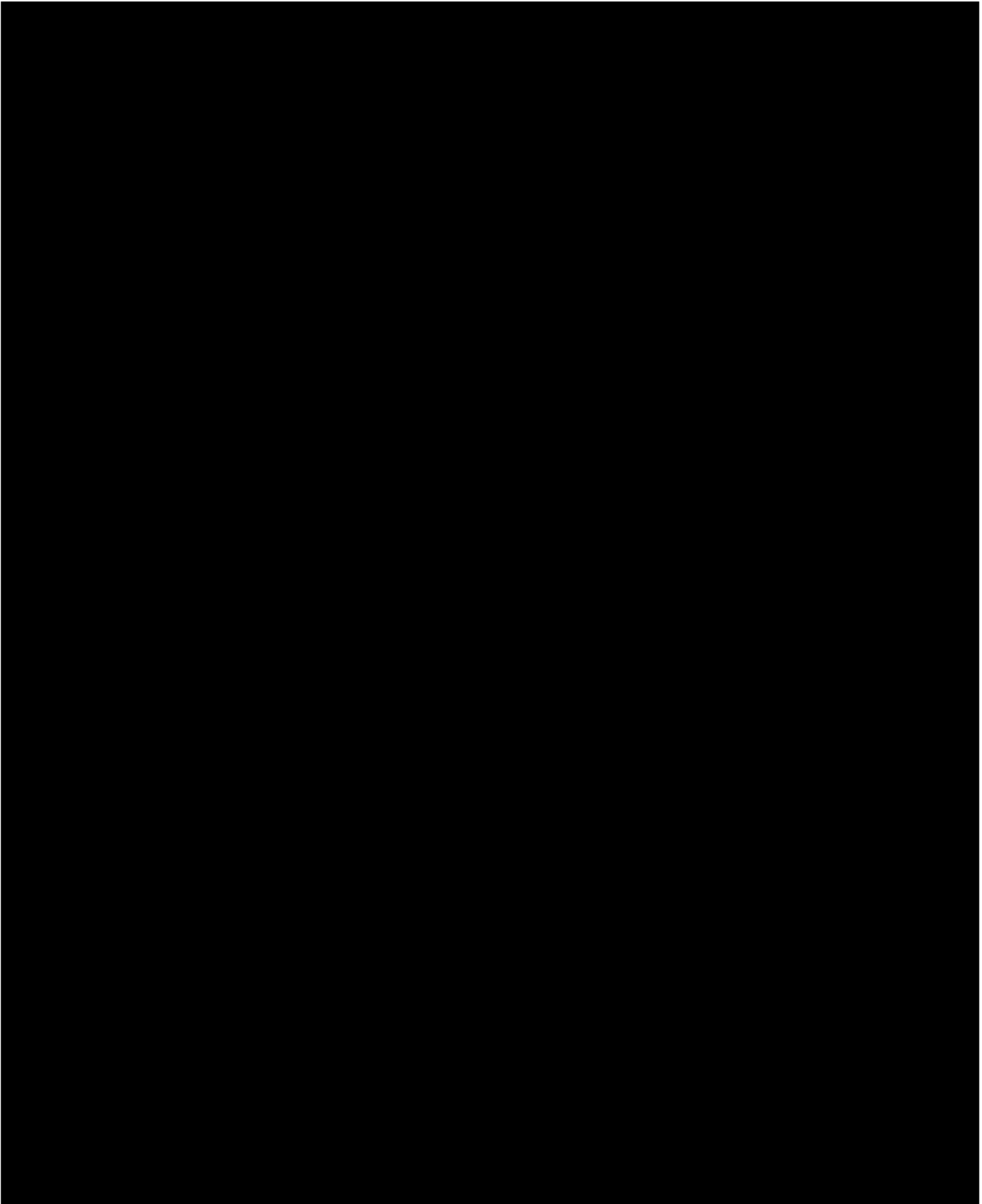


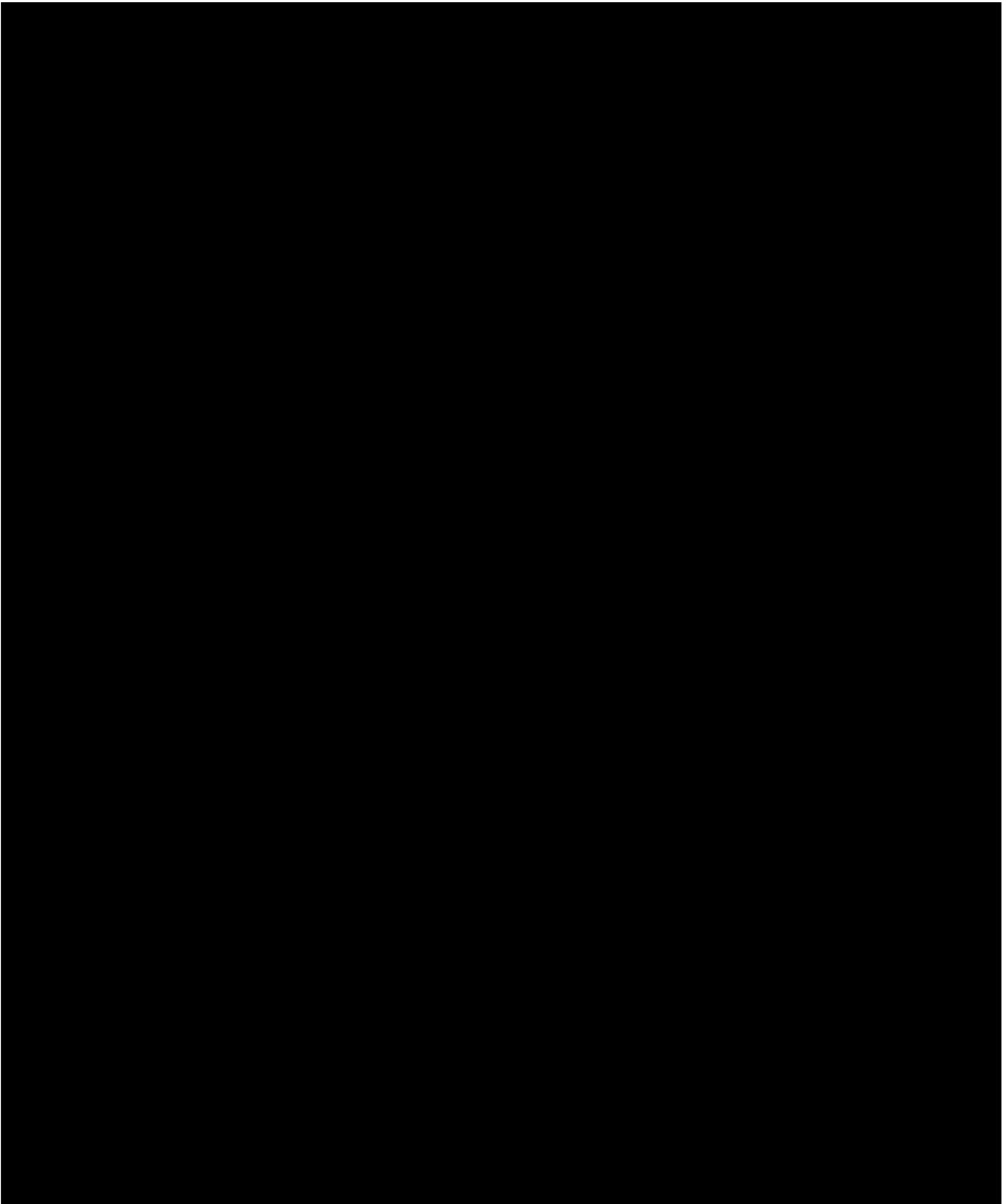


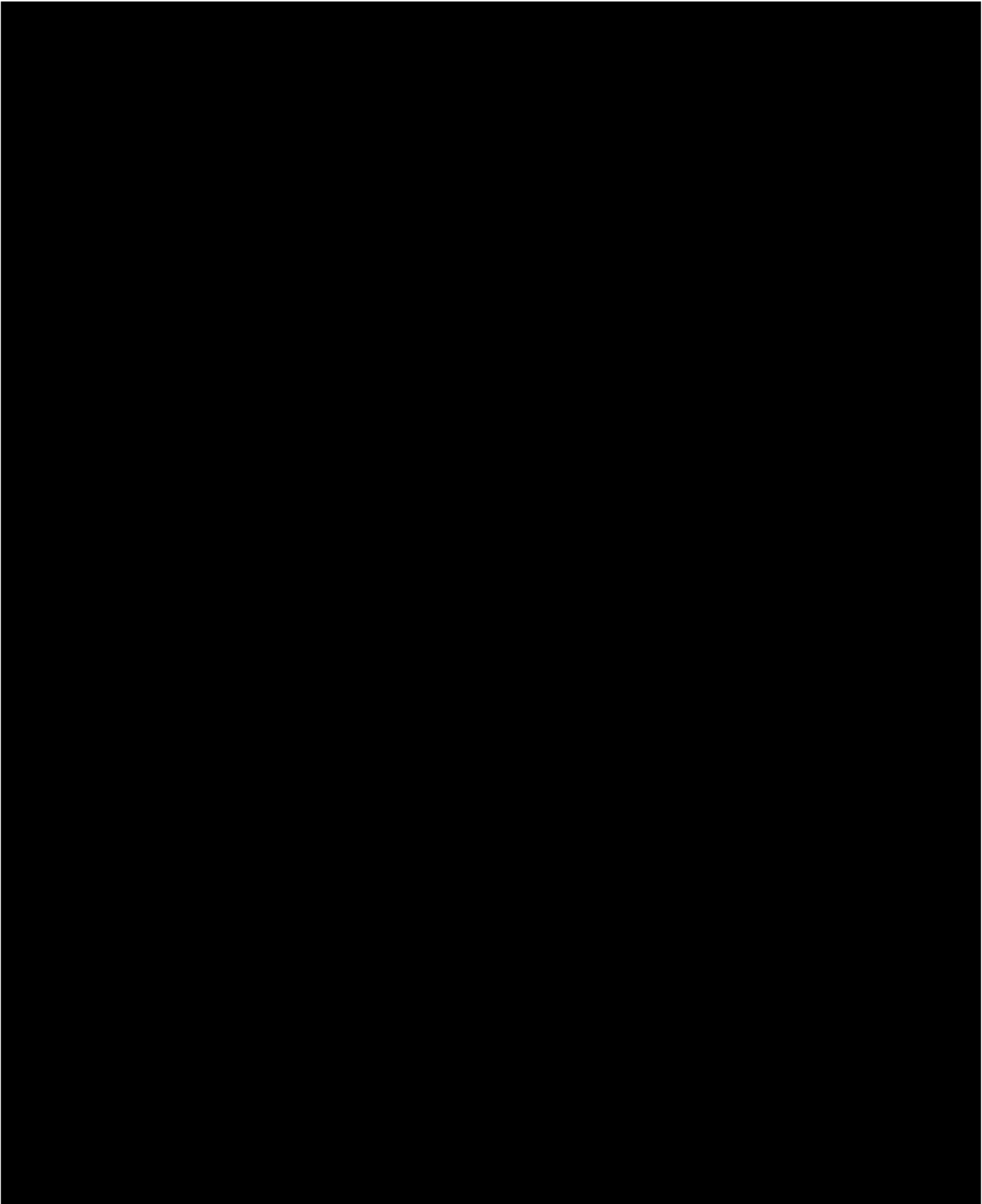


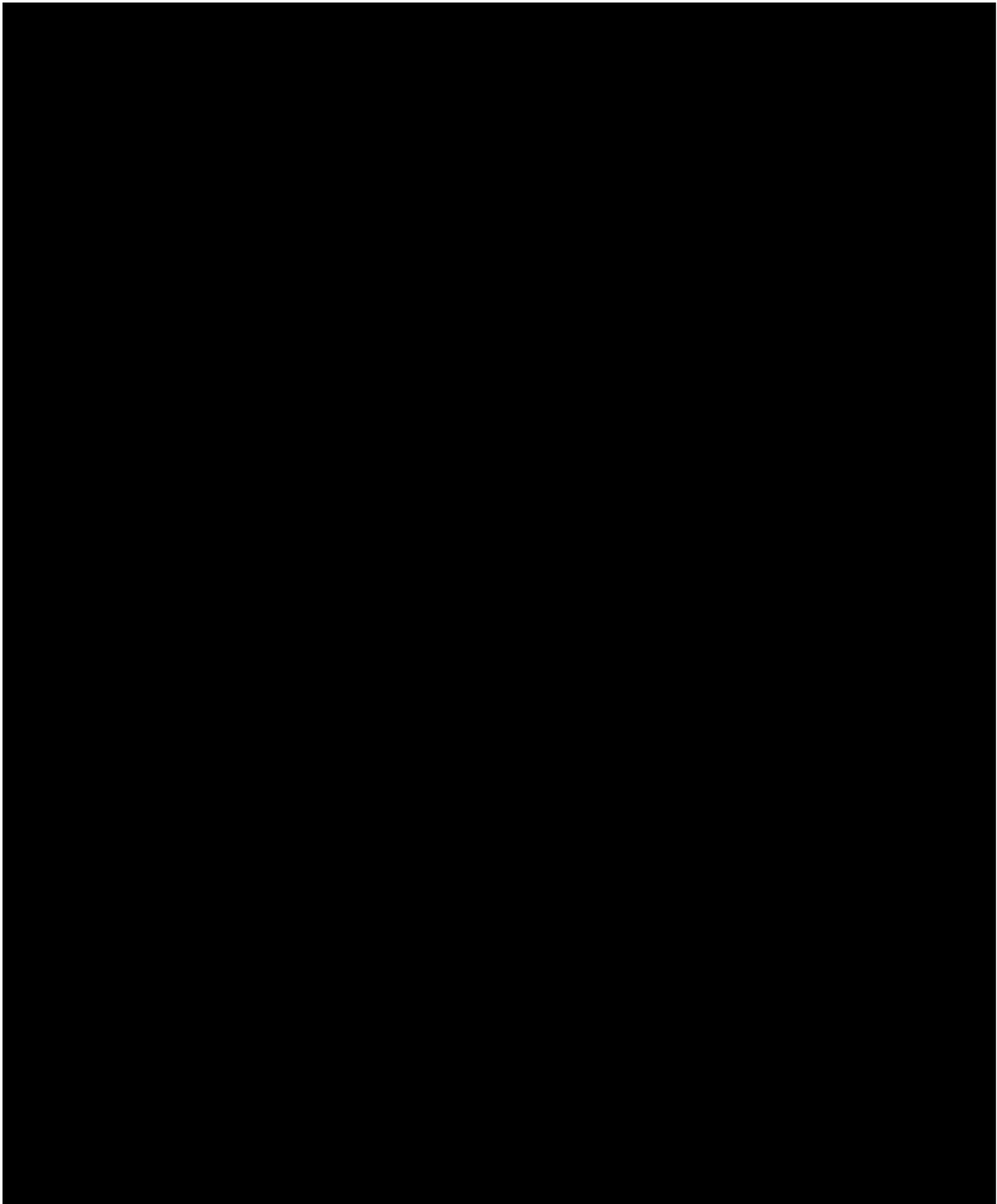


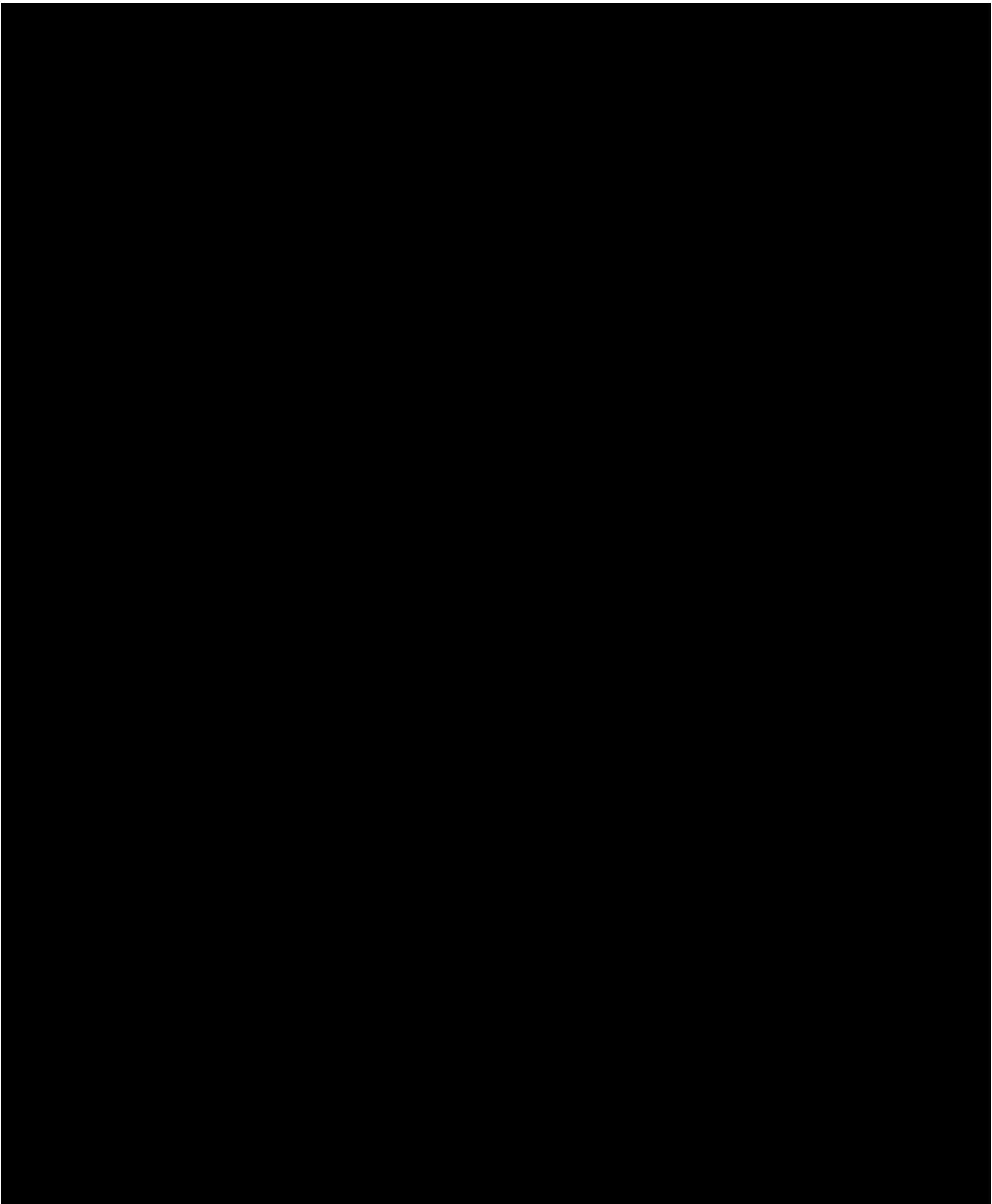


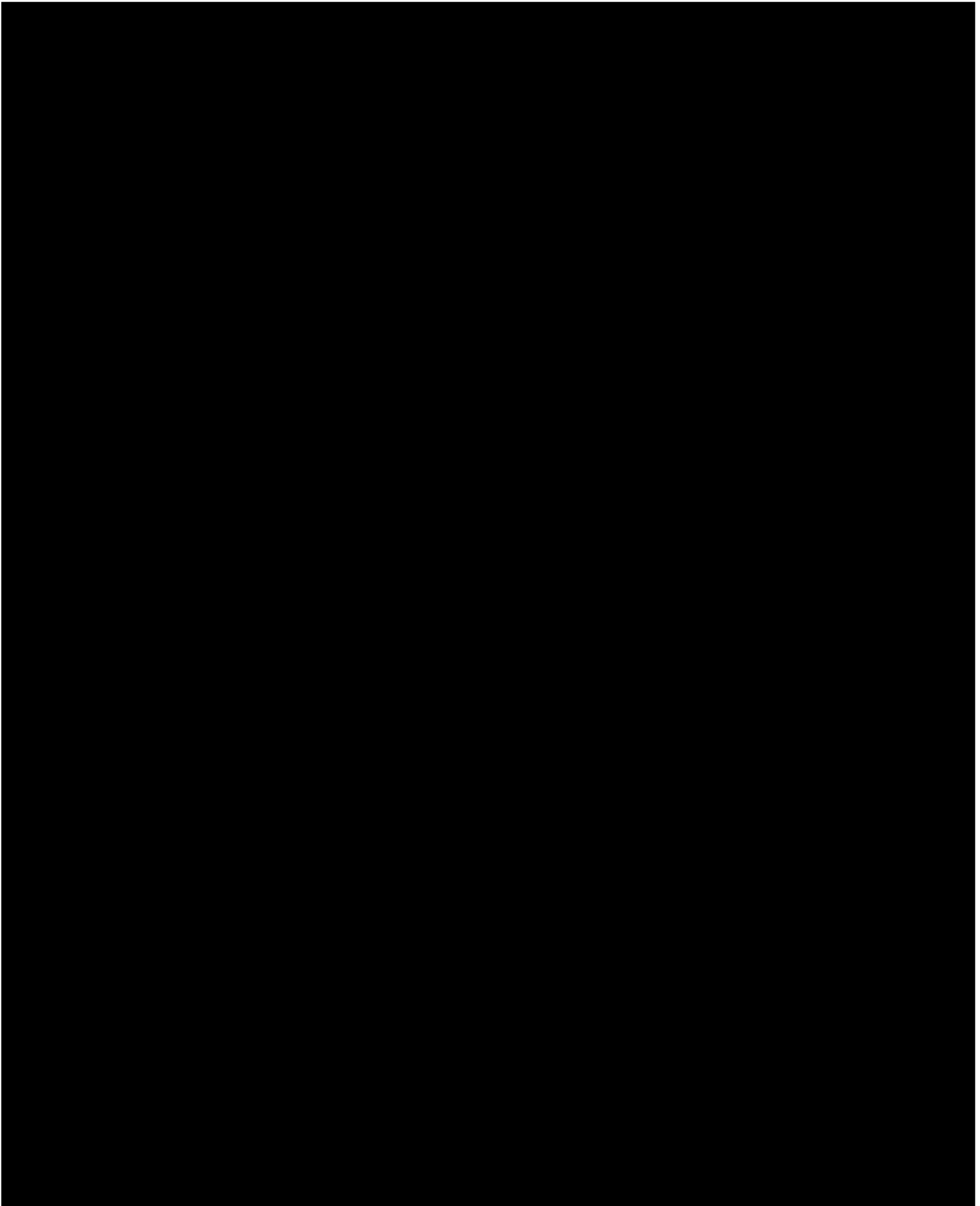


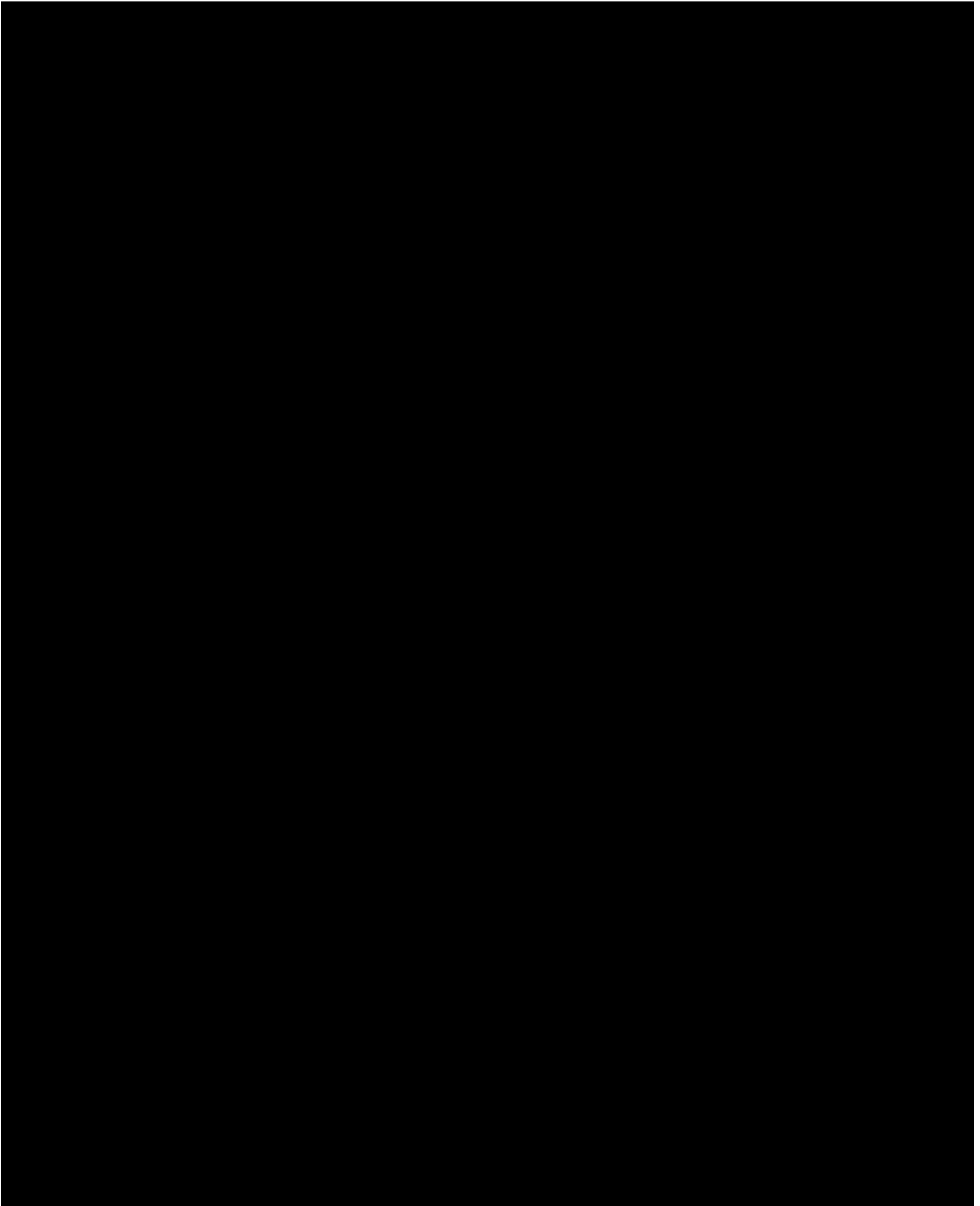


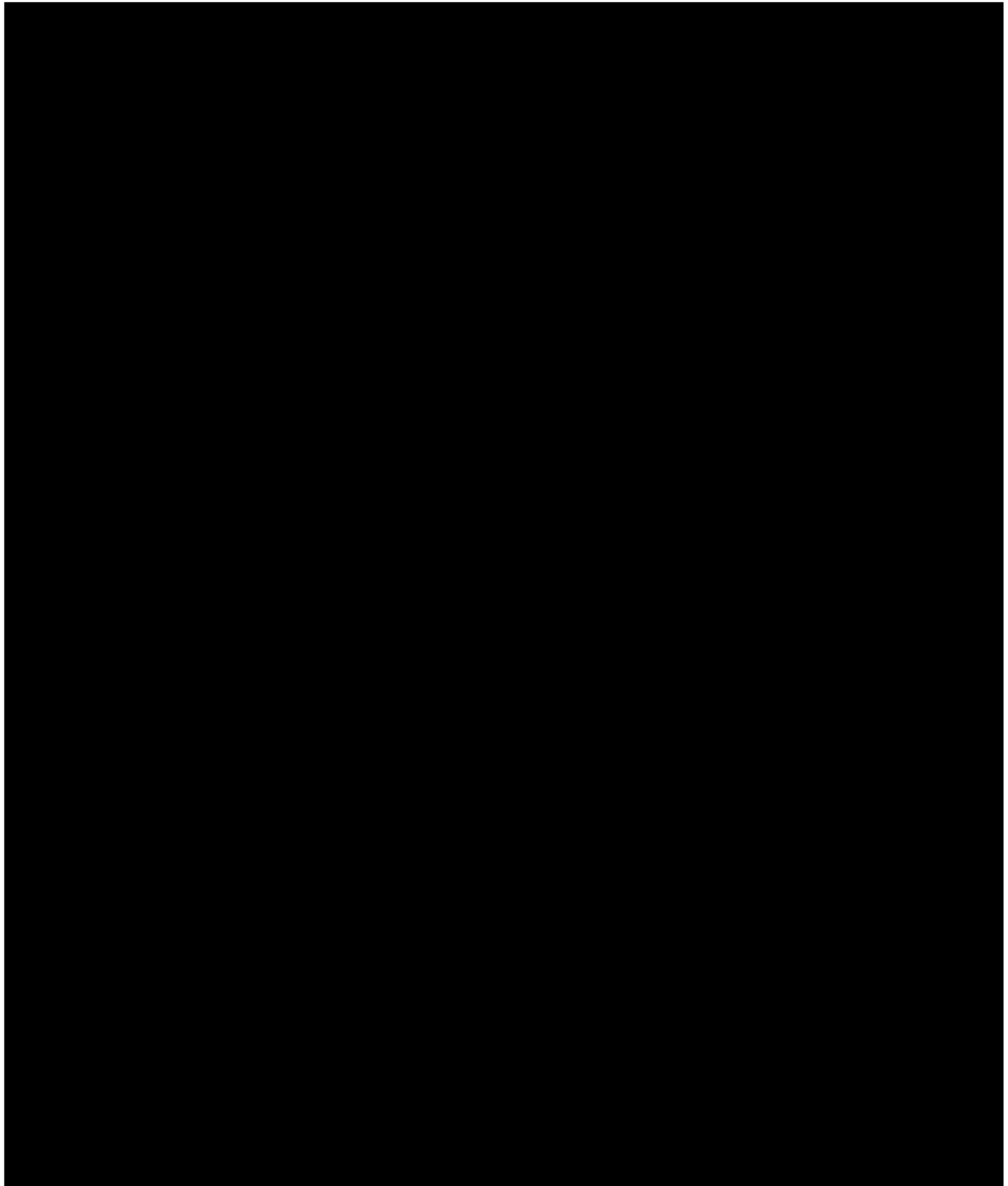


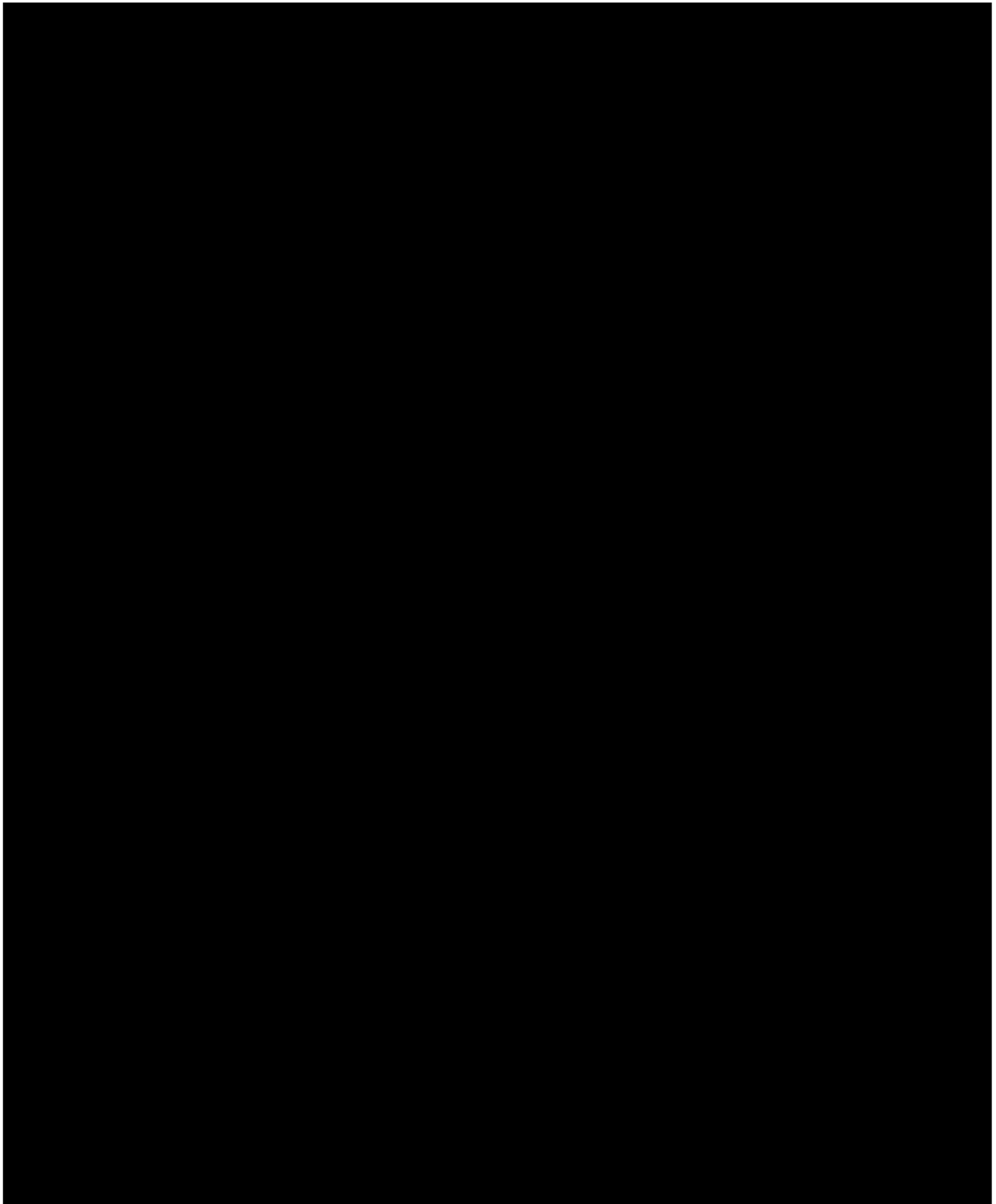


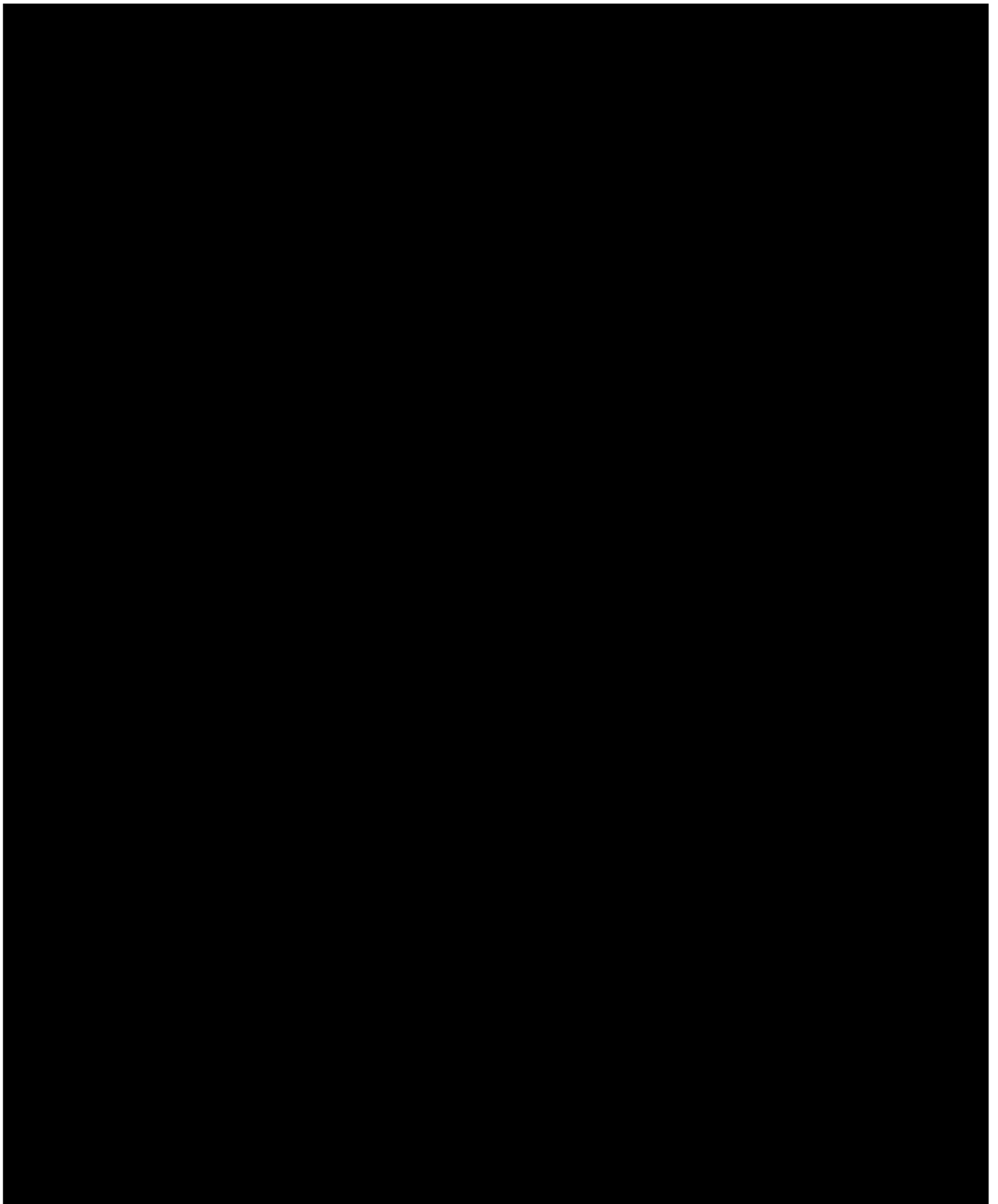


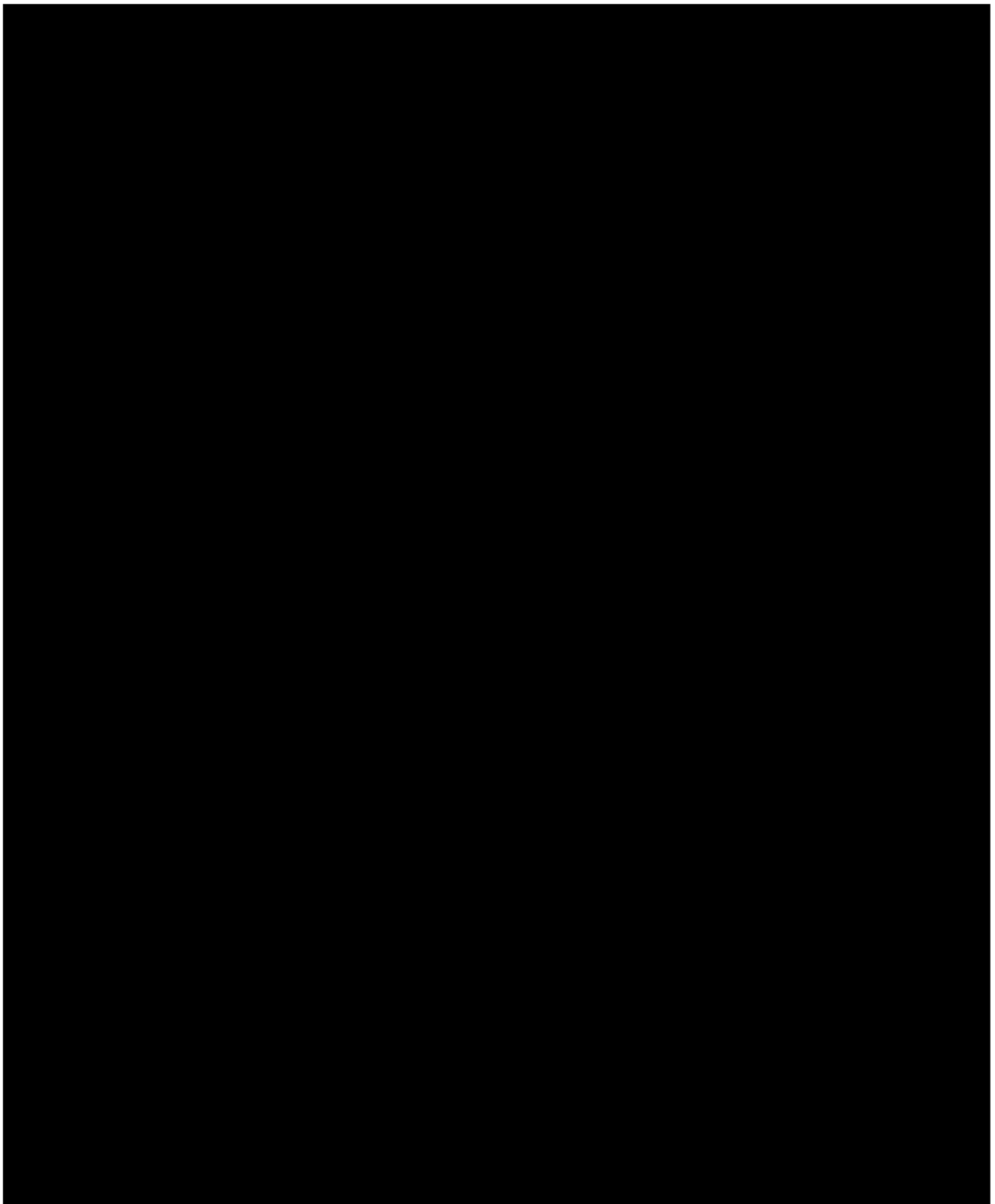


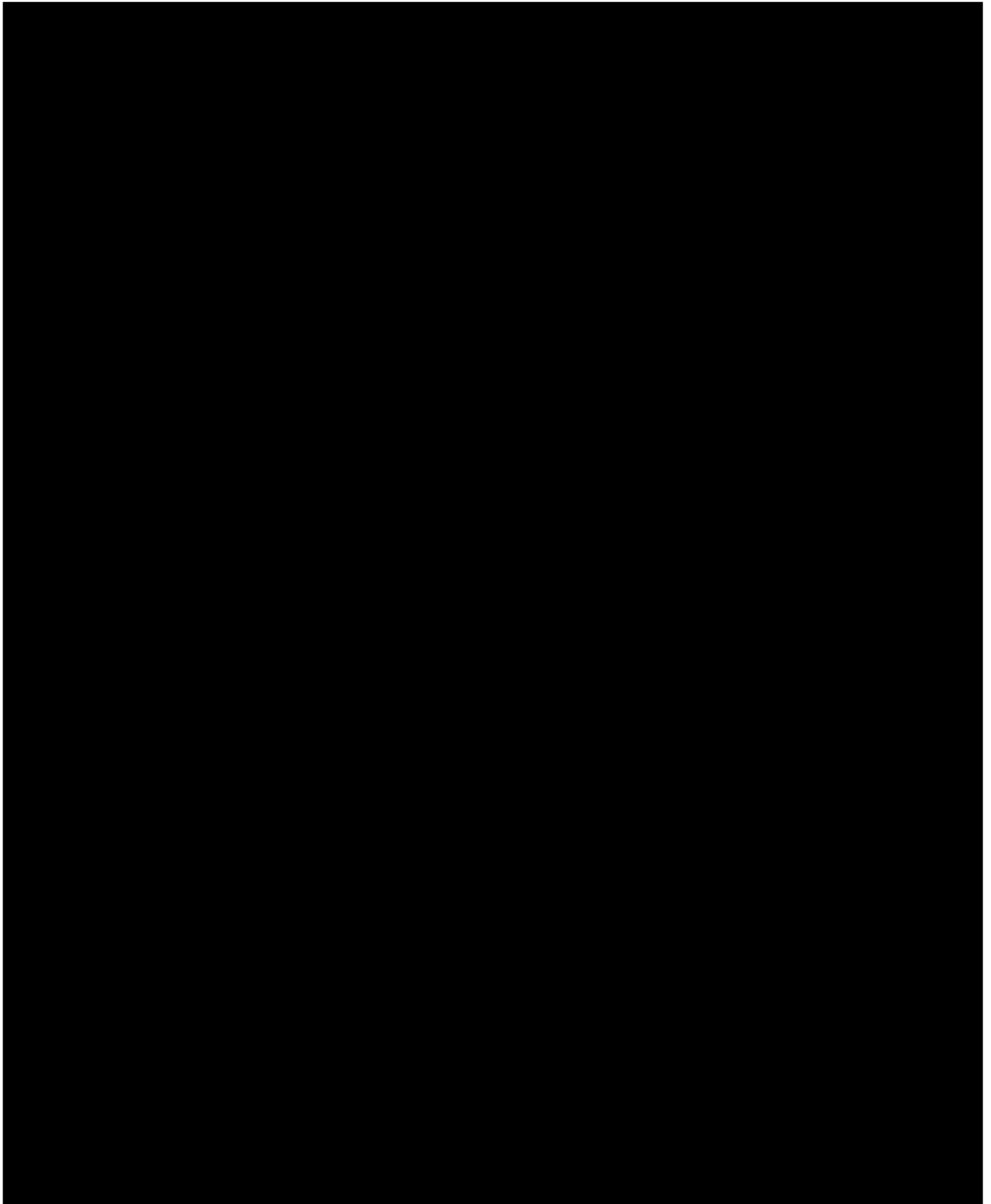


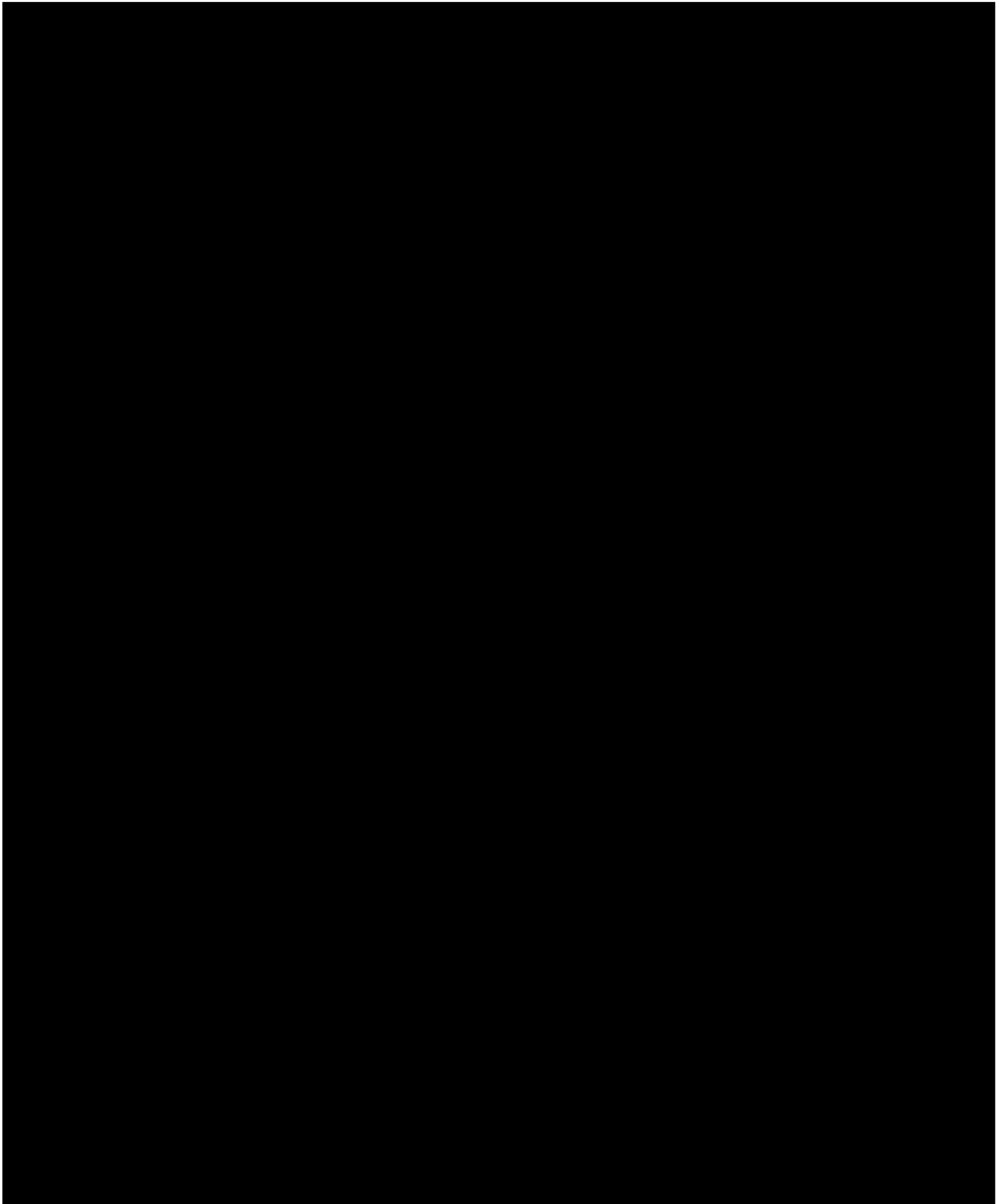


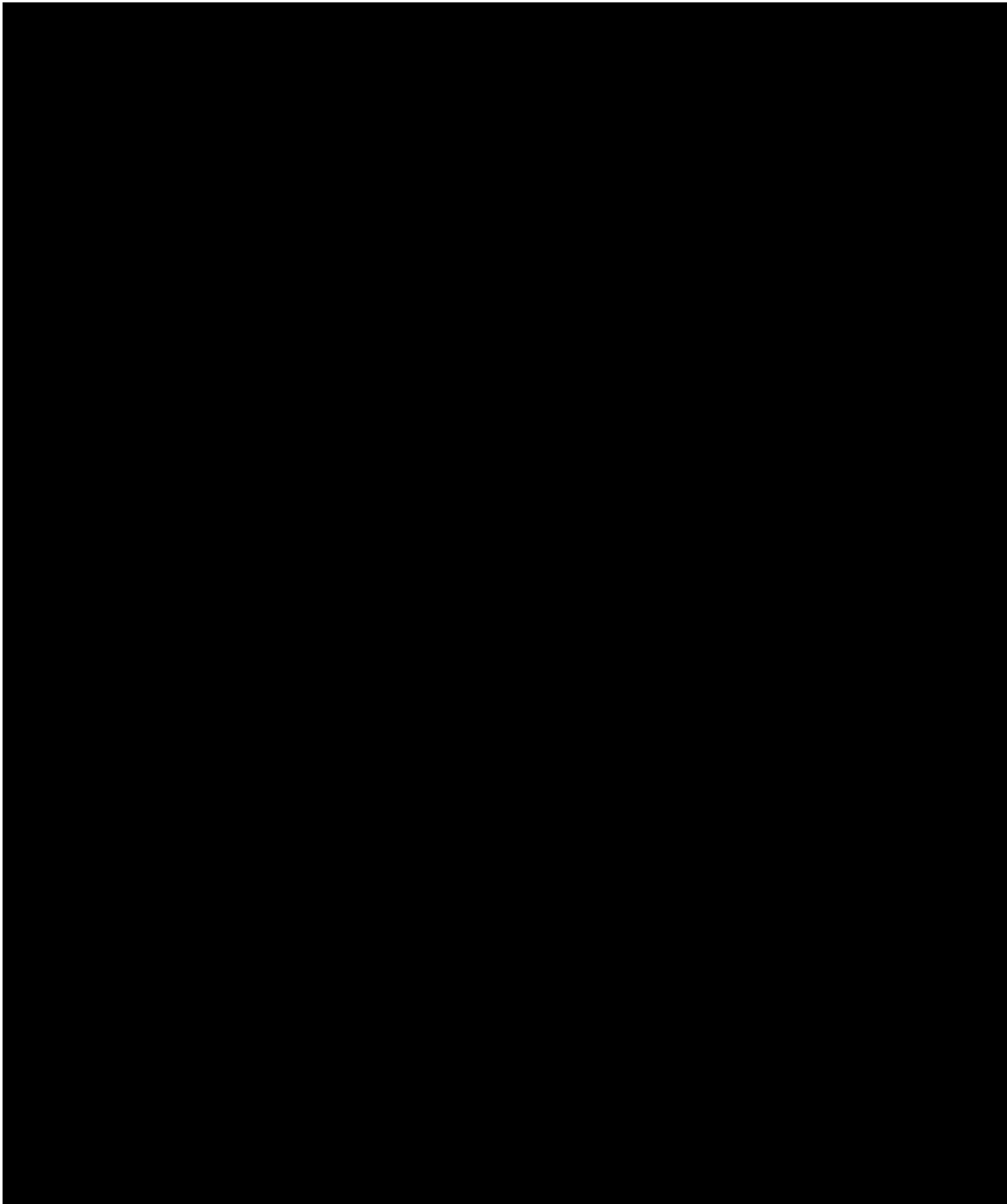


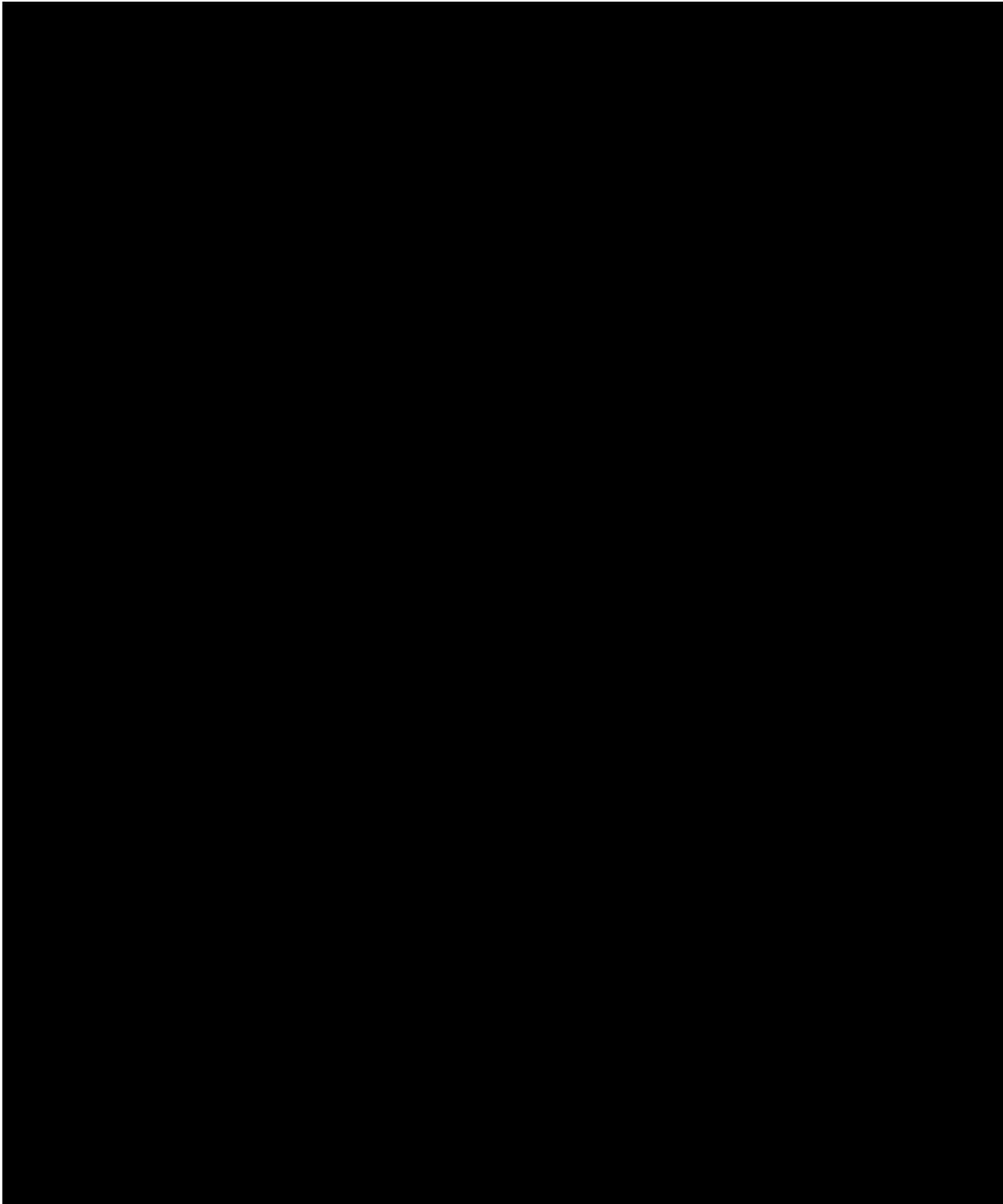


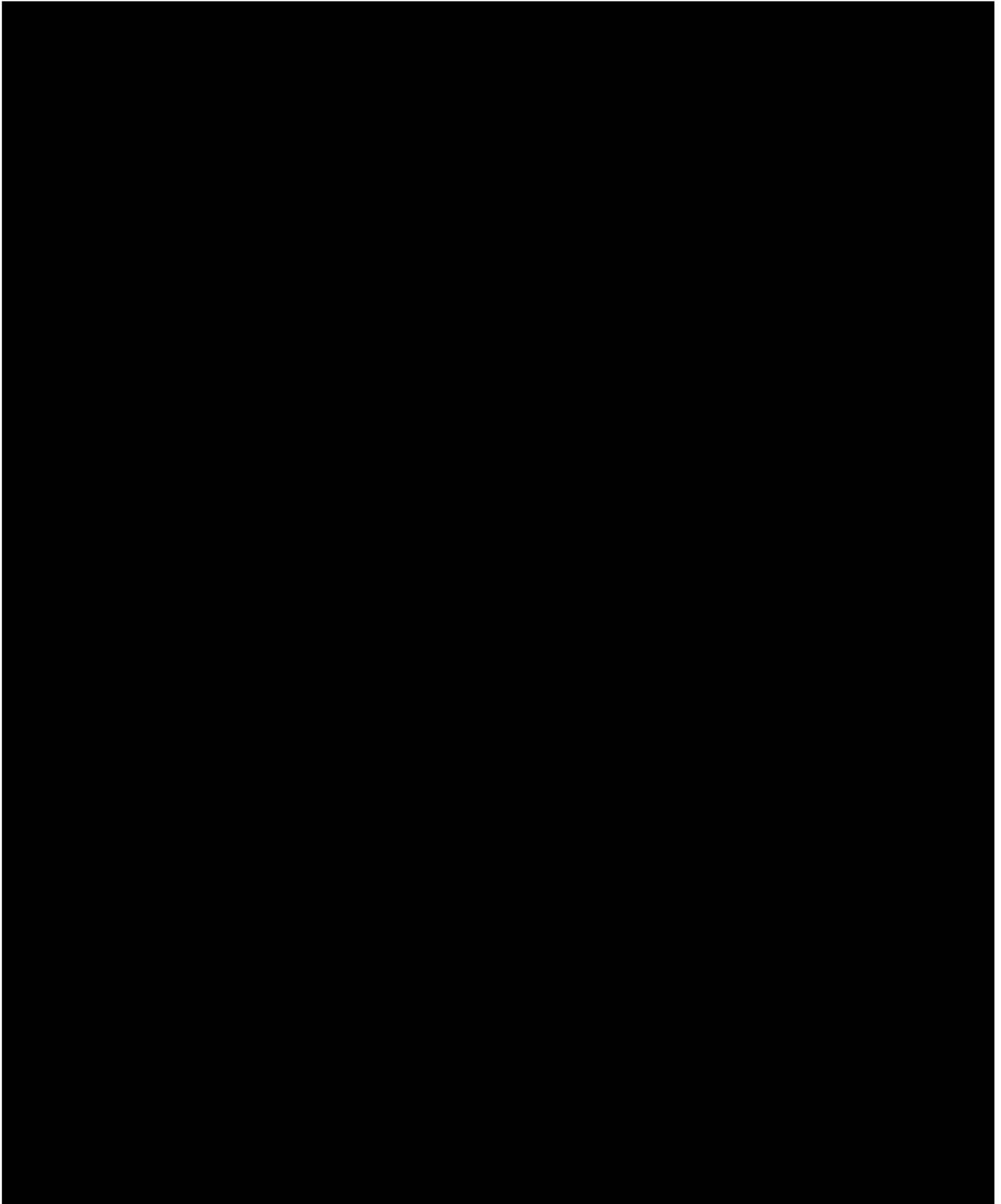


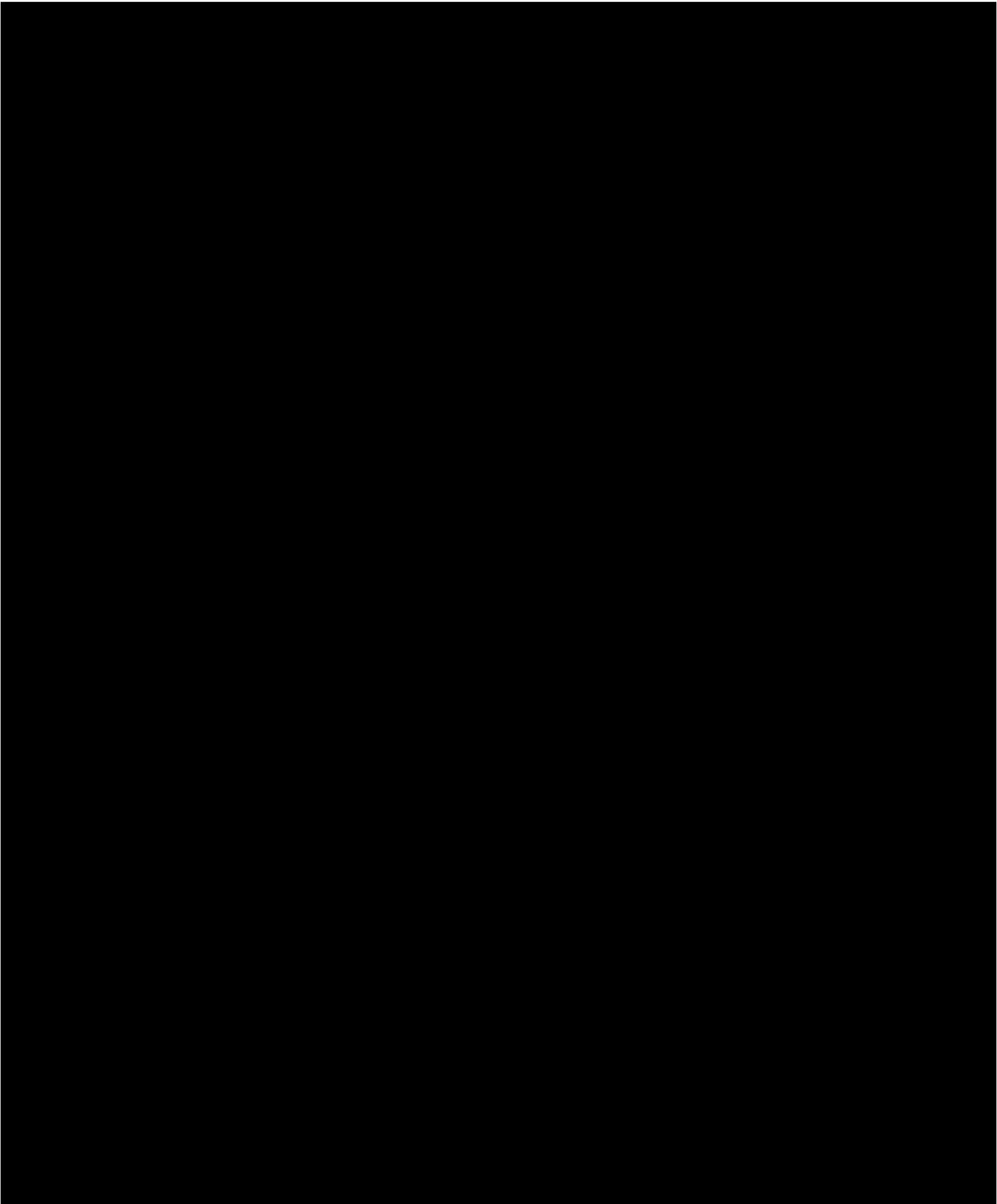


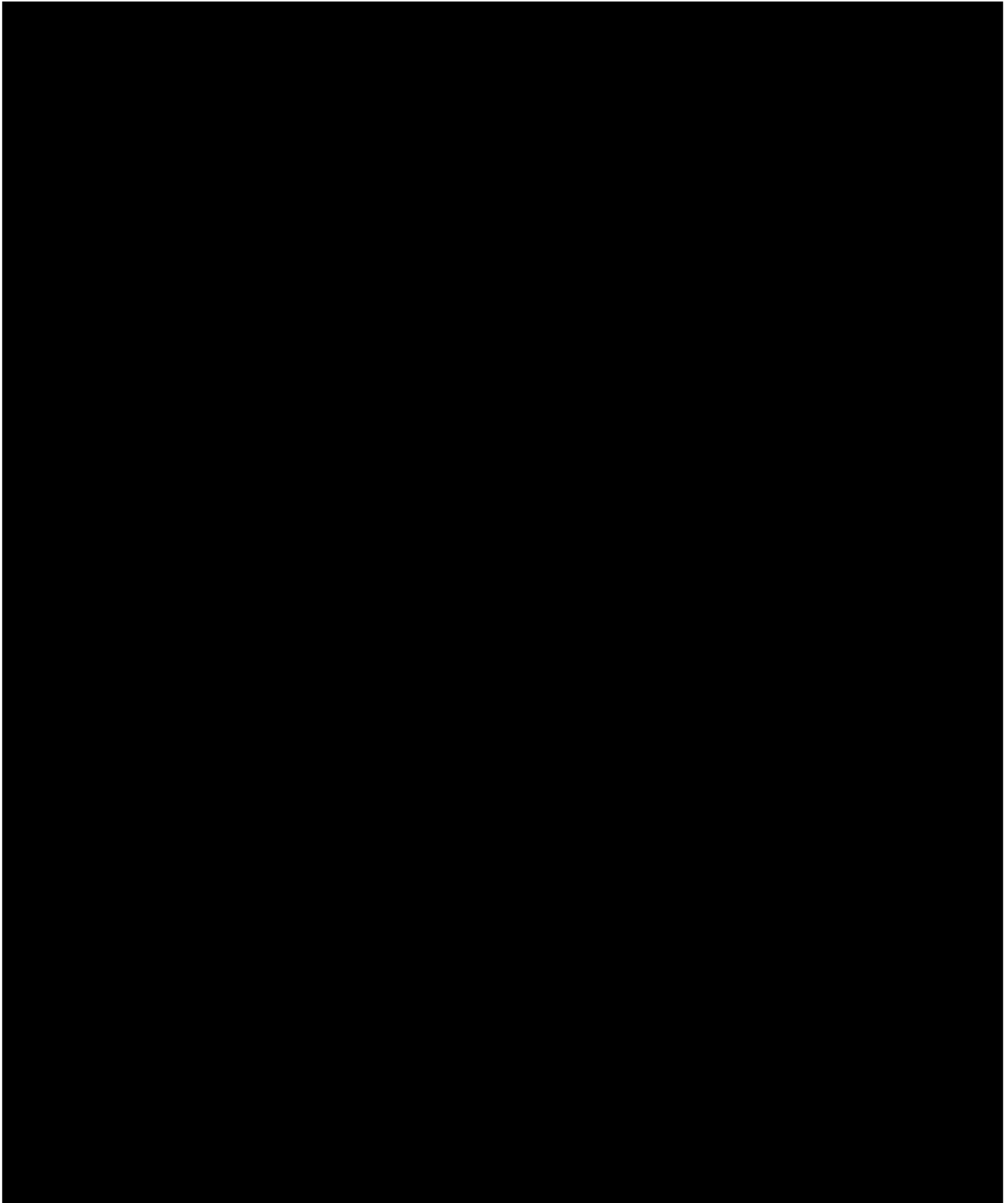


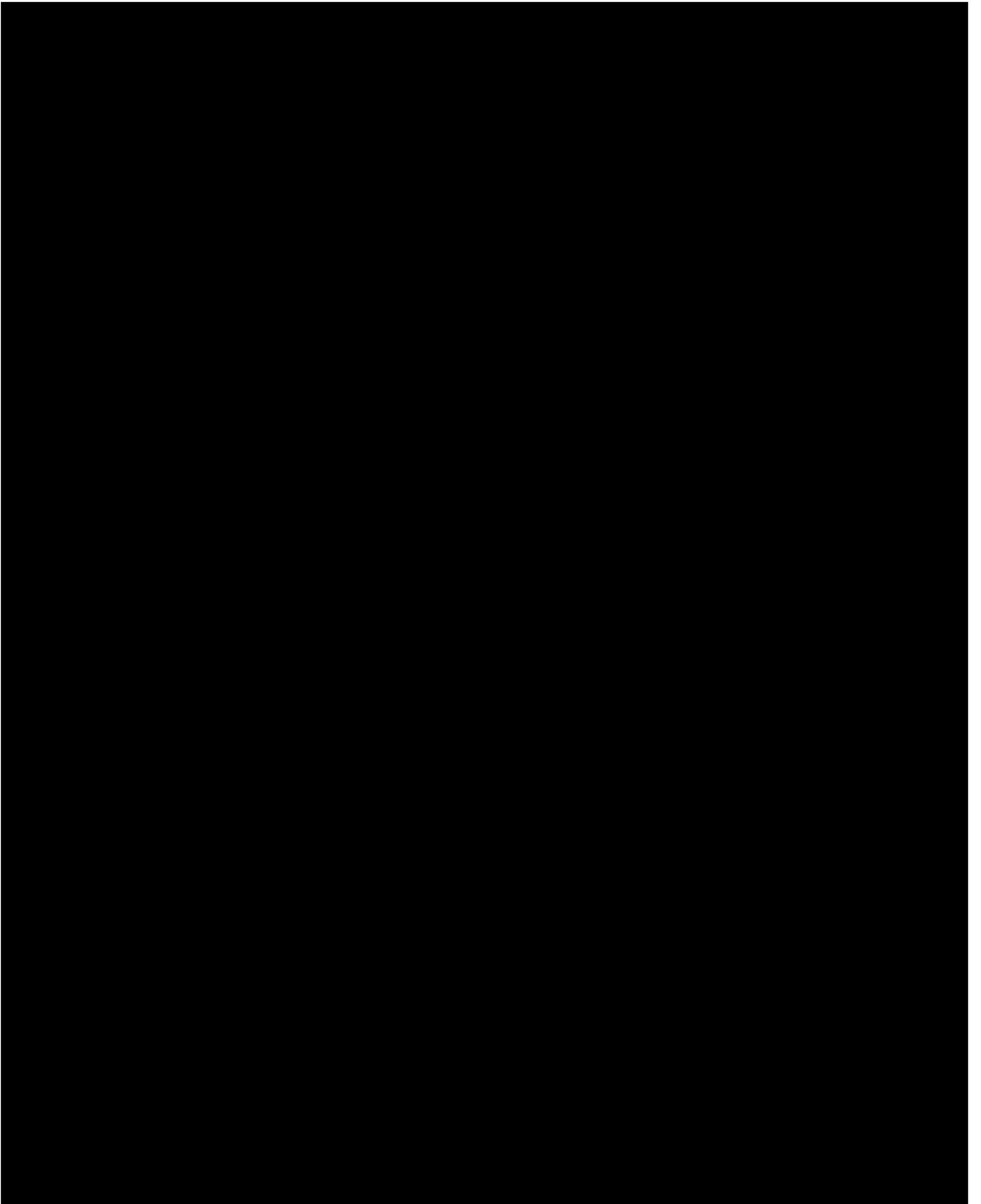


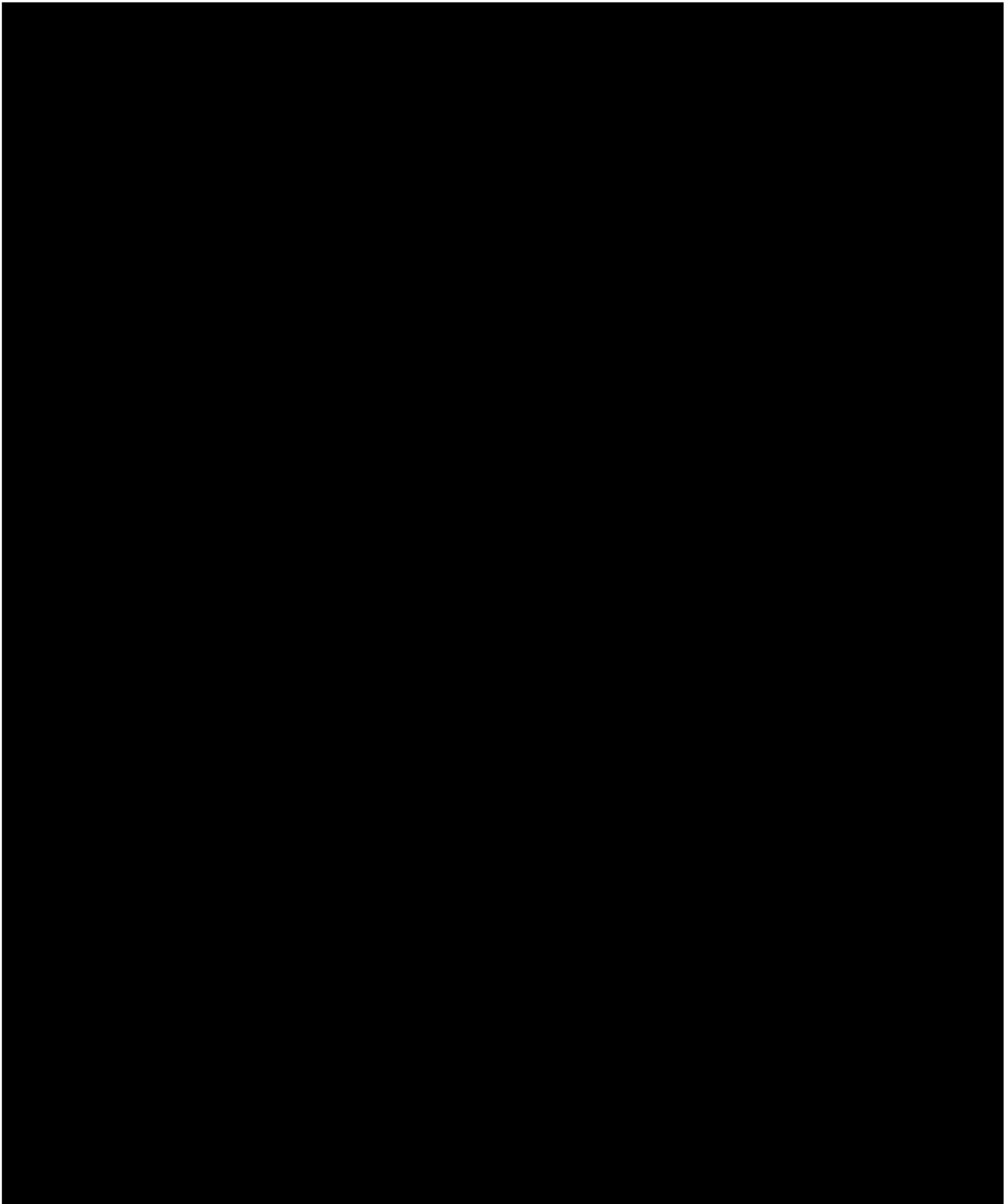




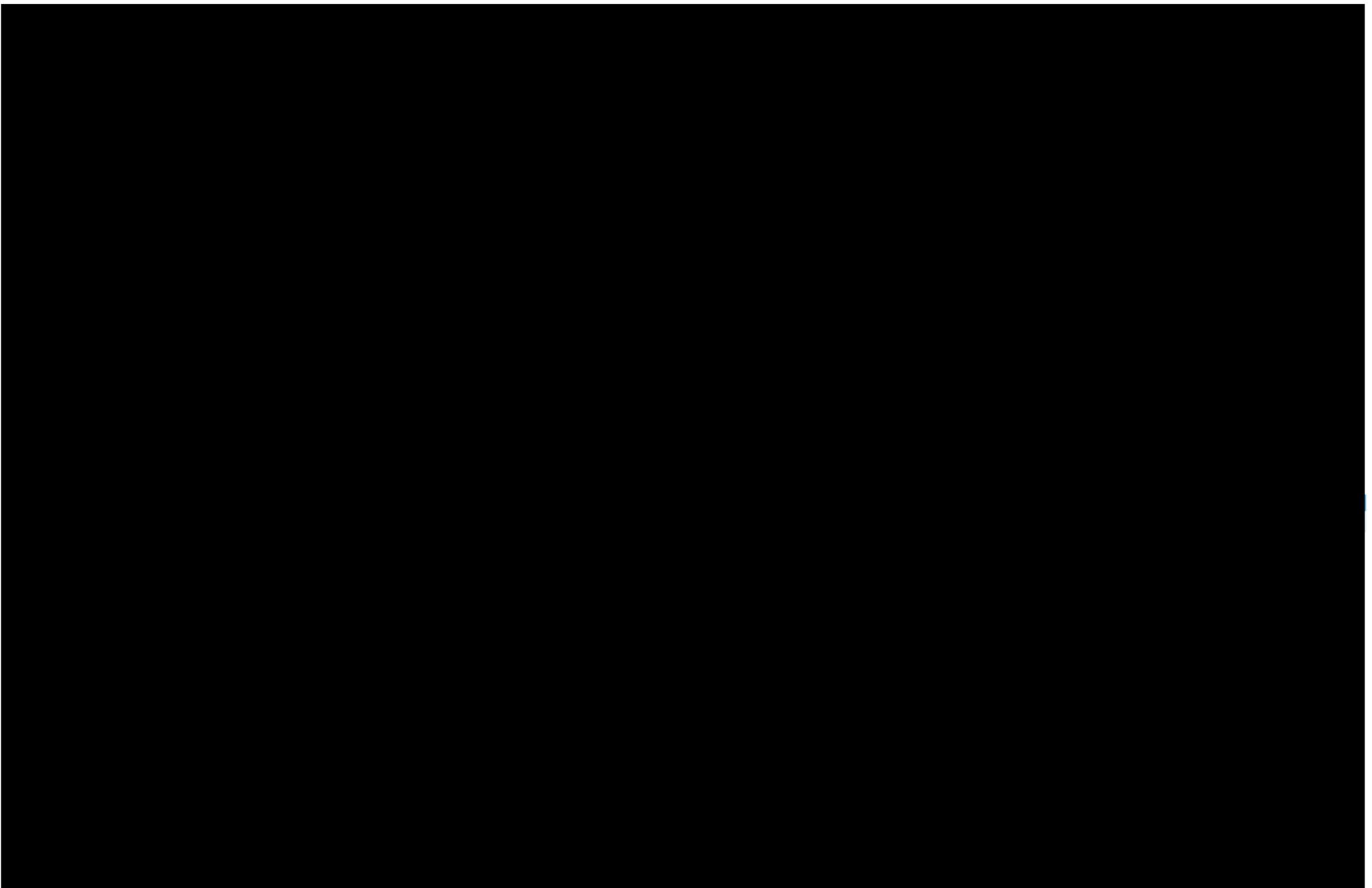


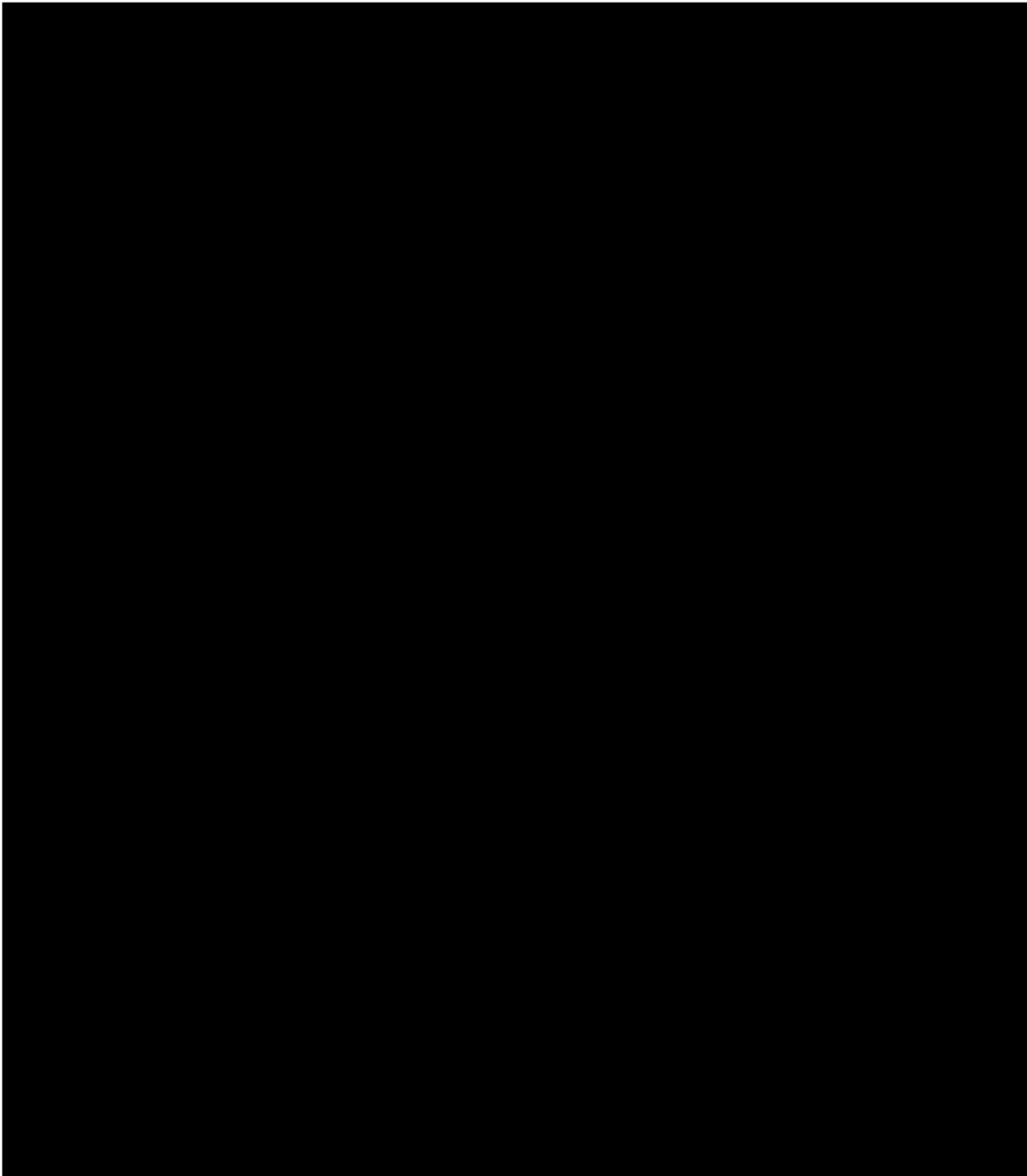


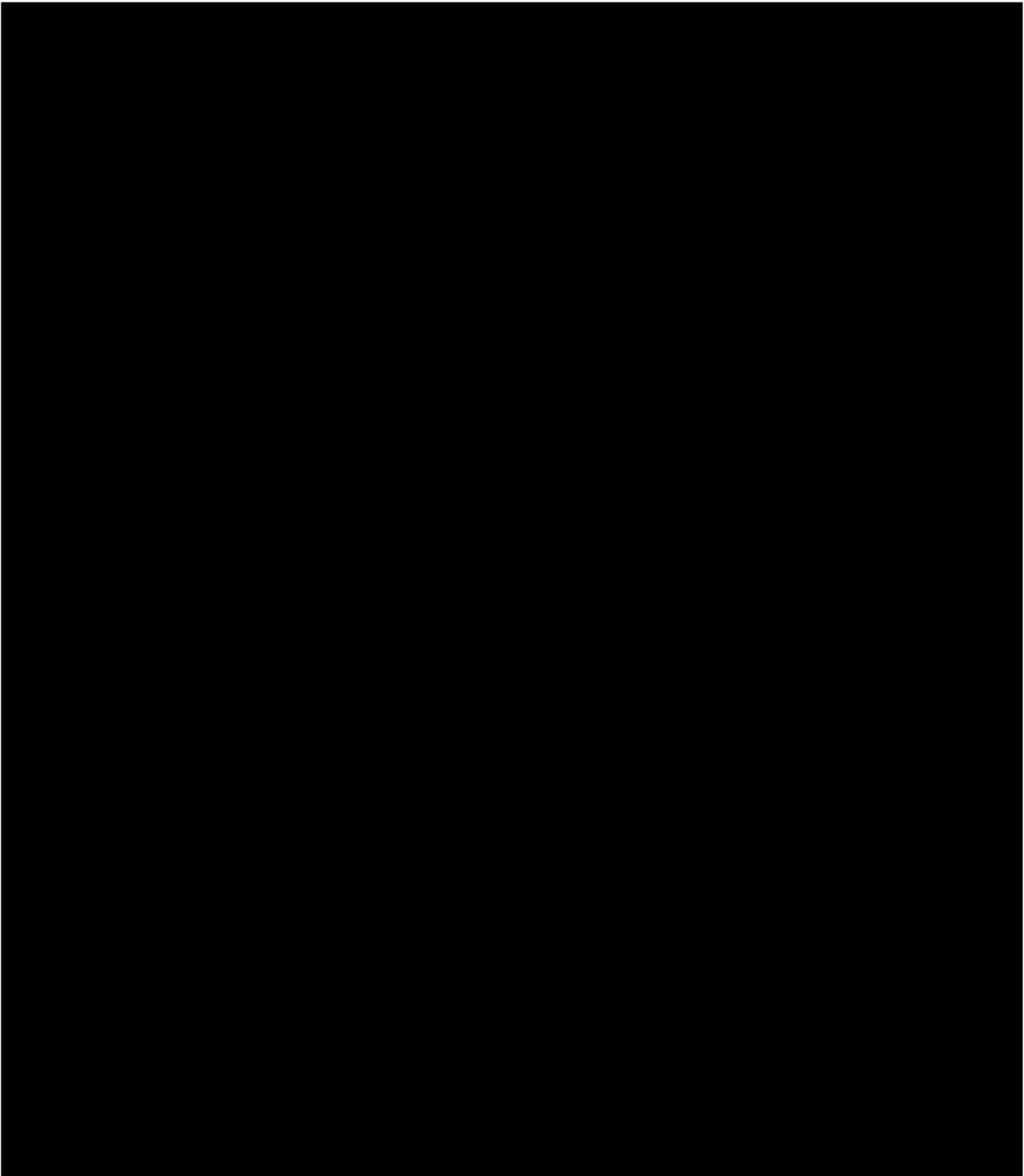


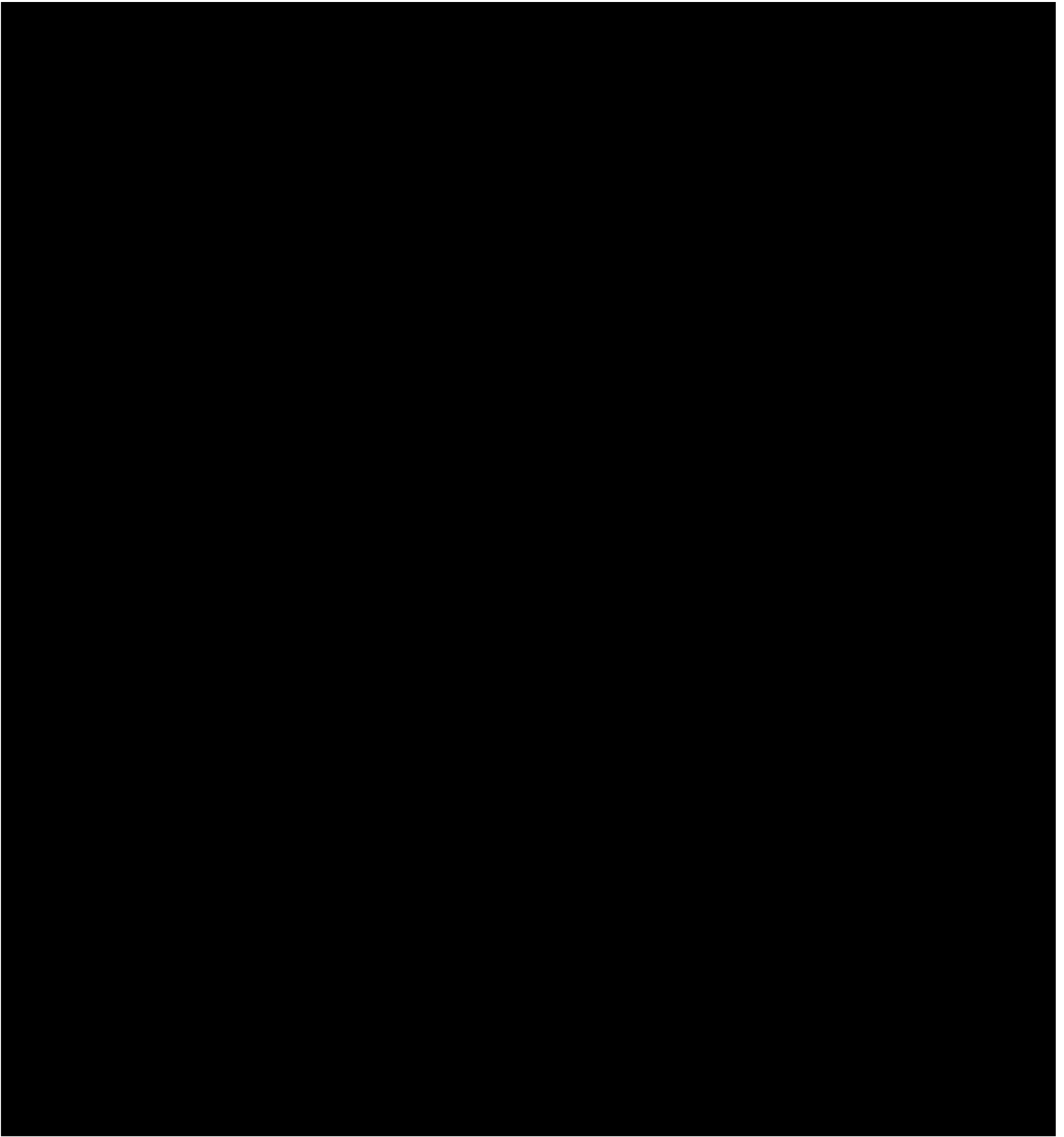


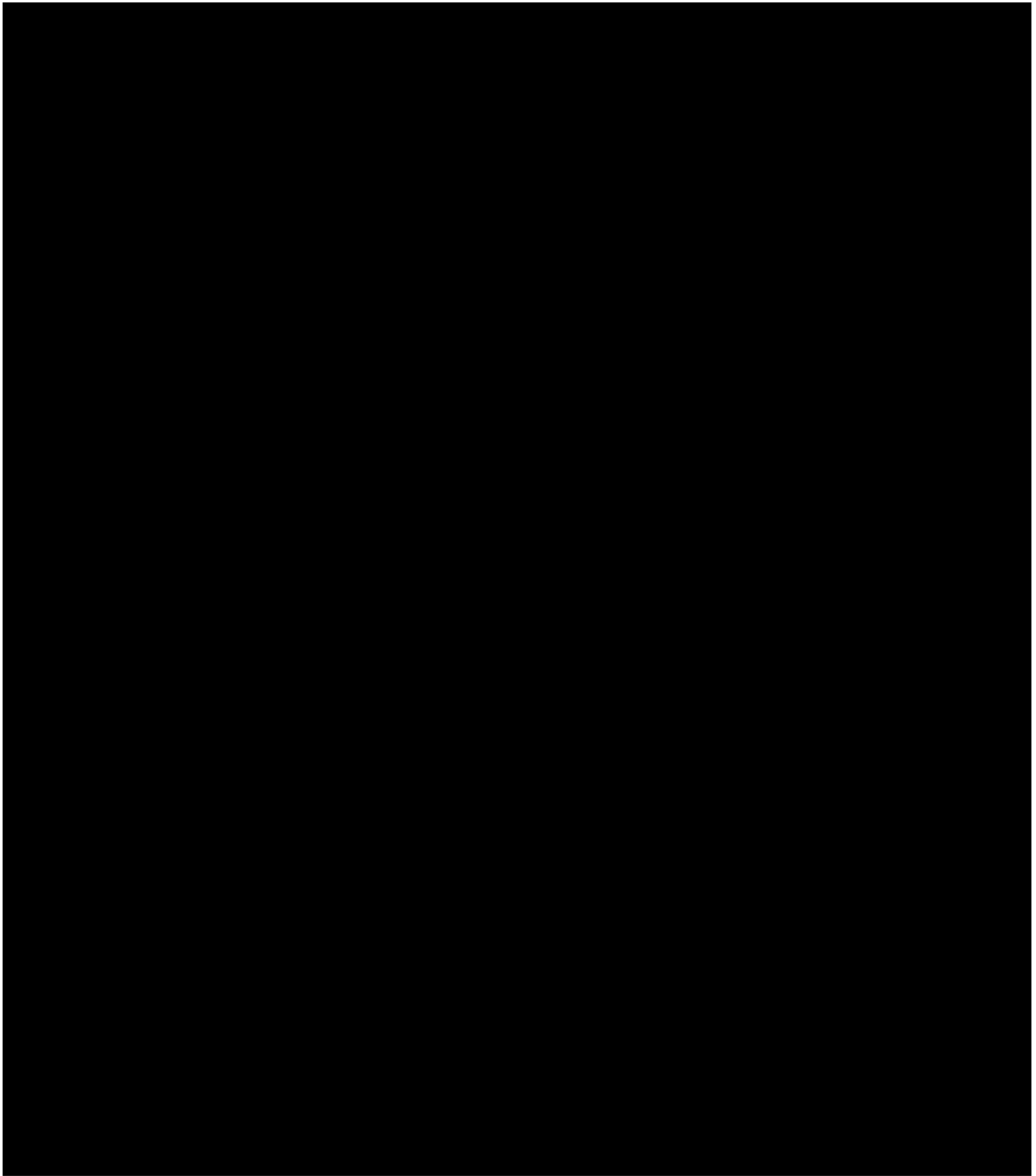


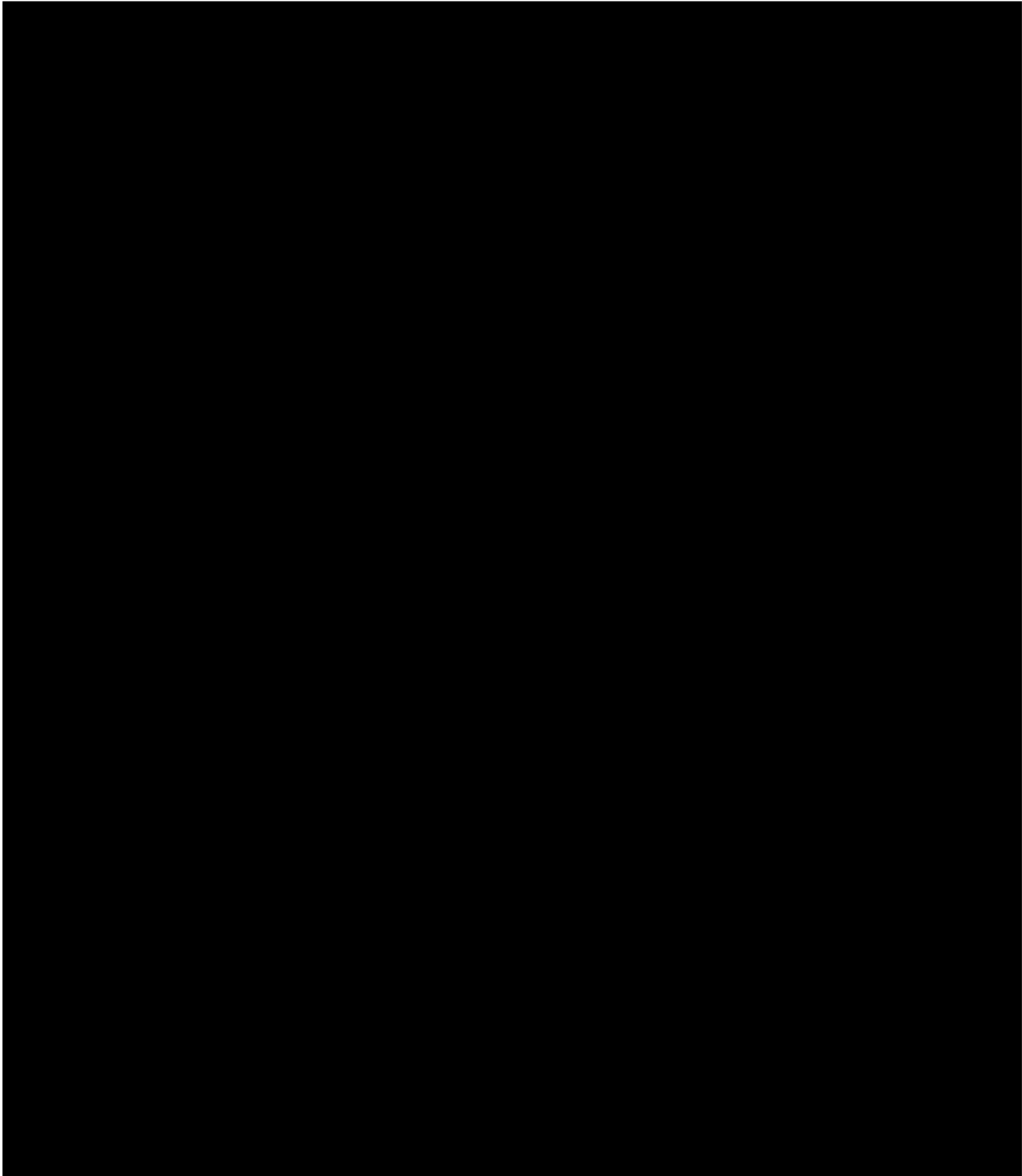


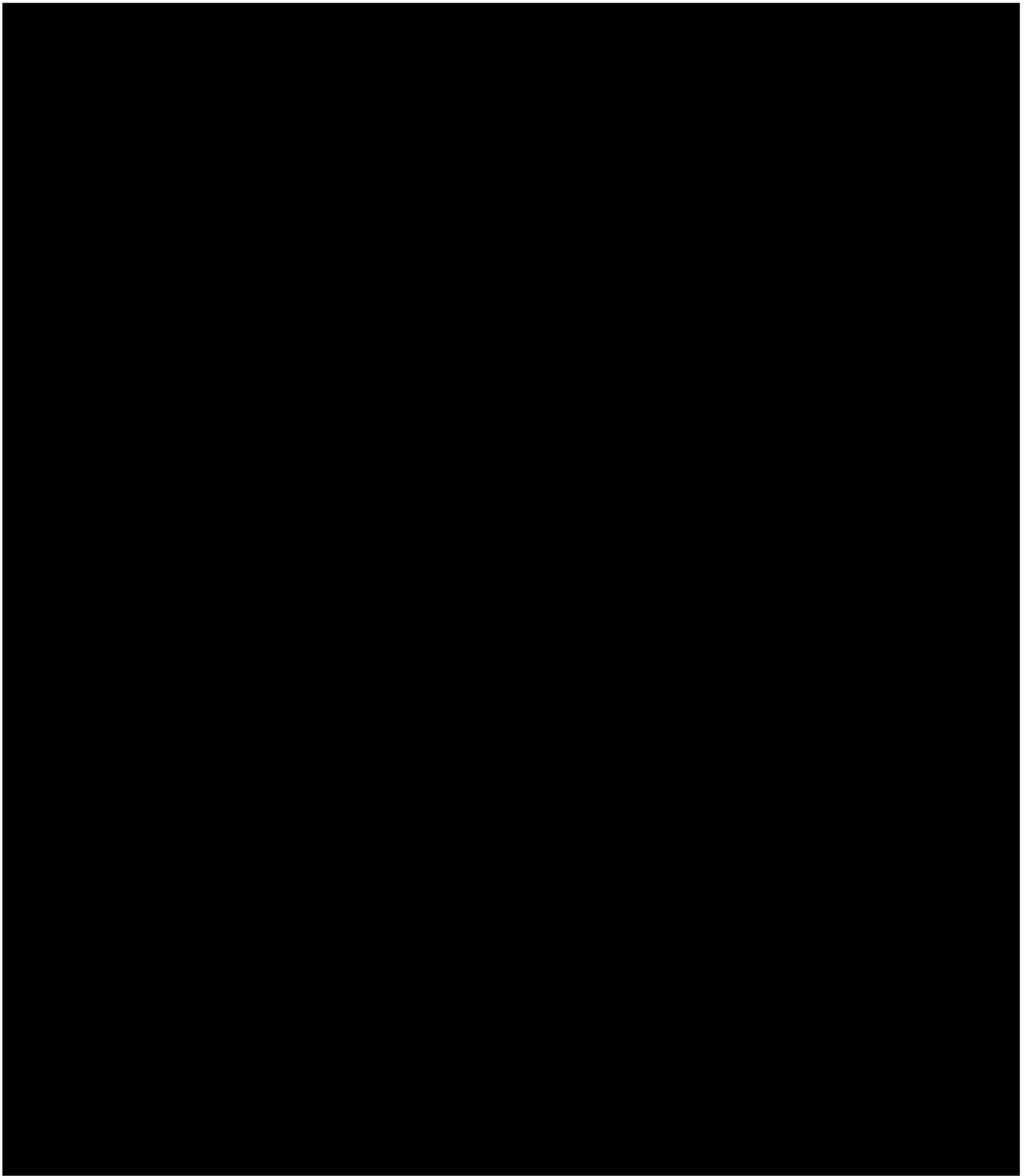


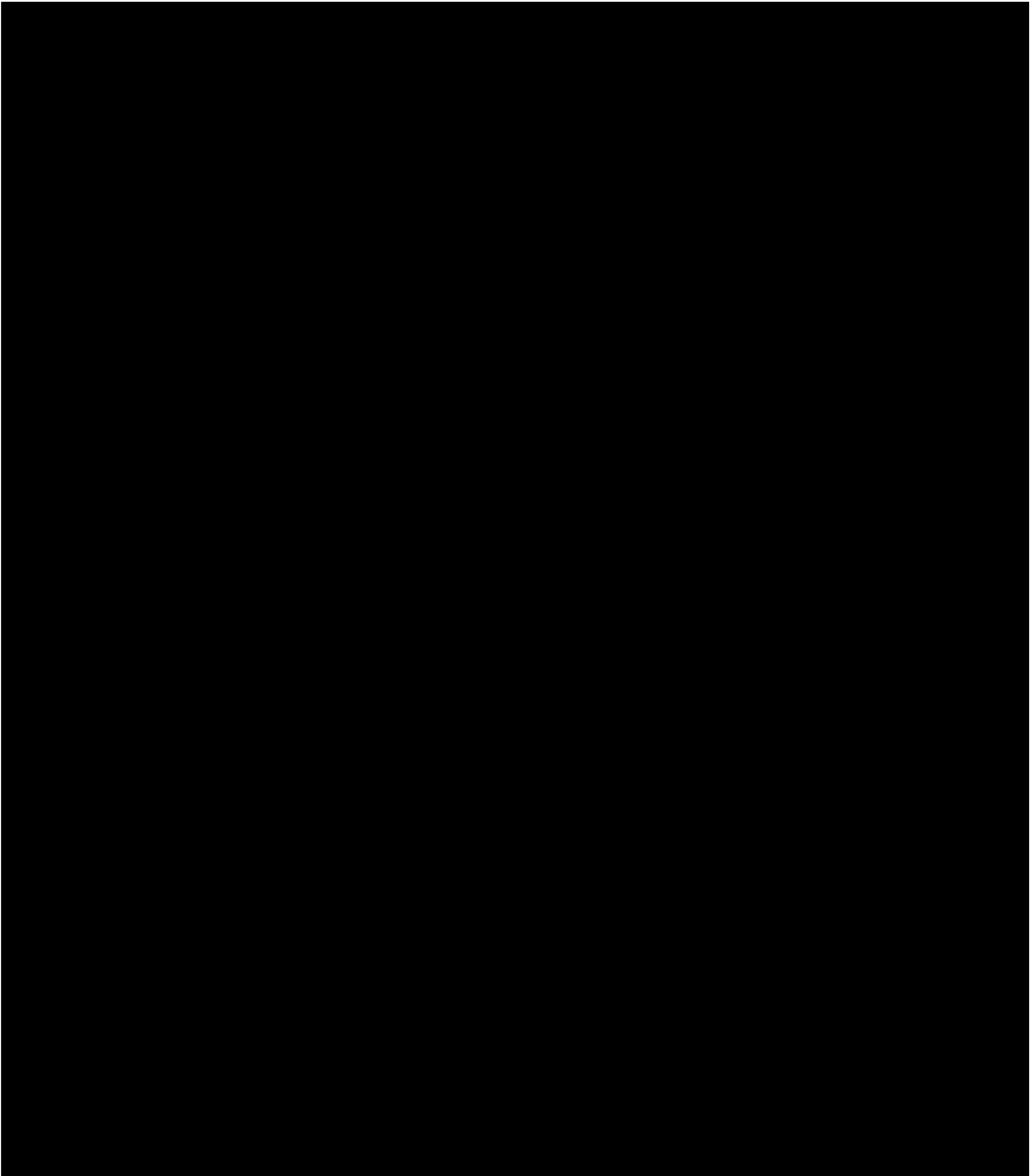


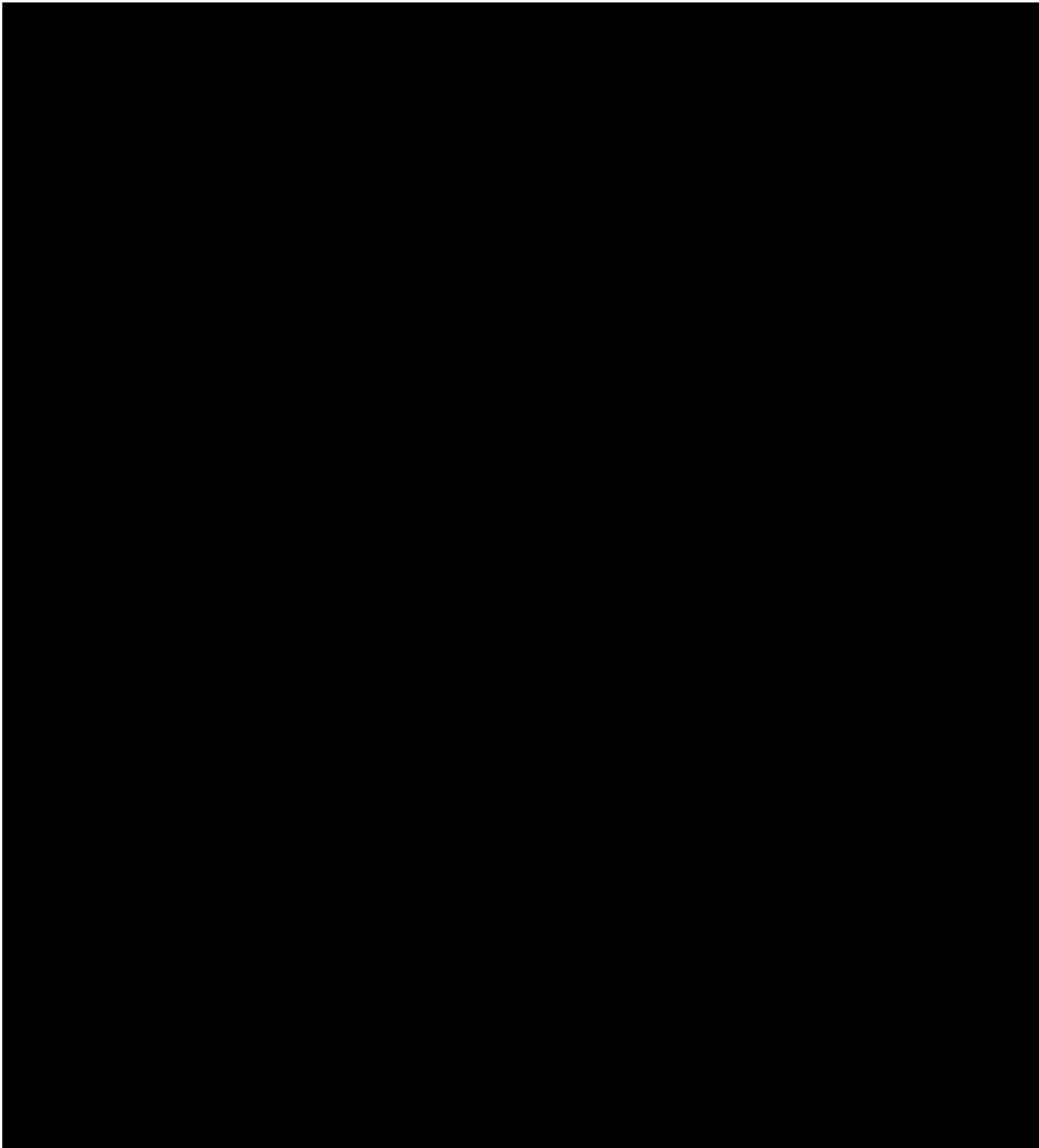


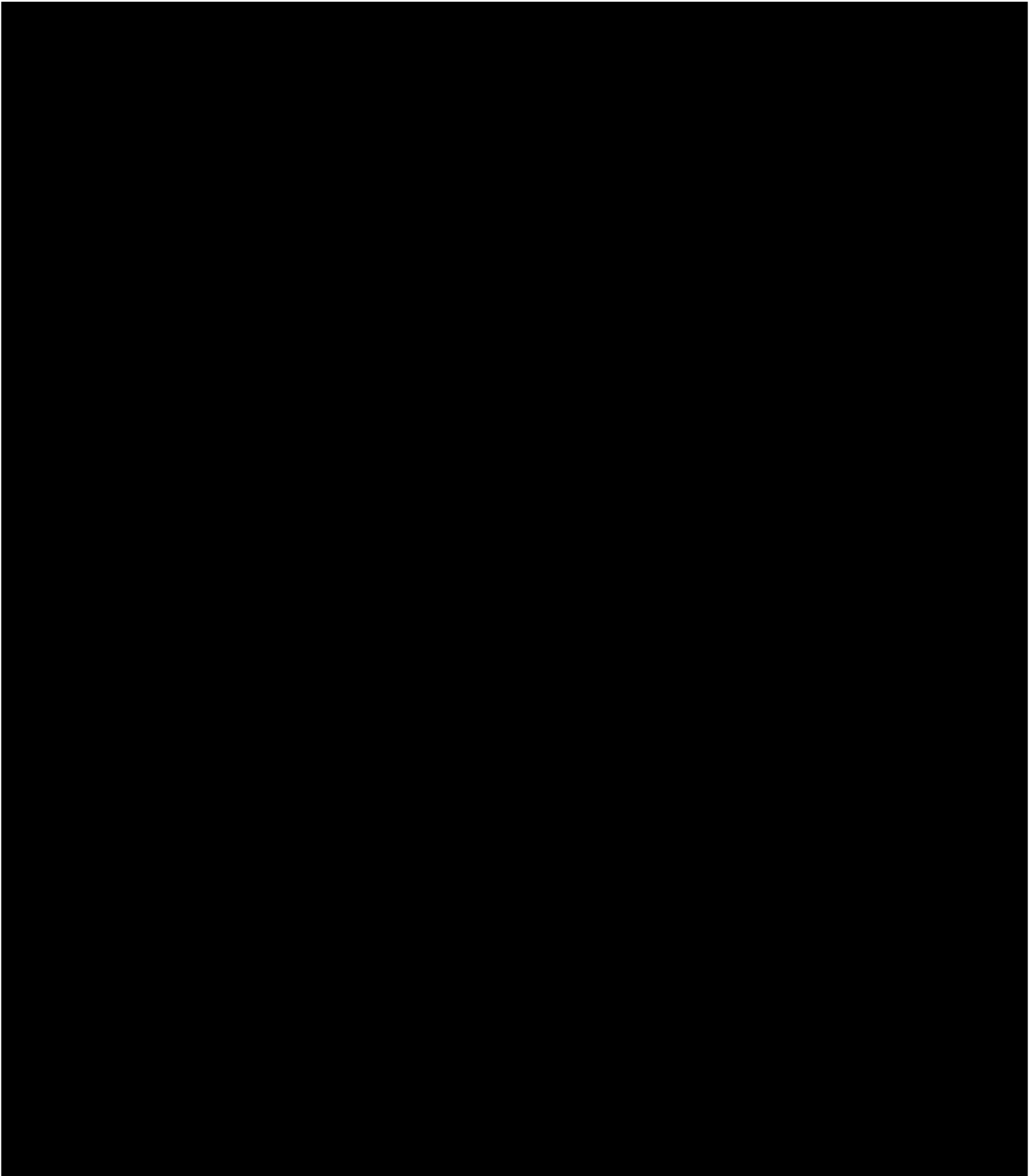


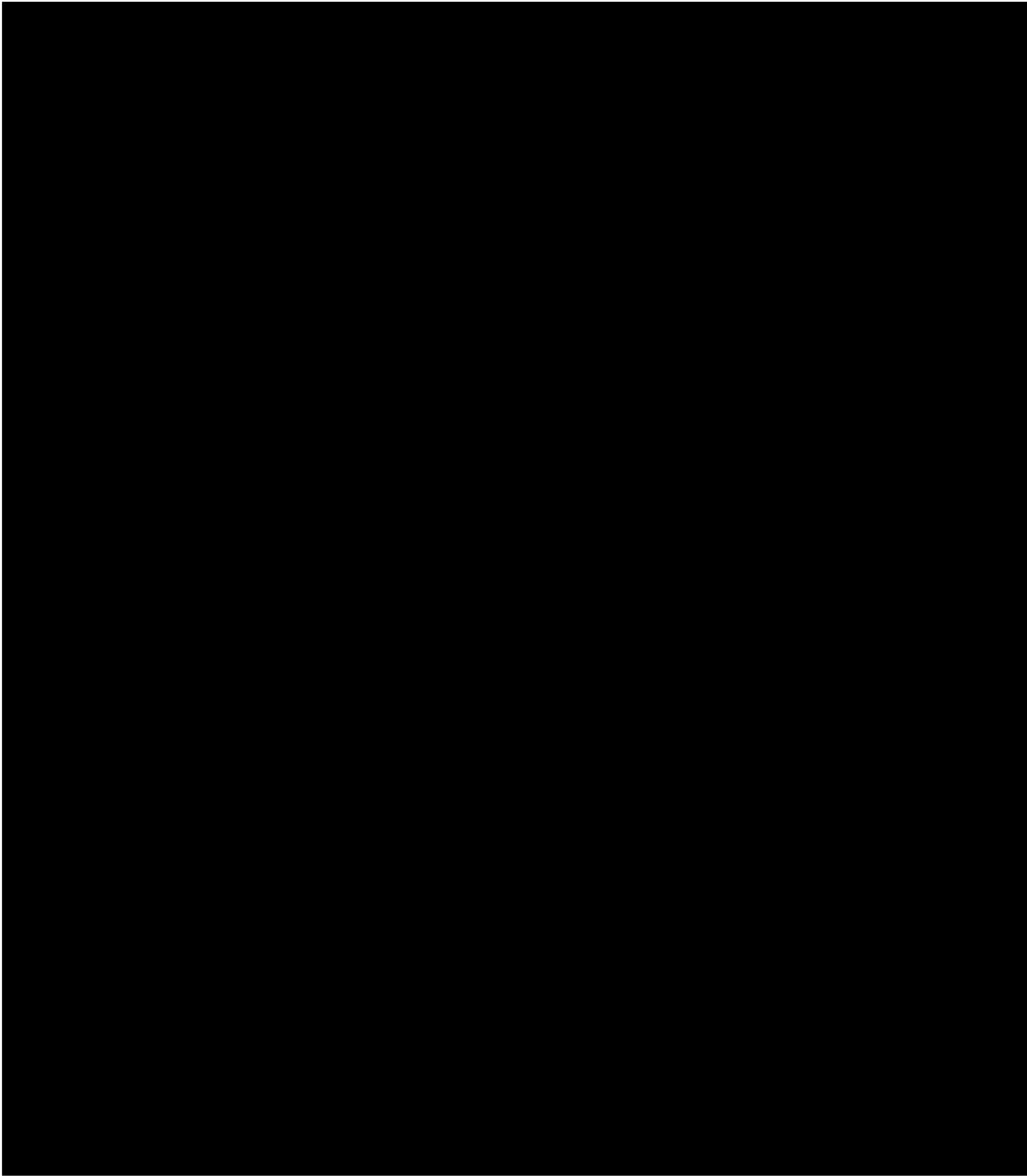


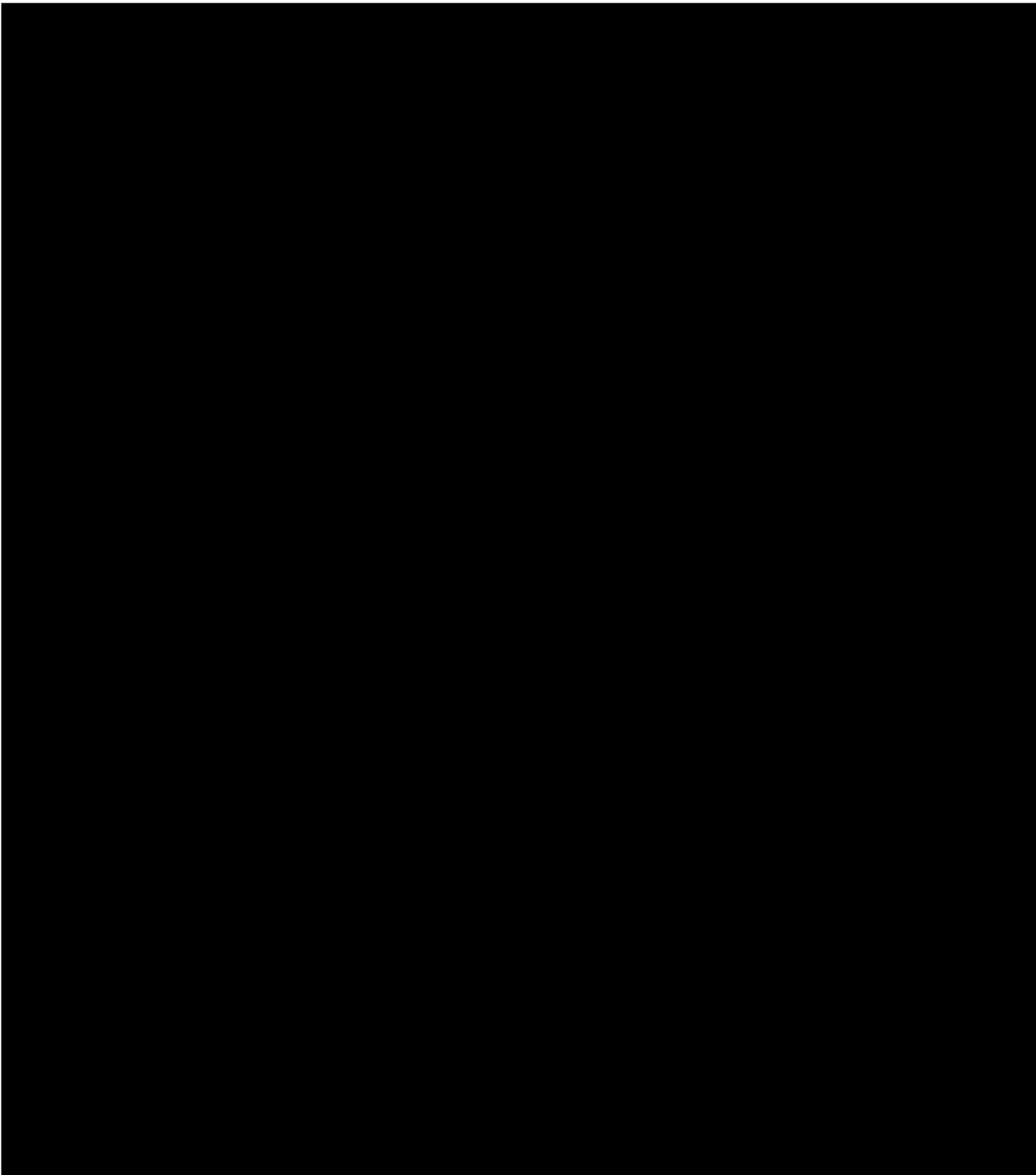


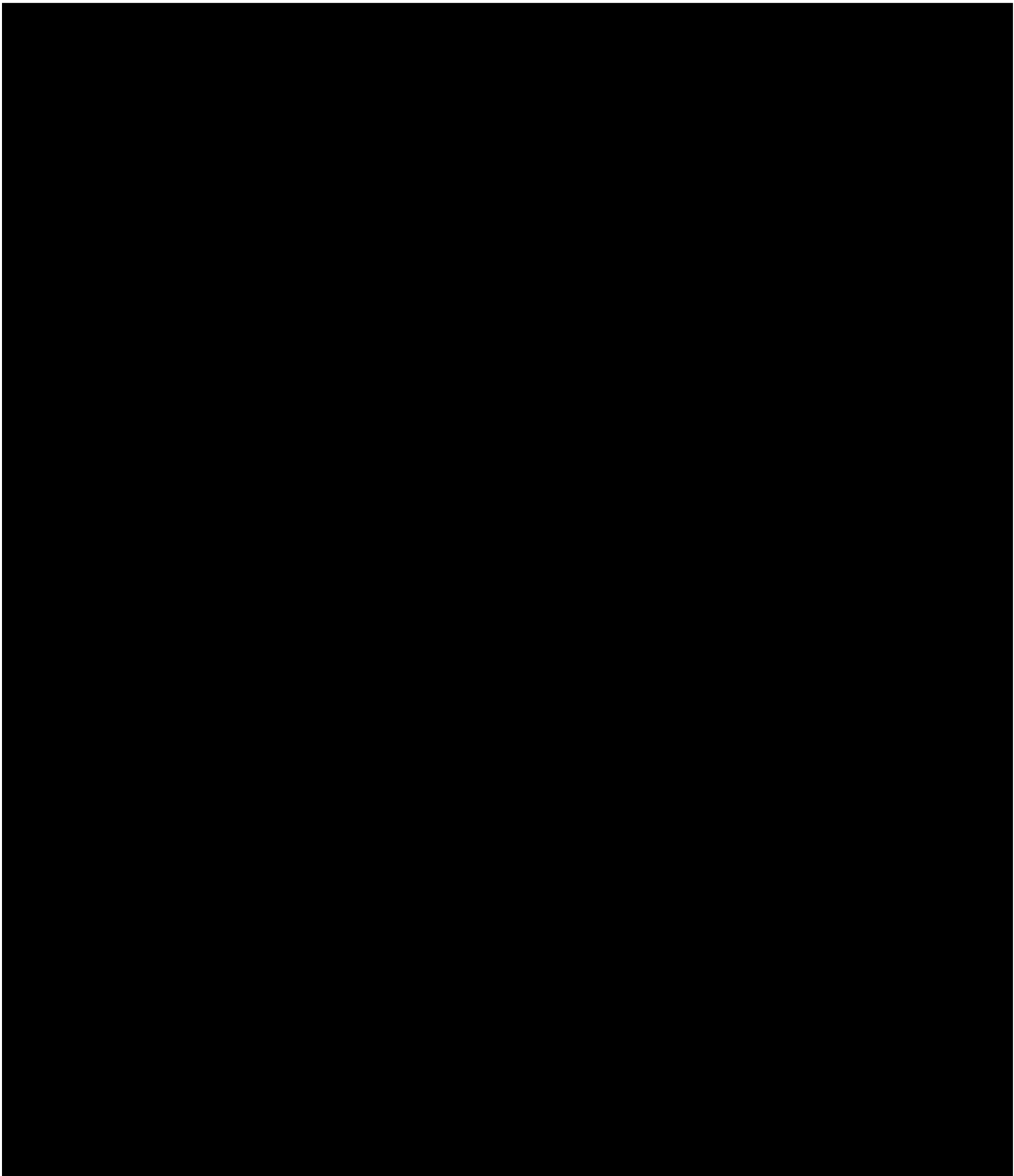


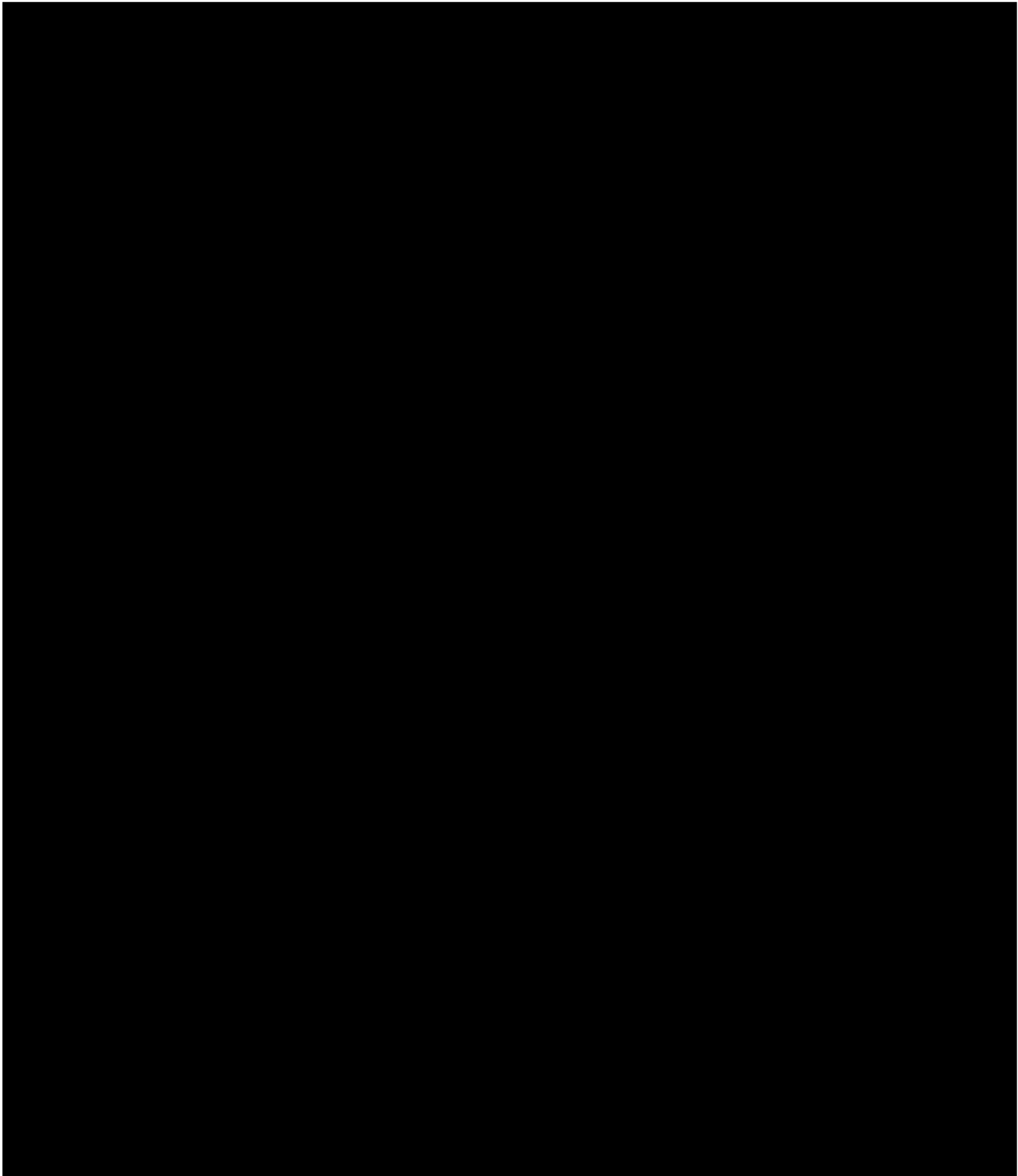


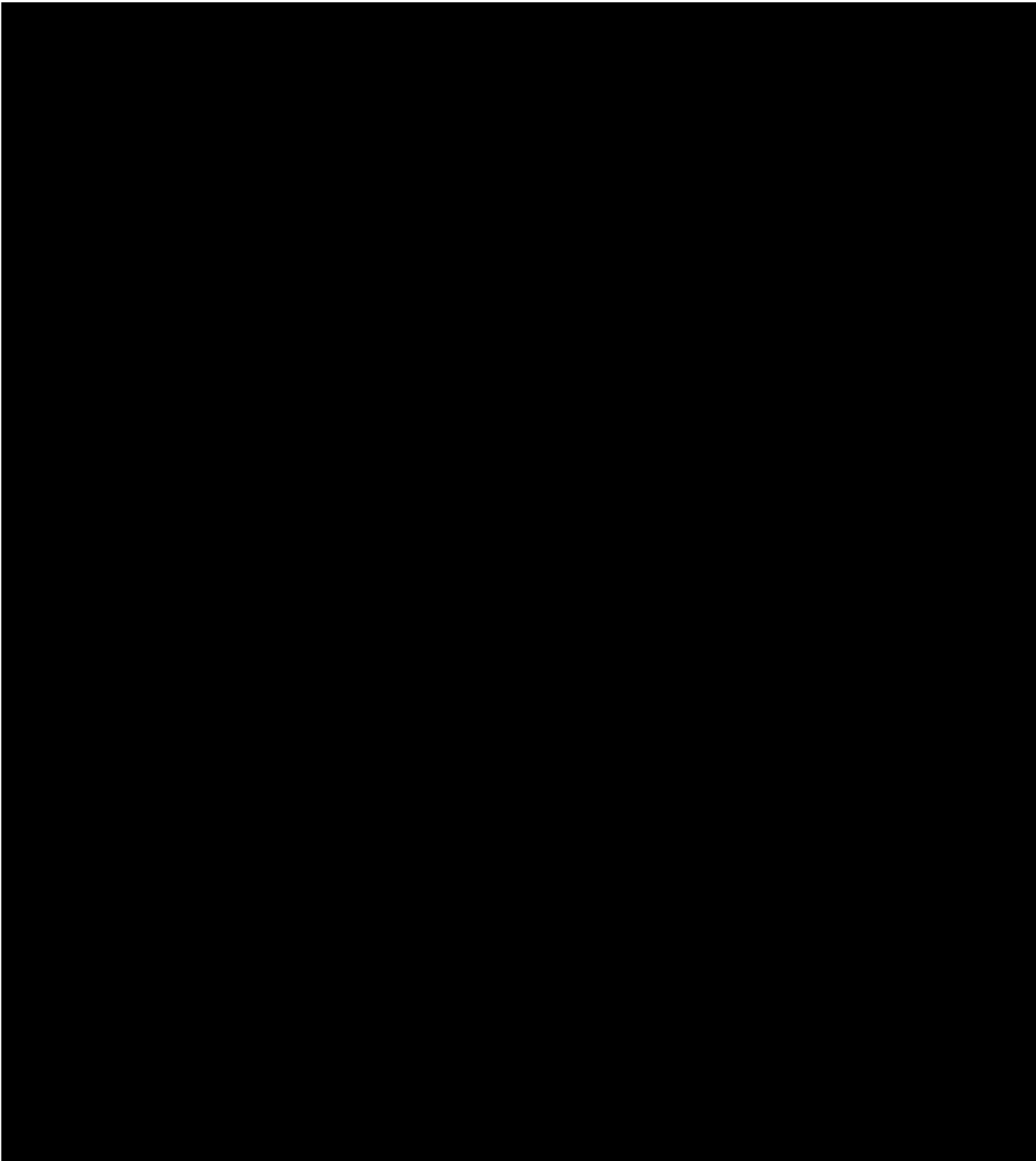


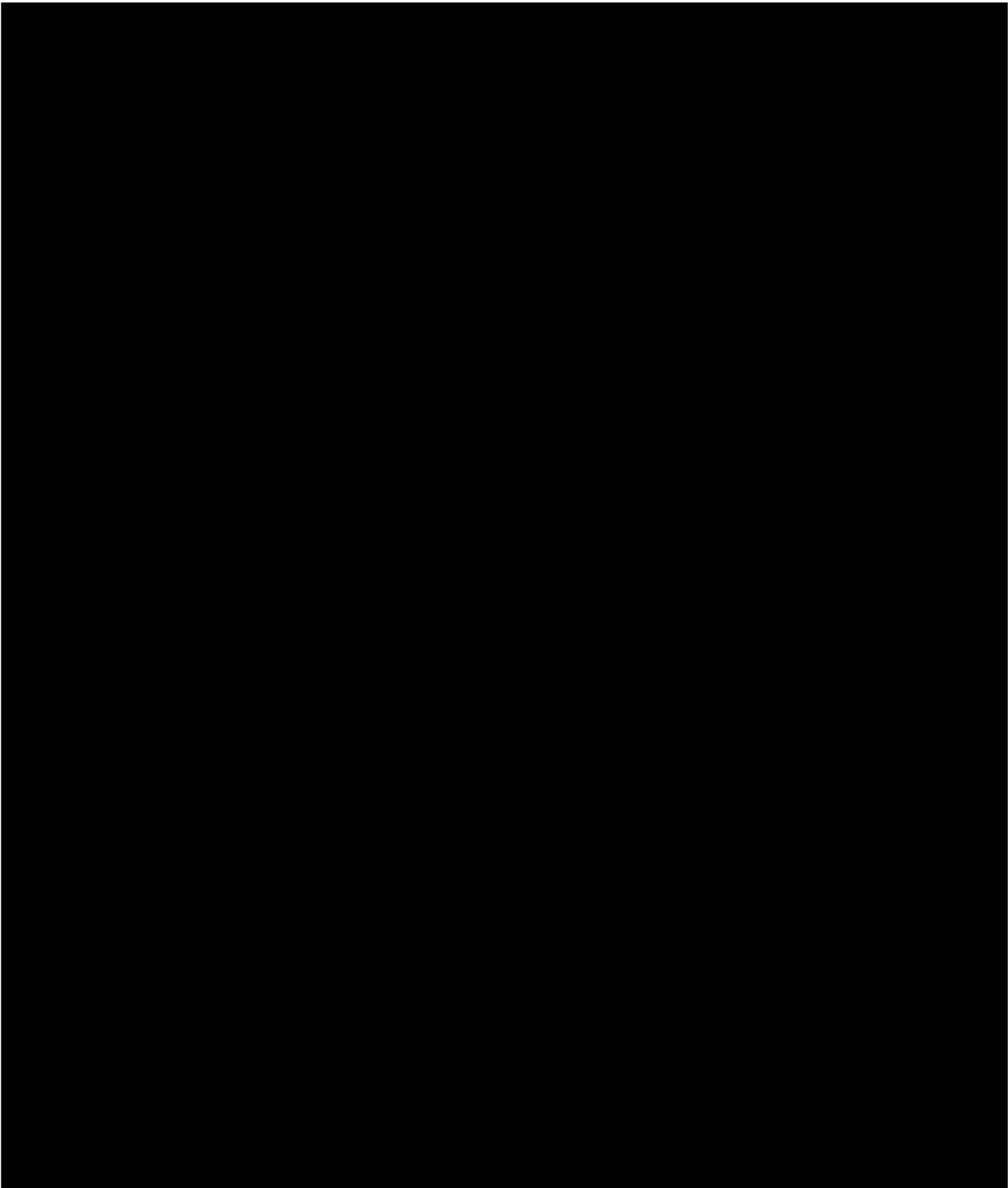


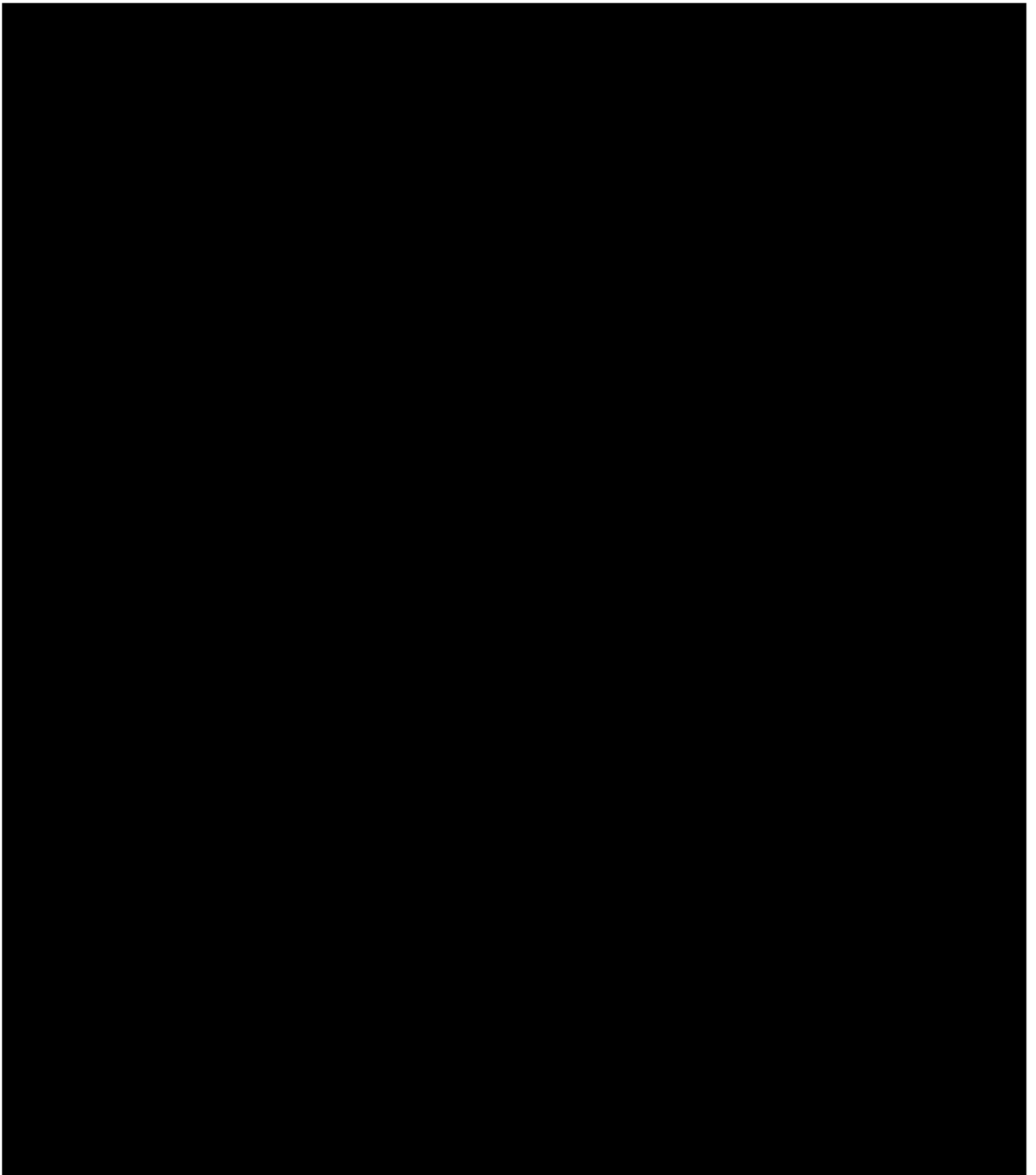


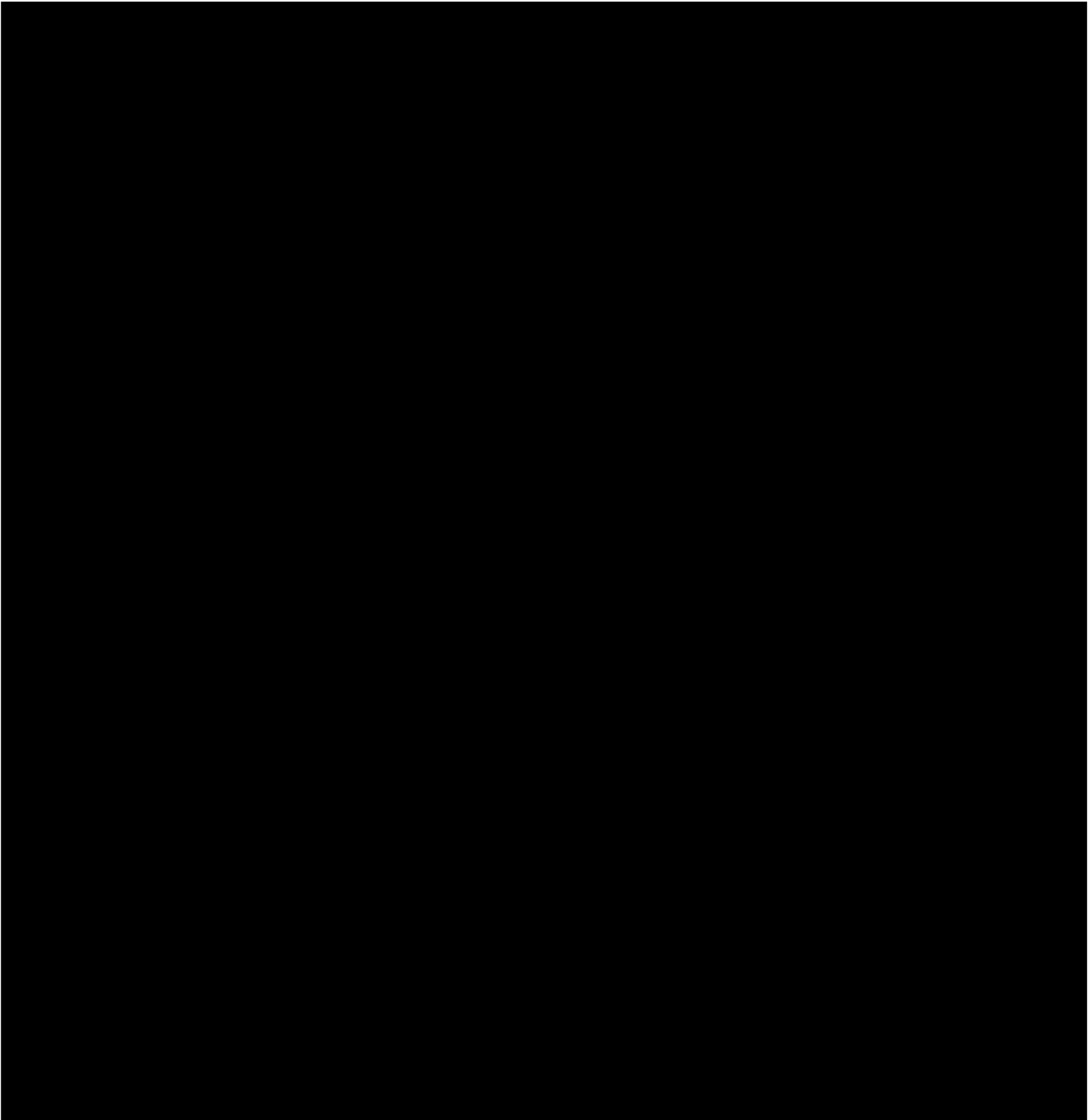


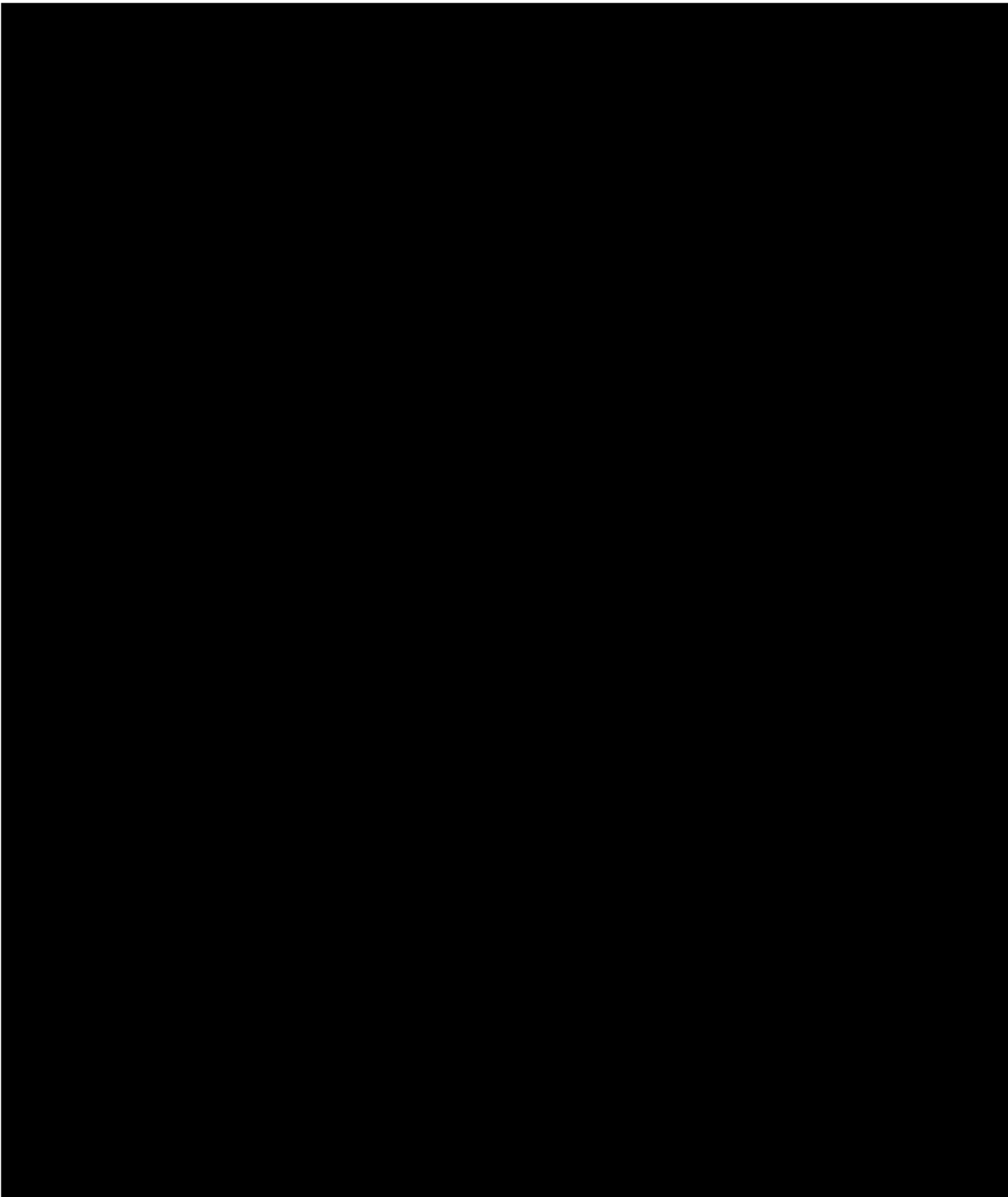


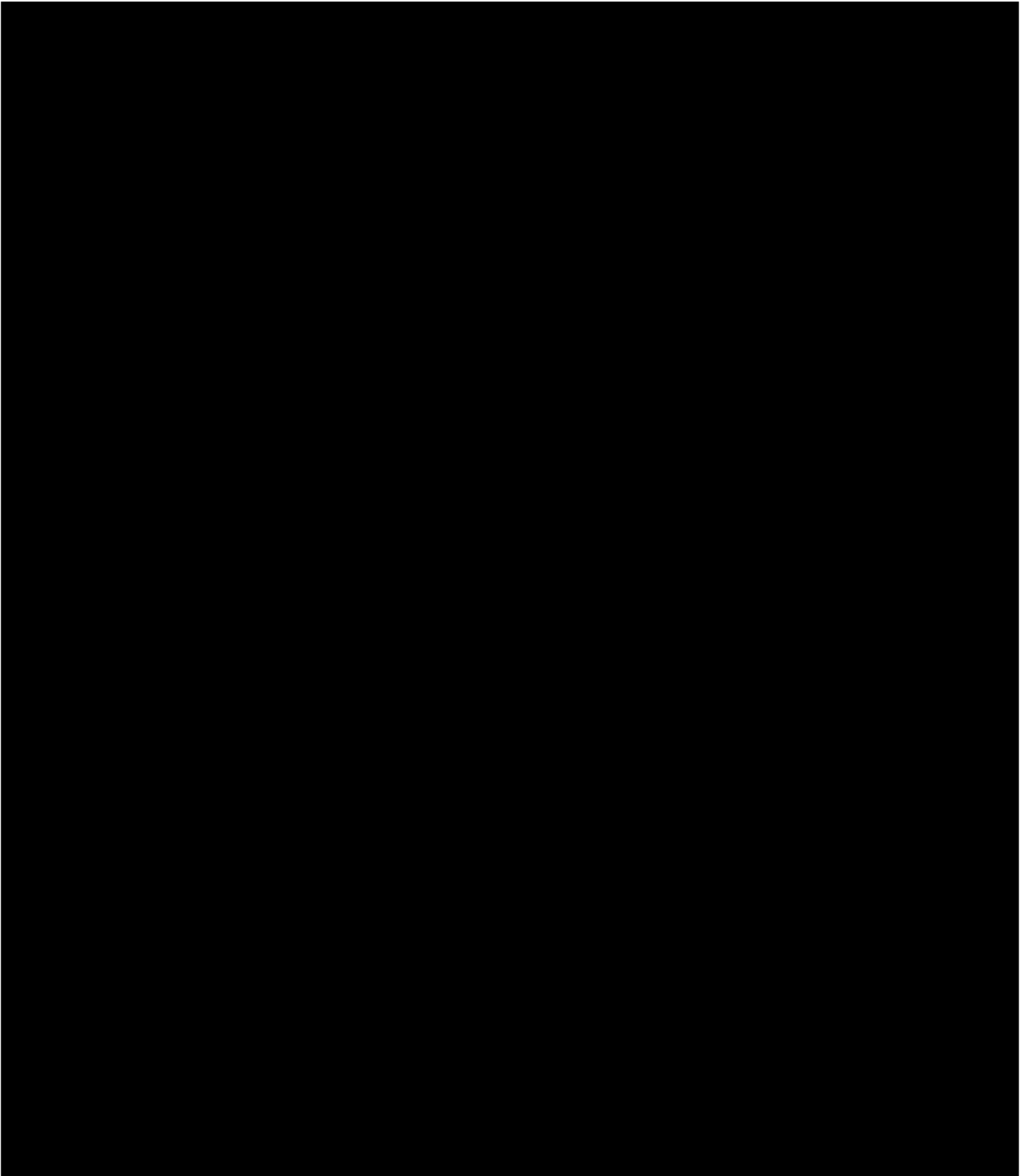


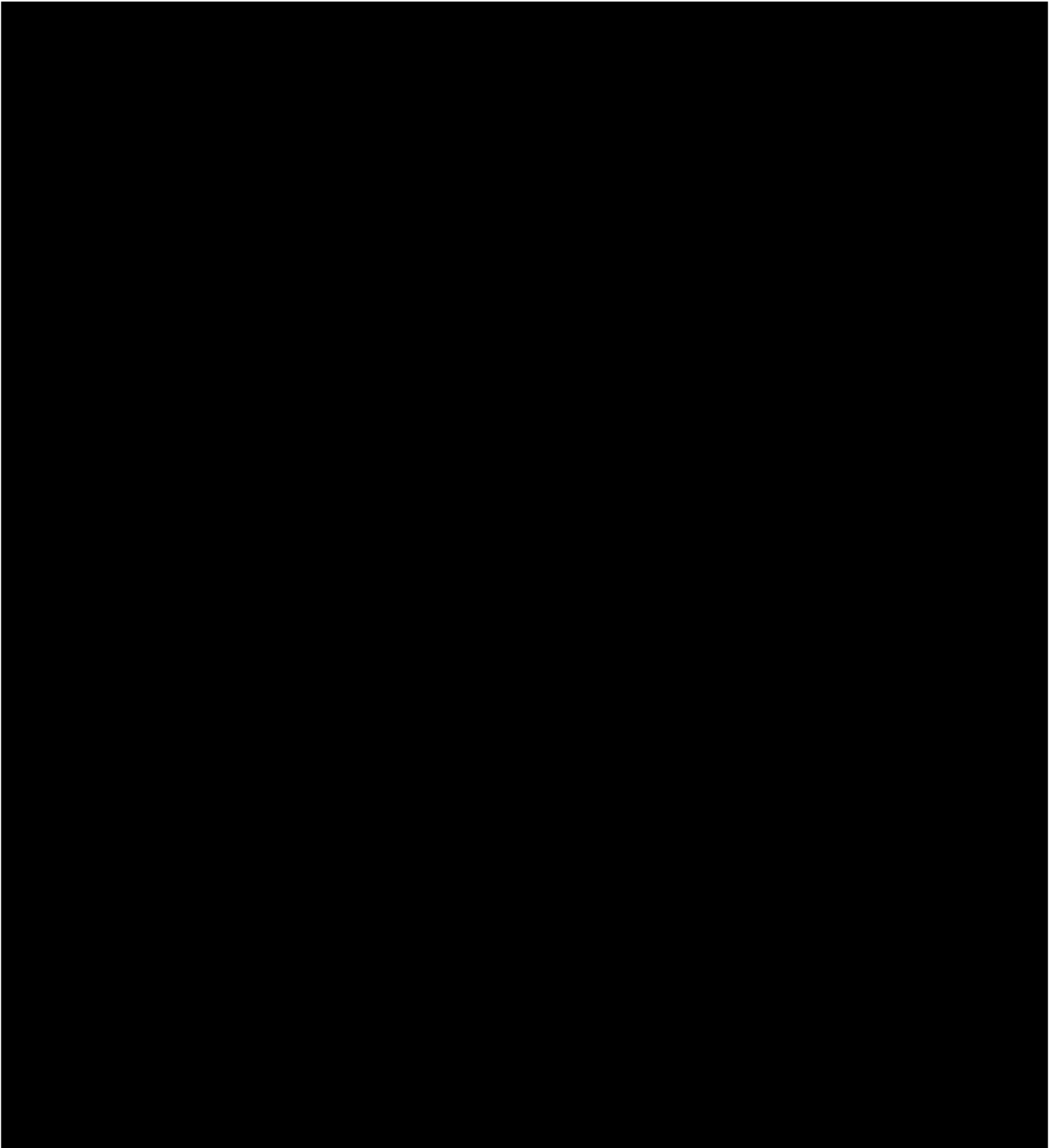


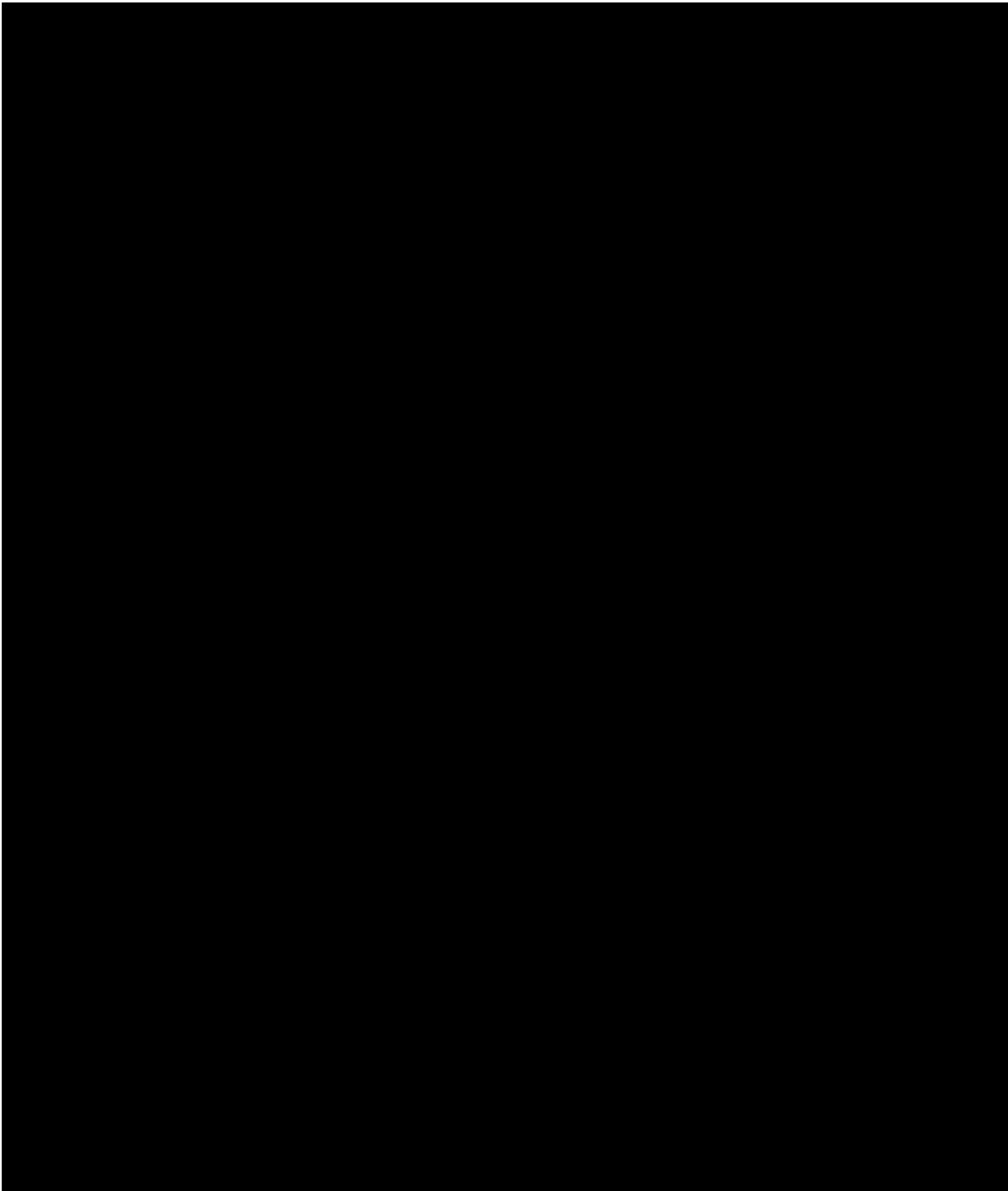


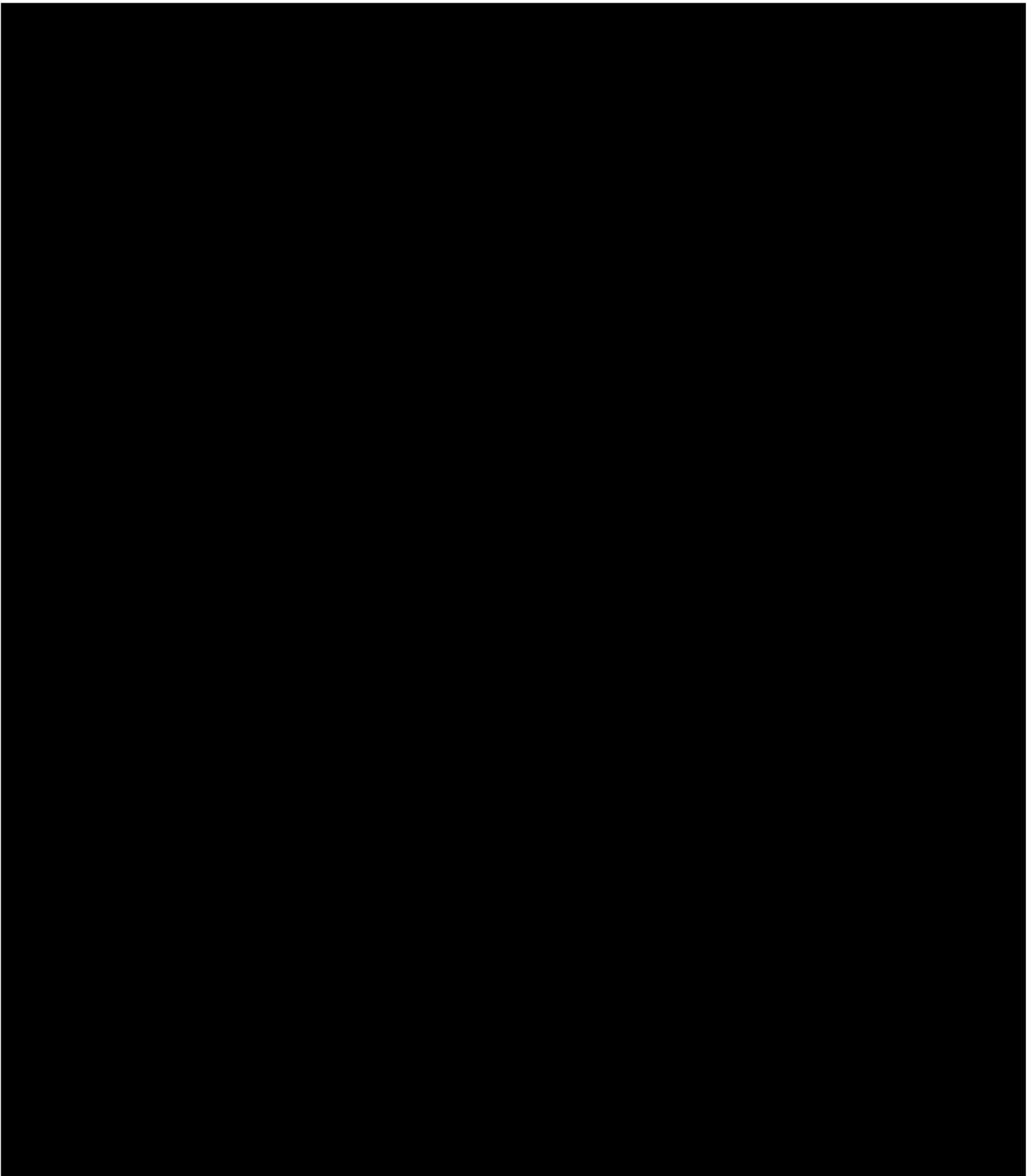


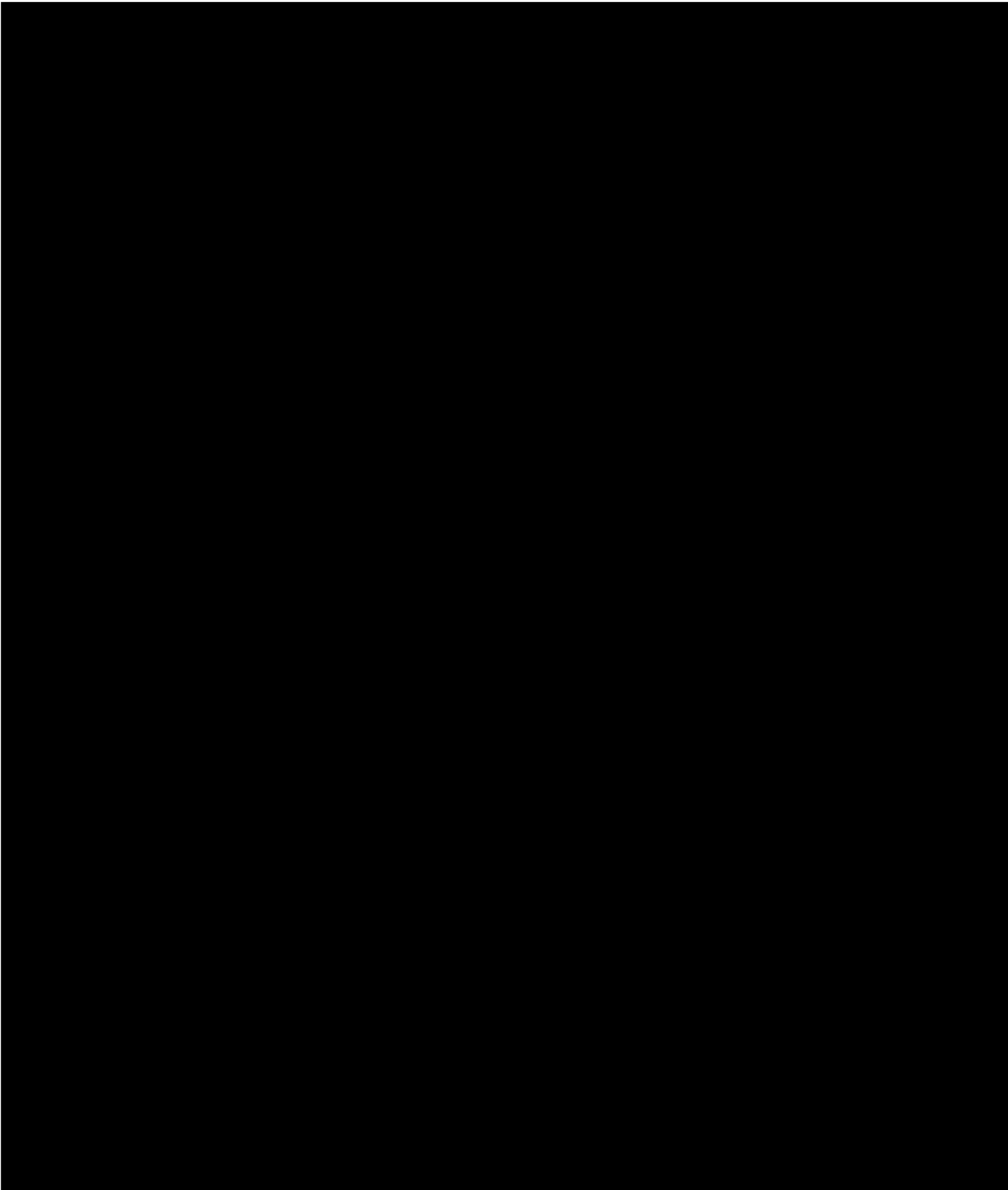


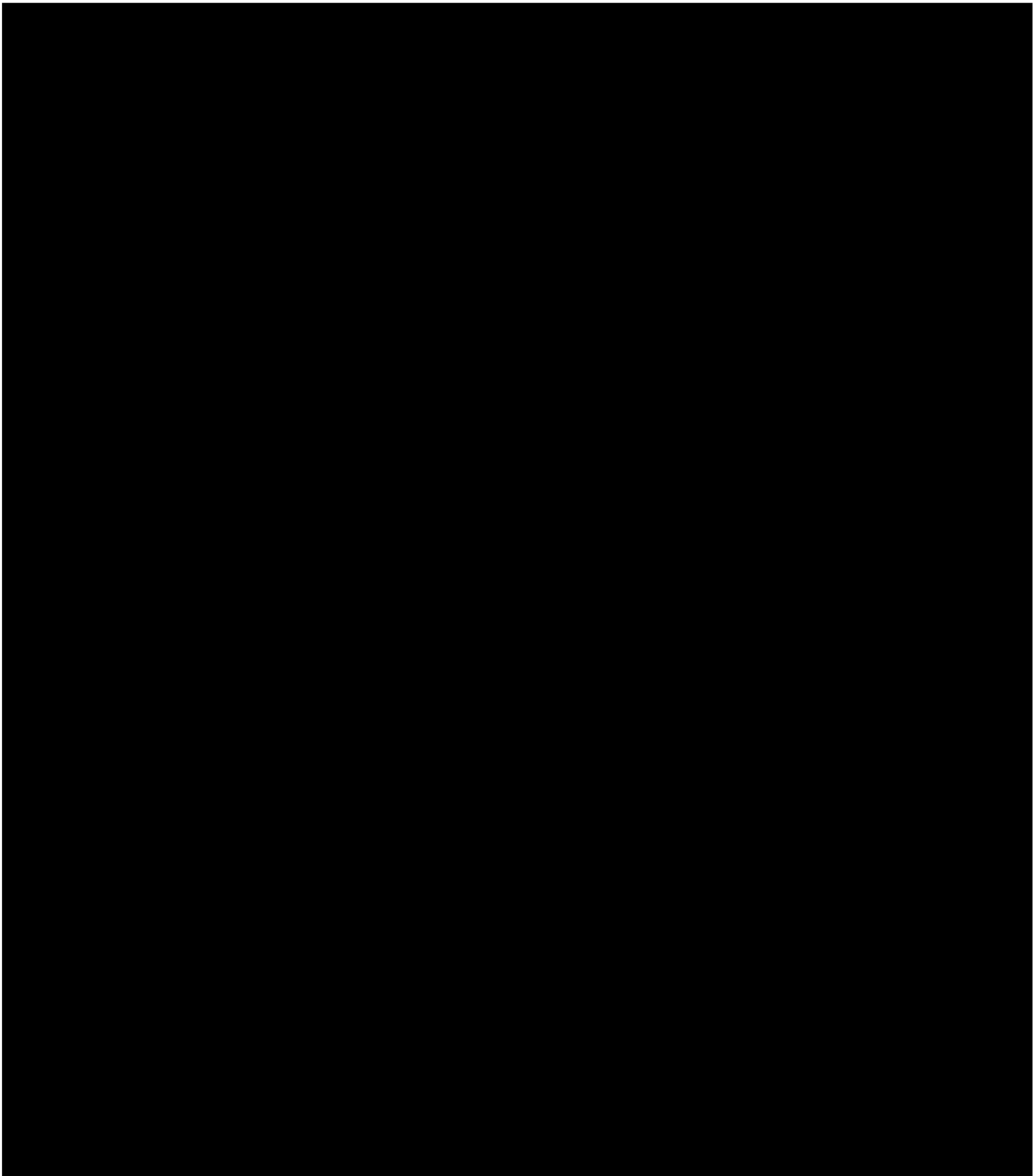


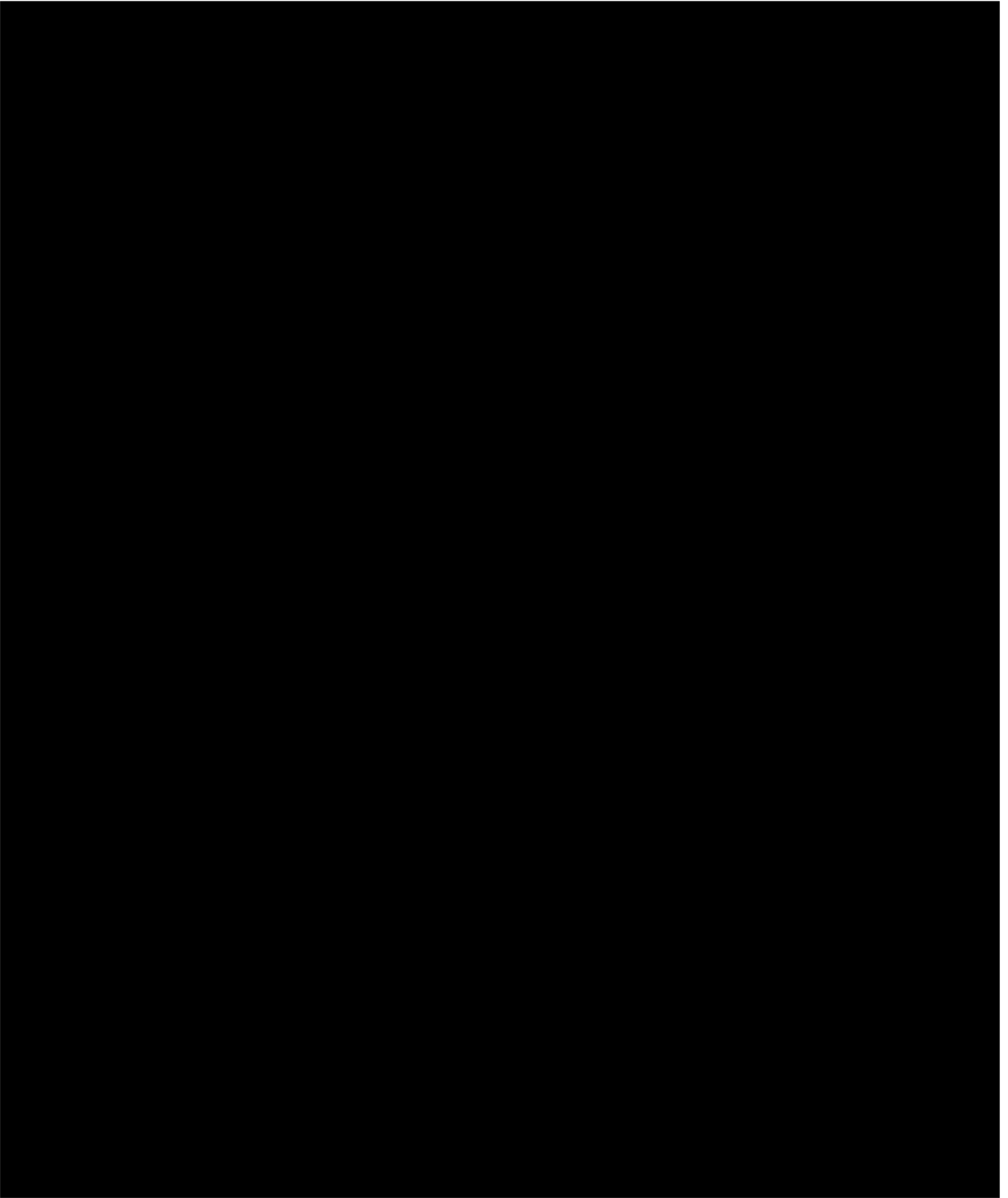


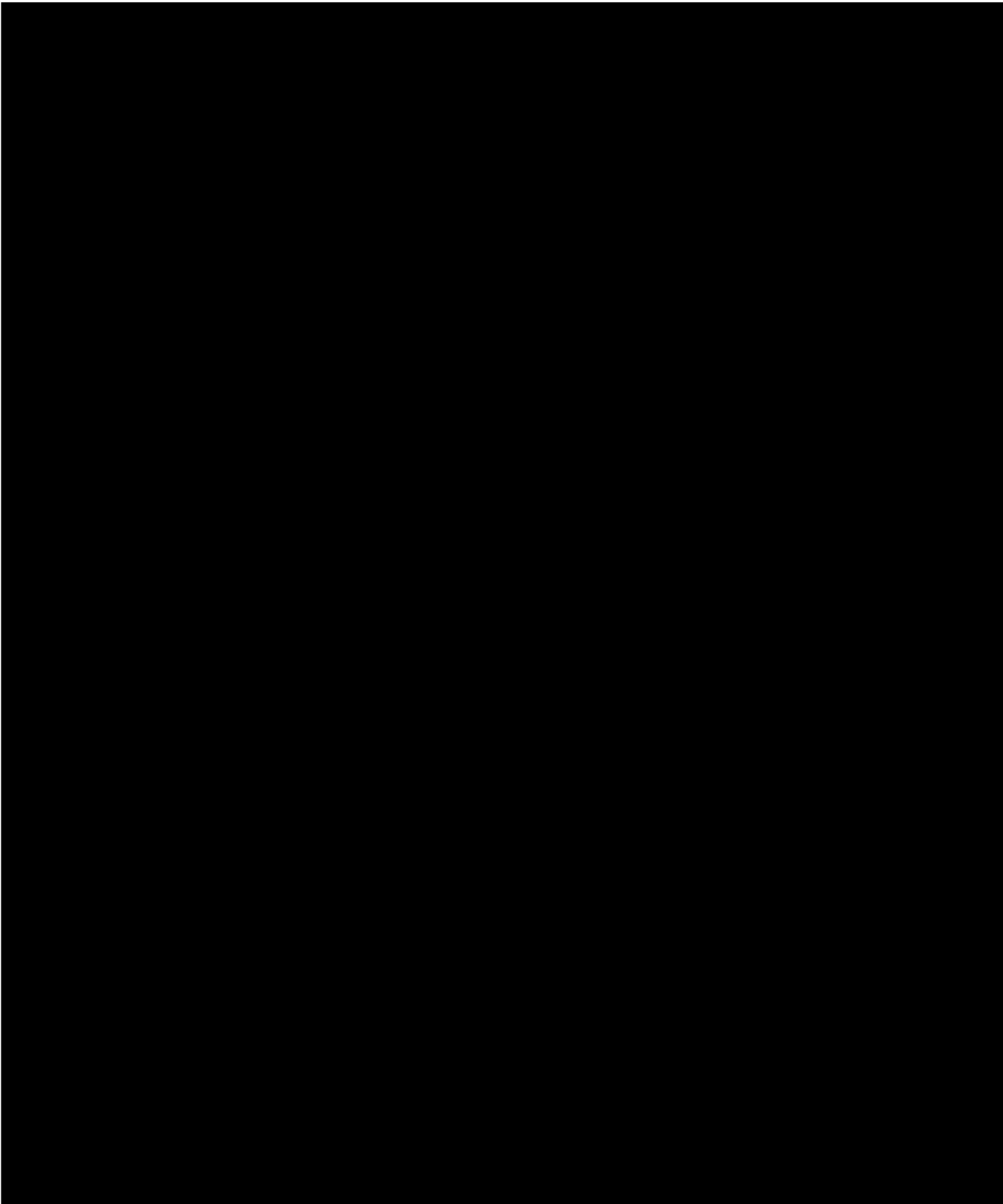


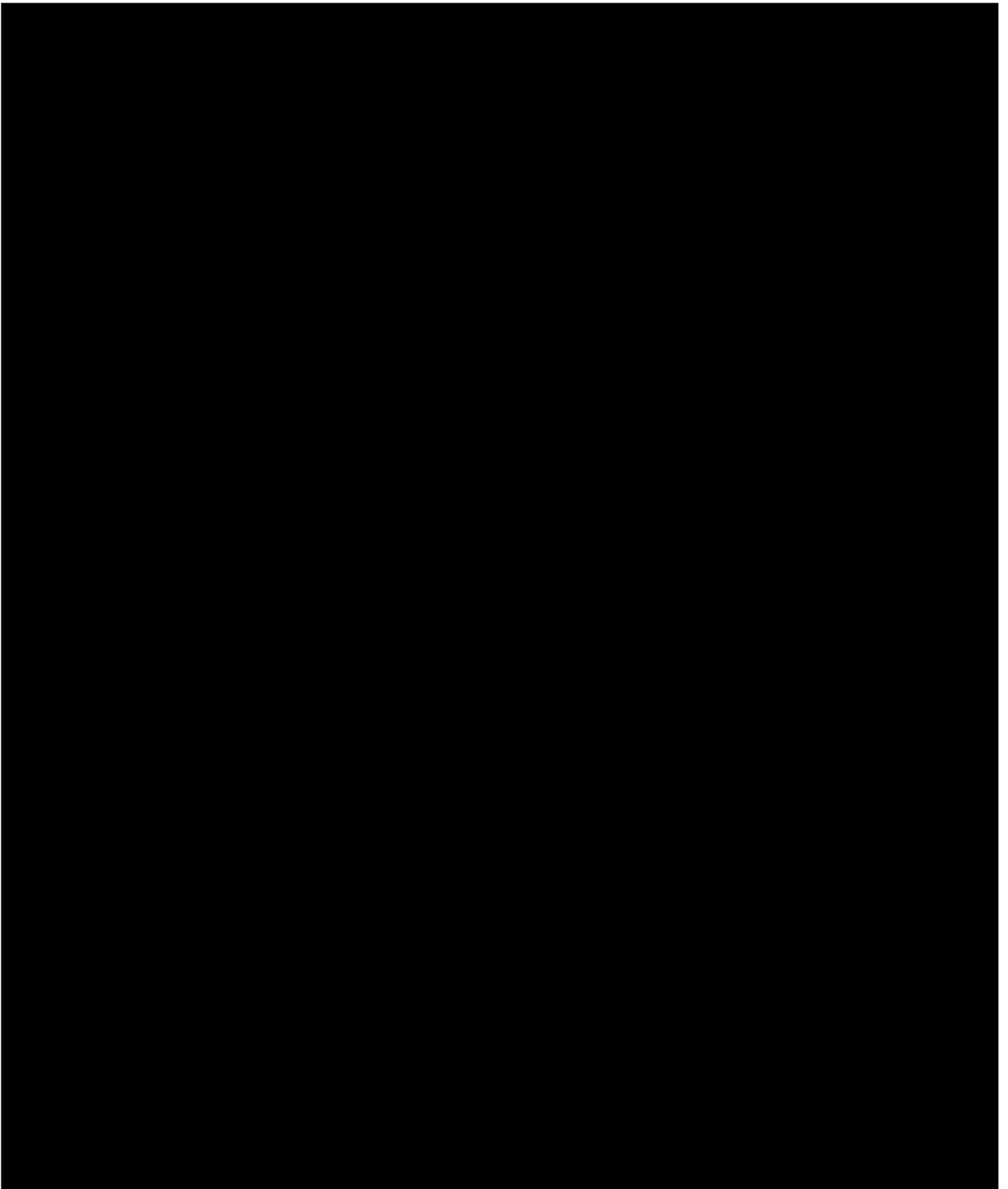


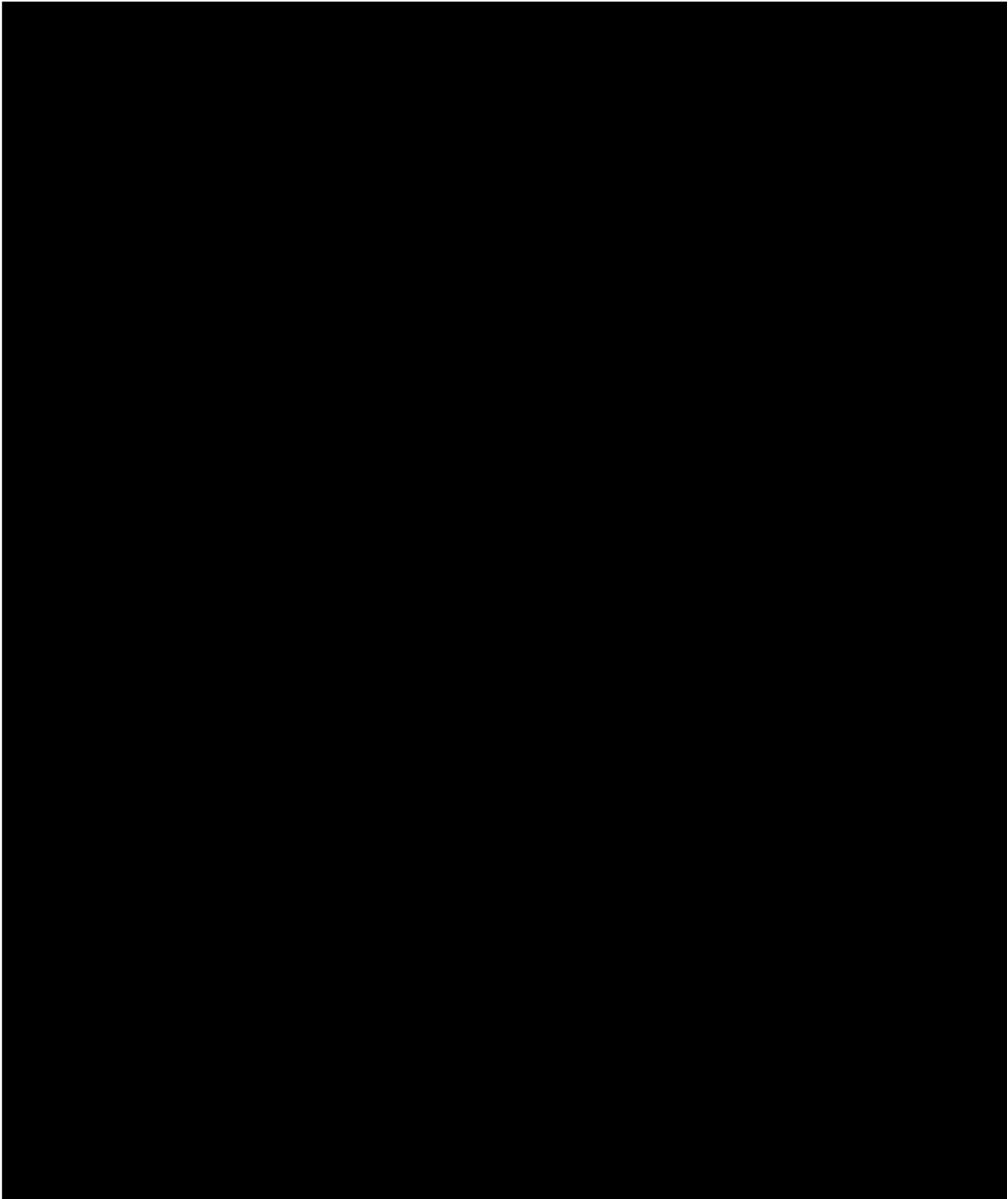


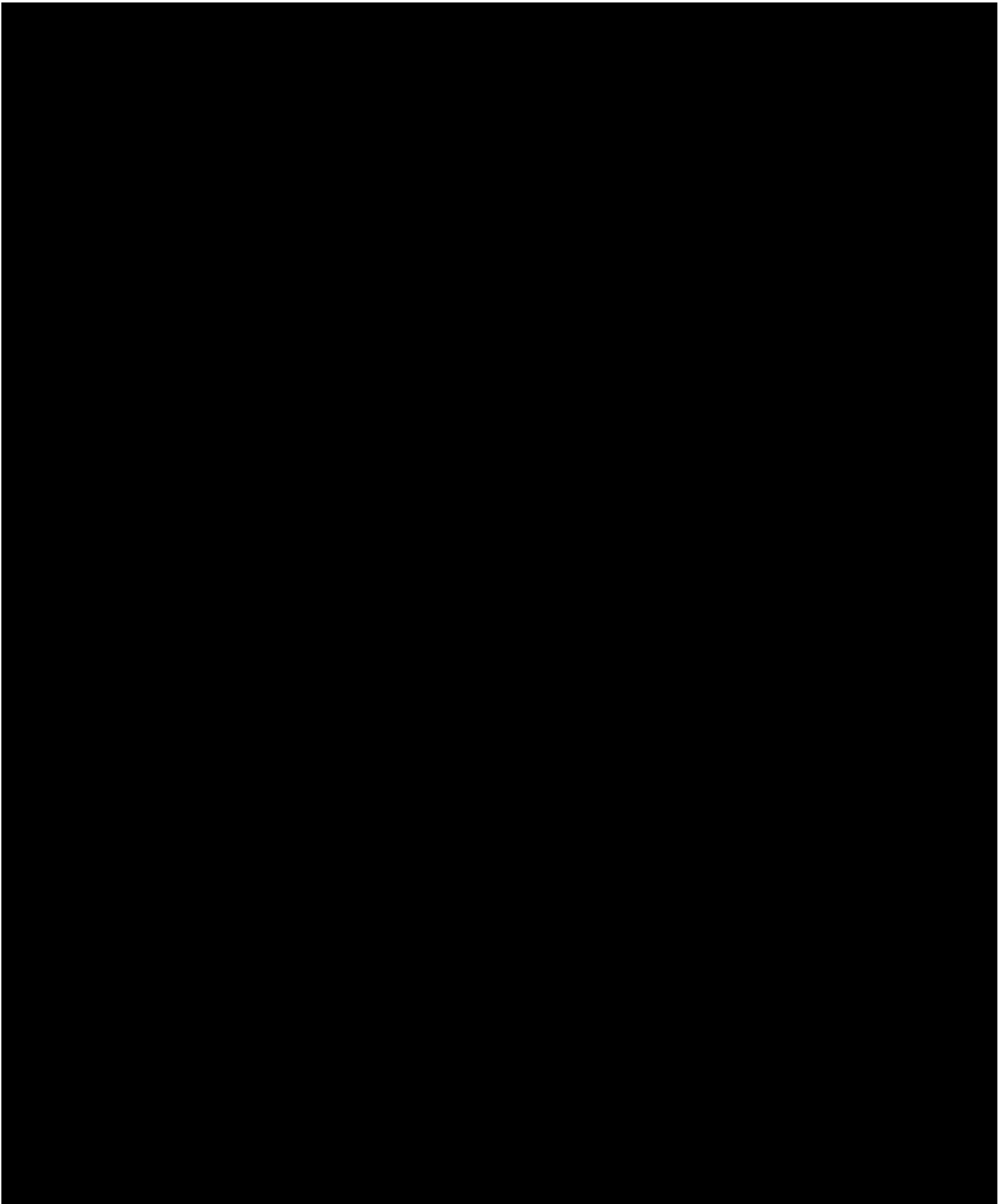


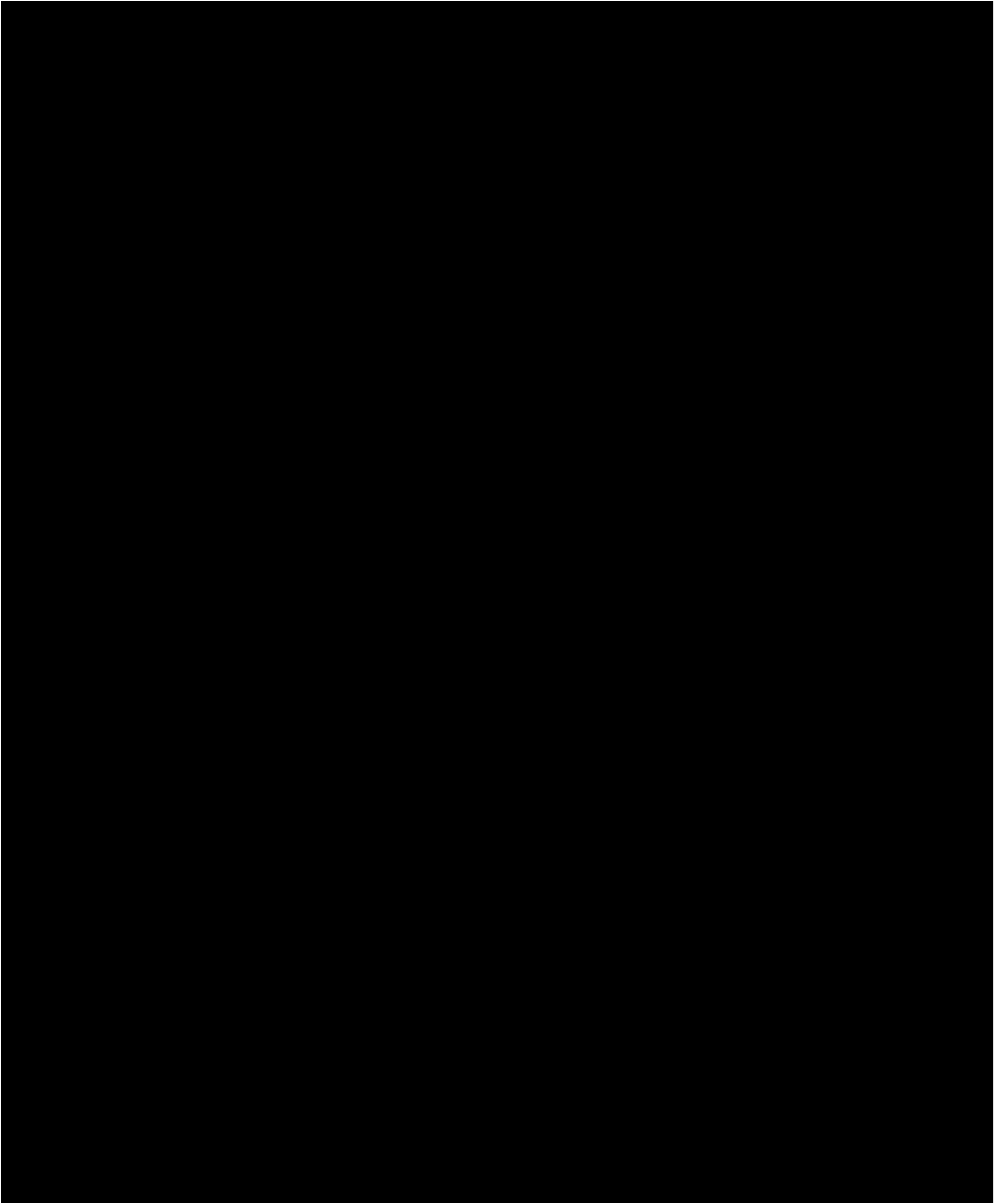


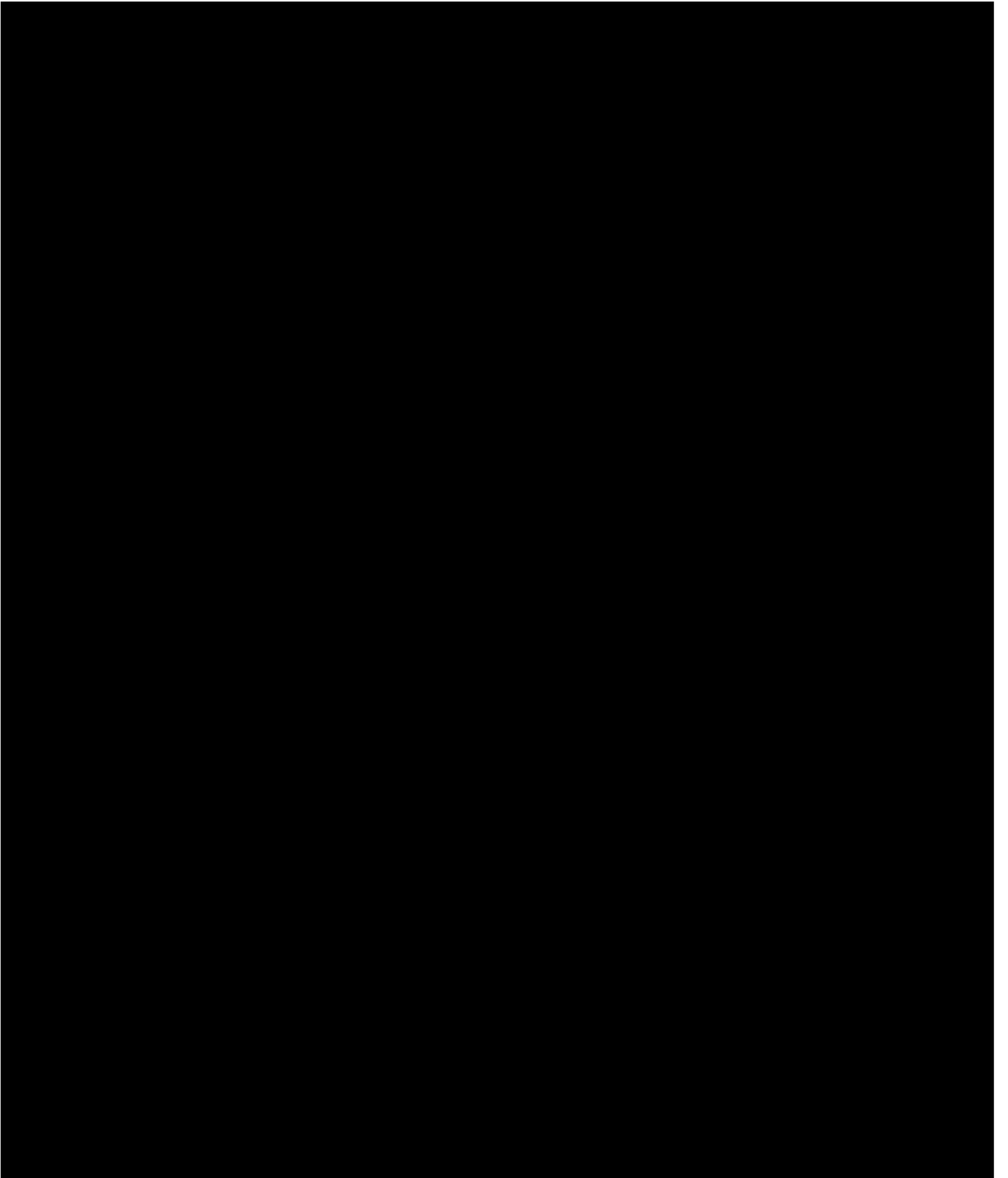


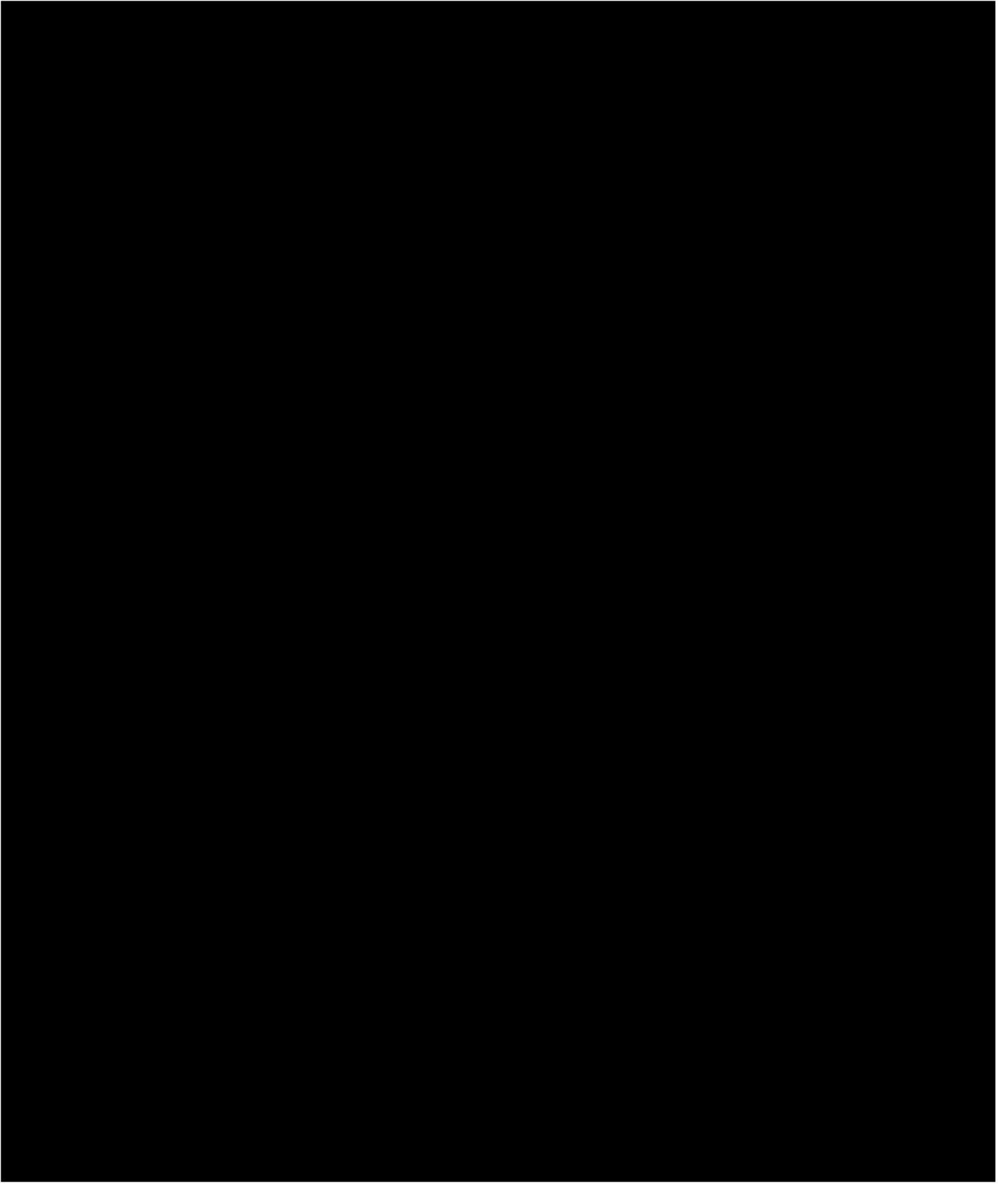


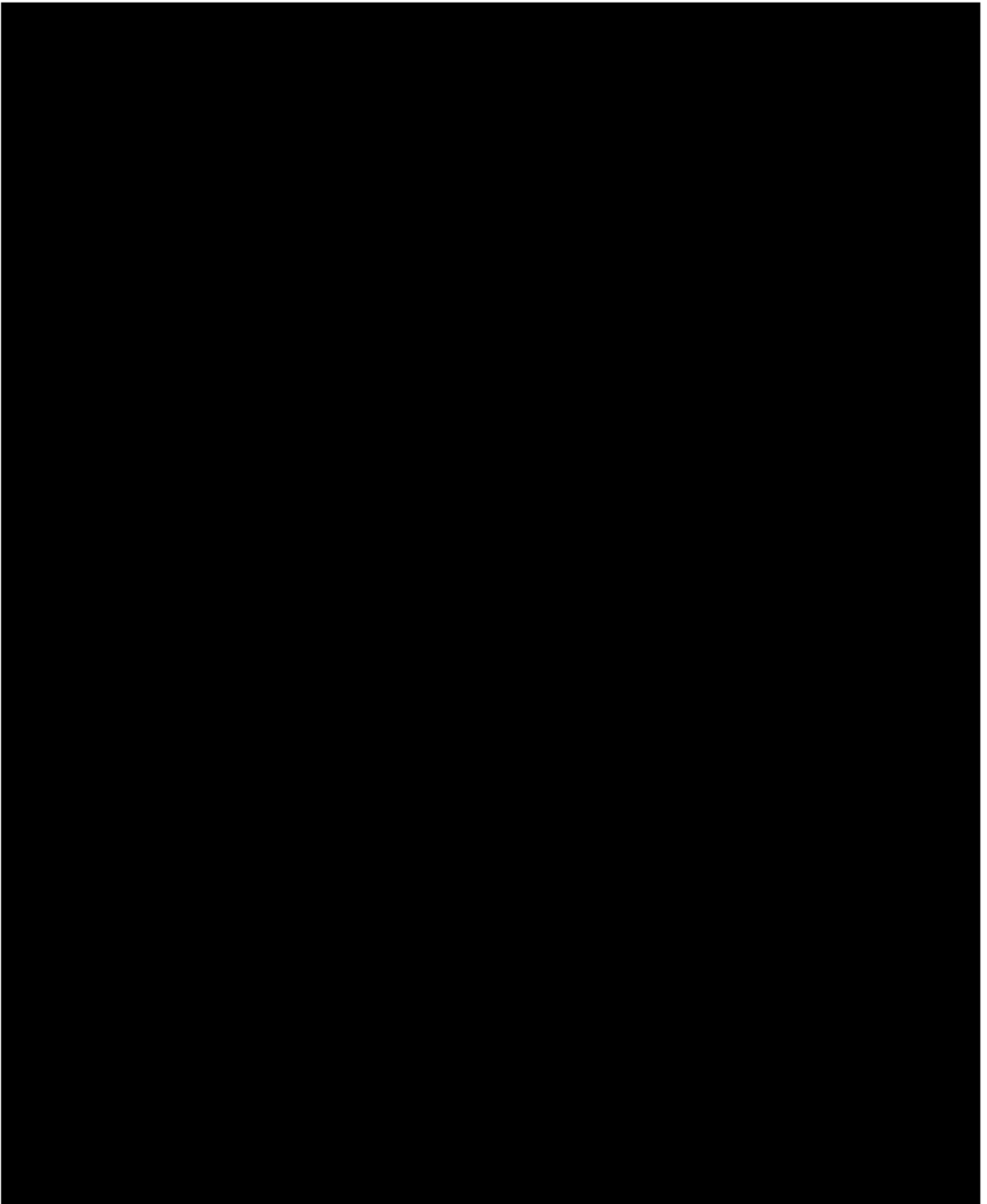














Resumes and Biographies

Project Management Office



Frank Banda

Managing Partner | CohnReznick Advisory LLC |
CohnReznick LLP

BIOGRAPHY

Frank Banda is a Certified Public Accountant (CPA) and Managing Partner of CohnReznick's Government and Public Sector Advisory practice. He has 35+ years of management, audit, accounting and consulting experience with a special emphasis on assisting organizations with accounting, financial management and reporting, program management, and business process management improvement. Frank also has specific expertise in fraud prevention and detection, audit readiness, internal controls, compliance and monitoring, disaster recovery and grant management.

Frank has extensive knowledge of federal audit standards and accounting principles with strong leadership skills and the proven ability to plan and implement large programs while managing risks, resolving issues, and achieving positive change. He has been working with the U.S. Coast Guard Pilotage Division for over 10 years, serving as the Engagement Partner on their rate making agreed-upon procedures engagement. He has assisted governmental entities such as the Texas Division of Emergency Management, Texas Department of Housing and Community Affairs, Texas Water Development Board, Cancer Prevention and Research Institute of Texas, Louisiana Office of Community Development Disaster Recovery Unit, U.S. Department of Energy, Department of Interior, Bureau of Indian Affairs, and Office of Historical Trust Accounting with their accounting and compliance projects; he has overseen plan design from implementation to execution, the establishment of Project Management Offices, and Concept of Operations.

Frank is also well-versed in public policy and audit/fraud prevention, which has enabled him to serve as an expert witness for the Department of Justice (DOJ). He has implemented quality control (QC) and assurance (QA) programs and developed approaches for application verification, grant approval, applicant notification, issue resolution, payment preparation, payment processing and closeout, and has also led inspector general support projects for the Federal Housing Finance Agency (FHFA) – Office of Inspector General (OIG) and the U.S. Department of State.

Proposed Labor Category

Project Manager (Key Personnel) – All Tasks

Proposed Task Areas

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

Education

- Post Graduate Studies in Accounting and Finance - University of Maryland
- B.S., Accounting - University of Maryland

Certifications

- Certified Public Accountant (CPA)
- Certified Fraud Examiner (CFE)
- Chartered Global Management Accountant (CGMA)
- Certified Project Management Professional (PMP)

Professional Affiliations

- American Institute of CPAs
- Maryland Association of CPAs
- Association of Certified Fraud Examiners
- Project Management Institute
- Association of Government Accountants – Corporate Liaison Partner



Frank has managed several high-profile disaster housing recovery engagements where CohnReznick administered, ensured compliance, and monitored the distribution of federal HUD Community Development Block Grant (CDBG) funds to homeowners affected by Gulf Coast hurricanes.

Prior to joining the firm, Frank co-founded and served as Chief Financial Officer for an e-commerce software development company. An article entitled “Citizen-Centric Reporting on the Use of ARRA Funds” by Frank Banda is featured in a book published by the Association of Government Accountants (AGA) entitled Managing for High Government Performance.

EXPERIENCE

Project Executive (May 2015 – Present)

Office of the Inspector General of the Port Authority of New York and New Jersey

Integrity Monitoring of the \$13B John F. Kennedy International Airport Redevelopment program and \$4B Public-Private Partnership (P3) Redevelopment of LaGuardia Airport.

- Assumes overall responsibility for ensuring the completion of all services;
- Coordinates the efforts of all professionals and ensures services are delivered in an integrated, cost-effective and timely manner.

Project Executive (December 2020 – Present)

New Jersey Department of the Treasury (NJDOT) Integrity Oversight Monitoring (IOM); New Jersey Department of Community Affairs (DCA); New Jersey Department of Education (DOE); New Jersey Department of Health (DOH); New Jersey Office of the Secretary of Higher Education (OSHE); New Jersey Housing and Mortgage Finance Agency (HMFA)

CohnReznick is responsible for Integrity Oversight Monitoring, including Program and Performance Monitoring, Financial Monitoring and Grant Management and Anti-Fraud Monitoring for Coronavirus Relief Funds (CRF) pursuant to Section 5001 of the Coronavirus Aid, Relief, and Economic Security (CARES) Act COVID-19 Recovery Funds and Programs across 12 agencies for over \$9B to date.

- Assumes overall responsibility for ensuring the completion of all services;
- Coordinates the efforts of all professionals and ensures services are delivered in an integrated, cost-effective and timely manner.

Project Executive (January 2024 – Present)

New Jersey Department of the Treasury, Office of the State Comptroller (OSC)

CohnReznick contracted with OSC to provide consulting services in relation to its oversight of the Gateway Development Commission (GDC) and the Gateway Program. CR specifically is tasked to perform a Risk Assessment of the Gateway Program and develop an Oversight Framework for OSC regarding its oversight role for the Gateway Redevelopment Project.

- Assumes overall responsibility for ensuring the completion of all services;
- Coordinates the efforts of all professionals and ensures services are delivered in an integrated, cost-effective and timely manner.

**Project Manager (June 2013 – June 2018)****New Jersey Department of Housing and Community Affairs**

CohnReznick was contracted by the NJ DCA-SRD to provide integrity monitoring oversight of \$3 billion in Community Development Block Grant Disaster Recovery (CDBG-DR) funds. These funds supported housing, economic development, planning, and infrastructure programs in response to Superstorm Sandy. The engagement focused on ensuring compliance with federal and state laws, regulations, and contracts; improving operational and financial management; and detecting and preventing fraud, waste, and abuse.

- Led monitoring of subrecipients, contractors, and 18 disaster recovery programs.
- Assessed compliance with applicable laws, policies, and contractual obligations.
- Evaluated internal controls and financial management systems for efficiency and effectiveness.
- Directed the development of over 60 reports containing more than 200 observations and 150 recommendations for program improvement.

Engagement Partner (July 2020 – Present)**Federal Communications Commission (FCC)**

The FCC's C-band Spectrum Reconfiguration Program allows Licensees to purchase spectrum rights through a formal auction and expand their 5G capabilities. Entities currently operating in that spectrum (incumbents) must relocate and costs incurred during the relocation will be funded by the licensees. The FCC established a Relocation Payment Clearinghouse (RPC) responsible for managing the collection and distribution of nearly \$13B of spectrum reconfiguration and relocation funds. To date, the RPC has billed, collected, and distributed more than \$12B of program funds.

CohnReznick serves as the RPC and developed innovative and cutting-edge technology solutions to drive performance management and optimize the financial budget and funds management functions. CohnReznick is responsible for the design and implementation of a claims reimbursement system, financial management system treasury function, and the development and maintenance of approximately 20 tailored financial and operational business processes, standard operating procedures (SOPs), policies & procedures, narratives, flowcharts, internal control, and enterprise risk management documentation.

- Coordinates with our team to meet the workload needs, while ensuring a seamless integration with the team;
- Provides program oversight and supervises the team to ensure that all deliverables and deadlines are met in an efficient and compliant manner;
- Serves as primary point of contact for contract administration and supervises all technical and administrative work performed under the contract;
- Ensures that all project areas are integrated and coordinated to maximize effectiveness and speed of delivery while ensuring accuracy;
- Reviews all project deliverables for accuracy and quality control.

Engagement Partner (September 2014 – Present)**U.S Coast Guard (USCG) Great Lakes Pilotage Division**

The Great Lakes Pilotage Branch of the United States Coast Guard (USCG) is responsible for oversight of three pilot associations, which provide piloting services in the Great Lakes region. Included in this oversight function is the responsibility to set pilotage rates, which encompass pilot compensation, other piloting costs, and other measures.

CohnReznick's procedures were designed to assist the USCG in determining those rates. We performed a series of



procedures to evaluate certain aspects of the expenses incurred by the pilot associations. This agreed-upon procedures engagement was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants (AICPA). Our procedures and findings were submitted in a Summary of Agreed-Upon Procedures and Results as well as a Summary of Findings and Recommendations.

CohnReznick analyzed expenses incurred by the pilot associations to help determine if they were eligible for ratemaking purposes. We sampled transactions using a 95% confidence level, and evaluated if they met the criteria for ratemaking purposes. In order to evaluate compliance, CohnReznick researched Title 46: Shipping, Part 404-Great Lakes Pilotage Ratemaking, Section 5 Guidelines for recognition of expenses, as well as identified Federal Register final and interim rulings and other agreed-upon measures.

- Oversight of the planning, fieldwork and reporting for the engagement;
- Ensure all work was performed in accordance with the Agreed Upon Procedures and in accordance with standards established by the AICPA;
- Ensure the work was performed in accordance with the firm's quality control standards.

Engagement Partner (April 2020 – Present)

Texas Water Development Board (TWDB) — Agreed-Upon Procedures (AUP)/Process Improvement – Fraud Risk Management

CohnReznick is responsible for performing AUPs of recipients of funding through the TWDB for water and/or wastewater projects. The overall goal of the work order is to minimize the risk of fraud, waste, or abuse. Upon completion of AUPs, CohnReznick is responsible for working with loan recipients to implement process improvements.

- Assumes overall responsibility for ensuring the completion of all services;
- Coordinates the efforts of all professionals and ensures services are delivered in an integrated, cost-effective and timely.

Engagement Lead (December 2020 – Current)

New Jersey Department of the Treasury Integrity Oversight Monitoring (IOM); New Jersey Department of Community Affairs ; New Jersey Department of Education; New Jersey Department of Health ; New Jersey Department of Corrections

CohnReznick is responsible for Integrity Oversight Monitoring, including Program and Performance Monitoring, Financial Monitoring and Grant Management and Anti-Fraud Monitoring for Coronavirus Relief Funds pursuant to Section 5001 of the Coronavirus Aid, Relief, and Economic Security (CARES) Act COVID-19 Recovery Funds and Programs.

- Overall engagement management, including planning, execution and reporting;
- Final approval on all deliverables and firm decisions on contractual matters;
- Leadership and oversight of the entire engagement.

Engagement Partner (2013 – Present)

Texas Division of Emergency Management (TDEM)

CohnReznick has served TDEM for the past 10+ years and is proudly their longest-standing vendor providing grant compliance monitoring services. Led by CohnReznick professionals with expertise in federal grant management, with a focus on disaster recovery, CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance to subrecipients and TDEM, processing subrecipient reimbursement requests, closing



projects and disasters, providing re-occurring and ad-hoc reporting, advising on workflow process improvement, and financial management.

As the grant compliance monitoring affiliate, we provide the following services:

- Perform complex grant coordination, financial and programmatic compliance, technical assistance, and program management to respond to, administer, organize, and monitor federally funded disaster recovery grants within Texas;
- Conduct continuous monitoring activities, verify projects are completed within the approved scope of work, and identify and resolve compliance issues;
- Evaluate opportunities to provide technical assistance and assist local jurisdictions and state agencies in maximizing reimbursement potential; and close projects and disasters.
- We have reviewed and processed reimbursement requests for over \$1B; provided guidance and assistance to over 2,200 grant subrecipients; and closed more than 11,000 projects across 20+ disasters over the last 3 years.
- Overall engagement management, including planning, execution, and reporting;
- Final approval on all deliverables and firm decisions on contractual matters;
- Leadership and oversight of the entire engagement.

Engagement Partner (April 2017 – Present)

State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU) QA/QC

CohnReznick provides QA/QC services for the Restore Louisiana (Restore) Homeowner Assistance Program for the OCD/DRU. The Restore Program is funded by allocations from HUD's Community Development Block Grant Disaster Recovery (CDBG-DR) Program with the objective of assisting the state in long-term recovery efforts. Scope includes Program Monitoring; Information Technology Software Systems Reporting and Monitoring; Eligibility and Award Calculation Review; Business Process Design and Enhancement; and Construction Monitoring.

- Oversight of the project and engagement team.



Abigail “Abby” Rollins

Partner | CohnReznick Advisory LLC

BIOGRAPHY

Abigail “Abby” Rollins is a Partner in CohnReznick’s Government and Public Sector Advisory practice with 18+ years of experience in emergency management services. Based in Austin, she is a firm leader in providing policy and operational support services to government agencies including compliance and monitoring, QC/QA, and policy and procedure development and documentation. Abby’s work in this area includes contractor assessment reviews for the Government National Mortgage Association, QC reviews for HUD’s Multifamily Accelerated Processing program, and financial and project management system assessment for the Louisiana Coastal Protection and Restoration Authority.

Abby has overseen a variety of engagements providing project management, financial management, policy and program compliance, and oversight consulting services to state and federal government clients. She recently served as the project manager contracted by the Texas Division of Emergency Management (TDEM), responsible for managing and administering a portfolio of \$7B+ in federal funds for federally declared disasters in the State of Texas.

Abby has also contributed to the New York Governor’s Office of Storm Recovery’s (NYGOSR) CDBG-DR PA Match Program, disbursing \$150M to local governments and municipalities in recovery efforts related to Hurricane Sandy.

EXPERIENCE

Engagement Partner (April 2021 – Present)

North Carolina Emergency Management (NCEM)

CohnReznick serves as Grant Monitor for NCEM and has used our strategic planning approach to incorporate operational and workforce improvements in their stewardship of federal funding across 10 active disasters spanning more than \$3B in program costs. CohnReznick is responsible for establishing processes and procedures, systems to make grant administration efficient, effective, and compliant with federal requirements, providing proactive technical assistance to subrecipients, processing subrecipient reimbursement requests, closing projects and

Proposed Labor Category

Project Manager (Key Personnel) – All Tasks

Proposed Task Areas

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

Education

- B.B.A, Business Administration and Economics, Millsaps College

Certifications

- Certified Fraud Examiner (CFE)
- Certified Project Management Professional (PMP)
- Certified Grants Management Specialist (CGMS)



disasters, providing re-occurring and ad-hoc reporting, and advising on workflow process improvement.

Project Manager (February 2016 – April 2017; October 2017 – Present)

State of Texas, Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to TDEM for FEMA grant administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, centralized data and reporting, effective quality management protocols, and reviewing and improving procedures addressing reimbursements and financial management. Abby performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize and monitor federally funded disaster grants within the State of Texas.

Engagement Partner (Sept 2024 – May 2025)

Hawaii Emergency Management Agency (HI-EMA)

CohnReznick performs complex grant reconciliation and financial and programmatic compliance for HI-EMA's \$500 Million Non-Congregate Sheltering (NCS) projects from the Maui fire. Our team is responsible for 1) stakeholder data alignment, 2) contract compliance, 3) financial reconciliation, 4) process mapping, and 5) sheltering contractor report recommendations.

- Providing direct technical assistance and eligibility support to HI-EMA;
- Create project closeout workbook template to be used to validate costs;
- Expediting the collection, inventory, classification and organization of relevant financial documents to support the NCS projects;
- Reviewing existing procurements and contracts to ensure regulatory compliance and vendor satisfaction of terms;
- Aligning/grouping all expenses and contracts to specific eligible Category B activities;
- Identifying expenses and activities that may need further documentation or justification to validate eligibility;
- Coordinating with appropriate stakeholders to obtain necessary eligibility documentation or justification;
- Assisting with and responding to Request(s) for Information (RFI) issued by FEMA;
- Ensure compliance with federal, state and local regulations.

Engagement Partner (April 2020 – Present)

Commonwealth of Massachusetts, Massachusetts Emergency Management Agency (MEMA)

CohnReznick performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the Commonwealth of Massachusetts for COVID-19. Our team is responsible for applicant outreach, training, technical assistance and performing project reviews. During this engagement we also developed a grant management system solution utilizing the Commonwealth's SharePoint platform.

Engagement Partner (April 2021 – Present)

North Carolina Emergency Management (NCEM)

CohnReznick serves as Grant Monitor for NCEM and has used our strategic planning approach to incorporate operational and workforce improvements in their stewardship of federal funding across 10 active disasters spanning more than \$3B in program costs. CohnReznick is responsible for establishing processes and procedures, systems to make grant administration efficient, effective, and compliant with federal requirements, providing proactive technical assistance to



subrecipients, processing subrecipient reimbursement requests, closing projects and disasters, providing re-occurring and ad-hoc reporting, and advising on workflow process improvement.

Project Manager (March 2013 – January 2016)

New York Governor's Office of Storm Recovery (GOSR)

Assisted GOSR in administering the Infrastructure PA CDBG Match program, which assists local governments and municipalities in recovery efforts using government funds. Reviewed FEMA-eligible project worksheets to determine if project costs are eligible to be reimbursed for the non-federal share with HUD-CDBG funding. Review included an evaluation of eligibility funding—per the scope of work—environmental clearance, procurement, financial/cost management, insurance/duplication of benefits, labor compliance, Section 3, and Civil Rights. She assisted in overall project management by developing project plans, identifying, and tracking program tasks, documenting issue resolution, and monitoring and communicating reports on daily production to the client.



Jane Brogan

Director | CohnReznick Advisory LLC

BIOGRAPHY

Senior executive with over 20 years' experience, including 15 as a leader in state and local government, delivering disaster recovery, housing, and community development programs. Skilled in designing and executing highly complex and technical programs. Vast experience in developing data-driven policy, program management, regulatory interpretation, compliance, and reporting.

Uniquely understands CDBG-DR requirements and programs from 15 years as a direct grantee. As a practitioner, knows the grantee perspective, has a firsthand understanding of the challenges, and has created programs that meet the needs of communities. Designed and oversaw programs utilizing \$11.8 billion of CDBG-DR funds that helped over 23,000 households, 11,000 businesses, and hundreds of resilient infrastructure projects.

EXPERIENCE

Chief Policy and Research Officer / Managing Director of Policy (February 2015 – January 2022)

New York Governor's Office of Storm Recovery | NY Rising Homeowner Recovery Program

While on staff at the New York Governor's Office of Storm Recovery, worked with program staff to establish compliant design and implementation of the CDBG-DR- funded housing recovery program.

- Repair, reconstruction, reimbursement and elevation of residential owner-occupied structures funded with \$1.85 billion of CDBG-DR funds. Program assisted over 11,000 households including 3,036 elevations.
- Set program priorities, developed policies and procedures, and ensured compliance with HUD regulations, 2 CFR 200, and local laws.
- Provided training and technical assistance to program staff, case workers, and vendors.
- Created eligibility and duplication of benefits frameworks that could scale quickly while withstanding audit scrutiny.
- After identifying need for an additional pathway, worked with program staff and legal to develop a program-led construction option for applicants who were unable to self-manage the construction.

Proposed Labor Category

Project Lead (Key Personnel) – All Tasks

Proposed Task Areas

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

Education

- M.A.S, Environmental Science, University of Sydney, Australia, 2003
- B.A., Psychology, Colgate University, Hamilton, NY, 2002



- Facilitated cross-departmental collaboration to troubleshoot issues, ensure compliance, and strengthen coordination of recovery efforts.

PROFESSIONAL EXPERIENCE

Independent Consultant (Sept 2024 – May 2025)

Advised state and local governments on program design, regulatory interpretation, grant compliance, and funding opportunities.

- Designed a managed retreat program, including a gap analysis to leverage existing resources
- Drafted a CDBG-DR Action Plan including analyzing impacts and mitigation needs
- Developed policies and procedures for HUD's HOME-ARP funding

Hill International, Inc. (July 2023 – Sept 2024)

Vice President

- Served as Subject Matter Expert (SME) in housing, resiliency, grant management, and program management.

Aptim Environmental & Infrastructure LLC (APTIM) (February 2022 – July 2023)

Disaster Recovery Program Director

- Provided program evaluation, grant and regulatory compliance, and policy strategies support to state and local government clients including New York City Housing Authority (NYCHA), Paradise, CA Irrigation District, and Rebuild by Design.

New York Governor's Office of Storm Recovery (GOSR) (February 2015 – January 2022)

Chief Policy and Research Officer (7/2018 – 1/2022)

Managing Director of Policy (2/2015 – 7/2018)

- Co-chief executive responsible for day-to-day operations, design and implementation of programs, compliance, and ensuring budget was aligned with agency's goals.
- Developed and operationalized the agency's policies and procedures for 17 programs funded with \$4.6 billion of CDBG-DR funds.
- Determined funding priorities and established program objectives and measures of success.
- Established processes for cross-departmental collaboration to ensure compliance, assess program effectiveness, and troubleshoot key challenges.
- Coordinated and responded to auditors and established corrective action plans to address findings. Negotiated a repayment down from \$58.7 million to \$2.5 million
- Designed and implemented close out procedures for over 300 projects, 17 programs, and 3 grants.
- Spearheaded the creation of a permanent New York State office responsible for the administration of federal grants as well as State-funded programs addressing climate risk.
- Facilitated in scaling capacity of the agency to 200 staff and established systems and processes to meet its evolving needs.
- Built and grew relationships with representatives of federal agencies, State agencies, and elected officials.
- Developed a grant application using data to show climate risk and vulnerabilities which secured \$35.8 million to enhance the resilience of Public Housing Authorities.
- Monitored and analyzed legislative and regulatory changes ensuring compliance with federal, state, and local laws.
- Oversaw internal and external reporting on program status, budgets, and beneficiaries.



- Through the NY Governor’s Office, aided the Puerto Rican government in identifying recovery need and advocated the federal government resulting in more than \$60 billion of funding for rebuilding.

New York City Office of Management and Budget (OMB) (May 2013 – February 2015)

Unit Head – Program and Policy

- Advised on program design, interpreted regulations and guidance, developed policies and procedures for a portfolio of housing, economic development, infrastructure, and coastal resiliency programs funded with \$4.4 billion of CDBG-DR funds.
- Provided supervision and trained a team of six analysts responsible for development of program procedures, policy analysis, budget planning, grant compliance, monitoring, reporting, and environmental review.
- Helped win a first of its kind federal grant that provided \$176 million for the implementation of two coastal protection projects.
- Performed overall grant management functions including regulatory interpretation, monitoring of program performance and budgets, reporting, and procurement and contract oversight.
- Developed standard operating procedures and training for compliance with procurement, Davis Bacon and Related Acts, Section 3, NEPA, national objective and eligible activity determinations, reporting, and the citizen participation plan.
- Managed monitoring visits including prepping City agency staff and responding to any findings.

Lower Manhattan Development Corporation (LMDC) (April 2007 – May 2013)

Planning Project Manager

- Managed projects supporting September 11, 2001 recovery and revitalization of Lower Manhattan funded with \$2.8 billion of CDBG-DR funds.
- Oversaw over 30 subrecipients and vendors to achieve project completion within scope, regulatory compliance, objectives, and budget
- Reviewed funding applications, monthly status reports, labor reports, procurements, and invoices to ensure compliance
- Worked with other State and New York City government agencies to establish project goals, timelines, and efficiently coordinate all the construction projects occurring in Lower Manhattan
- Directed and managed vendors who performed program management, construction management, inspections, cost estimation, design, environmental review, and legal services.

ADDITIONAL EXPERIENCE

As a CDBG-DR grantee, designed and implemented programs that helped:	
Housing repair/reconstruction/reimbursement	22,831 households
Elevations	4,472 houses
Buyout/Acquisition	700 houses
Multi-family (5+) repair/reconstruction/reimbursement	19,300 units
Affordable Housing/PHA - new construction, rehab, match	23,324 units
Economic Revitalization	11,068 businesses
Infrastructure/Mitigation projects	380 projects



Omar Ahmad

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Mr. Ahmad is a consultant with CohnReznick Government and Public Sector Advisory and has six years of experience in public audit, program compliance, performance monitoring, system analysis and implementation, process improvement, fraud risk management, quality management, and audit and consulting services to state and federal government clients, public audit, supporting multiple Federal agencies in auditing, compliance and consulting engagements.

Expertise in audit and compliance, quality control and assurance, client communication, system implementation, process improvement, compliance reviews, and policy and procedure development and documentation.

Experience providing support to states with federally-funded disaster recovery and state-funded programs, with a focus on Community Development Block Grant (CDBG) programs and FEMA funds, including the client Louisiana Office of Community Development/Disaster Recovery Unit (OCD/DRU) in the wake of the Great Floods of 2016 & 2020 and Texas Department of Housing and Community Affairs which provided housing rental relief affected by COVID-19. He has also worked on the Texas Water Development Board to analyze the program's current systematic approach and evaluating current processes to provide process improvement methodologies.

EXPERIENCE

Staff Manager (September 2017 - Present)

Restore Louisiana 2016 & 2020

Restore Louisiana was initially established to assist homeowners impacted by the March and August 2016 Floods and has now expanded to include homeowners impacted by Hurricanes Laura, Delta, Ida and the May 2021 Severe Storm. Restore Louisiana is dedicated to helping homeowners recover from federally declared disasters. The program is administered by the Louisiana Office of Community Development (OCD) and funded by the U.S. Department of Housing and Urban Development (HUD) through federal appropriations of Community Development Block Grant-Disaster

Proposed Labor Category

Project Lead (Key Personnel) – All Tasks

Proposed Task Areas

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13. Relocation Program (URA/TRA) Development and Compliance Support
14. Communication, Public Information, and Outreach Support
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- Graduate Certificate, Forensic Accounting, George Mason University
- B.S., Accounting, George Mason University



Recovery (CDBG-DR) funds. Contracted to develop and implement Compliance and Monitoring plans and support contractor transitions for more than \$14.3 billion of CDBG-DR Programs.

Develop and execute monitoring/testing procedures to test compliance in accordance with the policies and procedures developed for the RESTORE Program, as well as with applicable published Action Plans, with federal and State regulations; audit readiness and preparation for HUD; programmatic and contractual requirements.

- Manages service level deliverables and reports performance measurements, including providing timely responses to ongoing Program service requirements.
- Creating monitoring letters for service deliverables procedures not met or incorrectly performed by subcontractor based on the policy and procedures set forth in the Program guidelines.
- Providing guidance and training to team members to enhance their understanding of compliance monitoring and obligations.
- Perform operational assessments and develop policy and procedures. Assist in the continued development of policies and procedures that ensure that the Program is operated in an accurate, efficient, effective and accountable manner.
- Evaluate impacts of detected fraud, waste, and abuse. Also assist in developing and managing internal quality control processes.

Staff Manager (February 2021 – Present)
Texas Water Development Board (TWDB)

TWDB works to ensure Texans have access to sufficient, clean, and affordable water supplies that foster a healthy economy and environment. collecting and disseminating water-related data; assisting with regional water supply and flood planning that contributes to preparing the state water plan and state flood plan; and administering cost-effective financial programs for constructing water supply, wastewater treatment, flood control, and agricultural water conservation projects. Perform assessment on policy accounting policies and procedures that have been established for TWDB and to assist employees as they work to achieve the objectives set by the organization.

- Assisting in documenting financial policies and procedures related to their day-to-day operations.
- Assessing options for implementing ongoing and structured training programs to assist with staff onboarding, transitions, and professional growth.
- Assisting client to develop and implement process for monitoring loan covenants for compliance with applicable regulations, reconciling monthly payables and revenues.
- Assisting client to develop and implement process for reconciling payables monthly and tracking revenues on an accrual basis for better adherences to GAAP.
- Developing a Risk Assessment and Business Impact Analysis (BIA) process to identify potential threats and their impact.

Staff Manager (April 2021 – December 2021)
Texas Department of Housing and Community Affairs (TDHCA)

TDHCA is responsible for administration not the Texas Rental Relief Program (TRRP) which provides emergency funds to help eligible Texas renters pay rent and utility bills (including past due rent and utilities). CohnReznick has been contracted by TDHCA to help administer this program by reviewing applications submitting by tenants and landlords in the Neighborly system.



- Providing Quality Assistance and Quality Control and performing eligibility reviews based on the Program policies and procedures.
- Assistance in implementing comprehensive compliance monitoring performance aligned with regulatory requirements.
- Providing guidance and training to team members to enhance their understanding of compliance monitoring and obligations.
- Verifying analysis of daily data analytics and assessment of program applications set forth in the Program guidelines.
- Performing Fraud Waste and Abuse risk analysis of irregular applications and identifying fraudulent behavior(s). Identified these gaps and recommended corrective actions.
- Monitoring and tracking regulatory and program guidance changes to ensure ongoing compliance.



Briana Levens

Director | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Levens has nearly nineteen years of project management, federal program implementation, grant administration, and compliance monitoring experience. Most recently, Ms. Levens has led the Project Management Office for the Relocation Payment Clearinghouse, whereby CohnReznick designed, implemented, and executed one of the most highly technical government reimbursement programs in an efficient and effective manner: invoicing, collecting, and paying nearly \$13 billion in incentive payments and reimbursement claims in a little over 3 years.

In this role, she led the development and implementation of over 80 policies/ procedures and SOPs; oversaw program activities by the tracking of over 28,000 tasks; enabled cross-functional change management and quality control protocols; and onboarded and trained nearly 170 CohnReznick and subcontractor personnel. As PMO Lead, she also defined the technical strategy and requirements to establish a scalable infrastructure to enable real-time performance tracking of over 81,000 claim line items via Power BI reports and dashboards, execute fraud, waste, and abuse monitoring and detect potential duplication of benefits. This led to the identification of nearly \$150 million in duplicate or ineligible claims.

Ms. Levens' deep expertise has enabled the successful deployment of processes and tools that closed operational gaps, eliminated redundancies, and enhanced efficiency across multiple CDBG-DR clients:

- In the aftermath of Superstorm Sandy, she executed risk assessments and conducted integrity monitoring for the State of New Jersey's \$4.2B CDBG-DR homeowner, rental, economic development, infrastructure, and supportive services programs.
- Following Hurricanes Gustav, Ike, Katrina and Rita, she supported the execution of high-value procurements and designed/ implemented compliance and monitoring procedures, checklists, tools and systems for State of Louisiana's \$13B CDBG-DR programs.
- To assist with the post-Katrina recovery in her home state, she conducted QA/QC audits, supported data-driven quality improvement efforts, and assisted lenders and applicants throughout the post-closing process under the \$2.5B CDBG-DR Homeowners Assistance and Elevation Grant Programs.

Proposed Labor Category

Project Lead (Key Personnel) – All Tasks

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
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11. Technical and Engineering Support for Infrastructure and Housing Projects
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13. Relocation Program (URA/TRA) Development and Compliance Support
14. Communication, Public Information, and Outreach Support
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- M.B.A, Millsaps College
- B.S., Business Administration, Millsaps College

Certifications

- Certified Project Management Professional (PMP)



EXPERIENCE

Reporting Support (November 2024 – August 2025) **Capital Good Fund (Georgia Bright)**

CohnReznick is engaged by the client to provide advisory services and assisting with the revision/ development of policies and procedures, template and tools in the following areas: accounting, finance, and controls; subrecipient and contractor monitoring and compliance; cost categorization and program reporting.

- Evaluated financial management systems, tools and reporting functionality to develop recommendations to effectively produce required reports to the EPA.
- Developed tools to enable the data capture and execute weekly financial budget-to-actual performance reporting.

PMO Lead/Director (October 2021 – August 2025) **Relocation Payment Clearinghouse**

CohnReznick served as FCC's Relocation Payment Clearinghouse (RPC) responsible for managing the collection and distribution of \$13 billion of spectrum relocation funds encompassing 5,684 licenses to be relocated. CohnReznick is responsible for: (1) engaging in strategic planning and adopt goals and metrics to evaluate its performance, (2) adopting internal controls for its operations, (3) using enterprise risk management practices, and (4) using best practices to protect against improper payments and to prevent fraud, waste, and abuse in its handling of funds.

- Established and implement processes, systems, and tools to enable claim processing, reporting, identification of potential fraud, waste, and abuse, duplication of benefits, task management, system change management, quality control, audit readiness, policy and procedure development, communications, and outreach.
- Maintained oversight of critical PMO activities, including user access, data management/reporting, policy/ procedure maintenance, outreach, training, system change control.

PMO Senior Manager (March 2018 – May 2020) **Texas Division of Emergency Management (TDEM)**

CohnReznick is currently engaged with the State of Texas to administer the State's FEMA Disaster Recovery Grant Programs.

- Provided project management services to support the team of nearly 80 staff providing operational assistance to the State's over 1500 grant recipients.
- Coordinated budgeting, reporting and invoicing of over 9,300 Public Assistance, Hazard Mitigation, Fire Mitigation, and Pre-Disaster Mitigation Projects.
- Coordinated process improvement activities to promote efficiency in the administration of the disaster recovery programs.

Manager (June 2015 – September 2021) **U.S. Department of Energy**

CohnReznick is currently engaged under a Blanket Purchase Agreement with the U.S. Department of Energy to provide various contract audit services to its field offices.

- Provided project management services covering 14 field offices and nearly 300 audits;
- Established data collection and reporting processes to enable performance reporting.
- Developed work plans, budgets, and staffing assignments for the following types of audits



- Proposal and Incurred Cost Audits to evaluate the reasonableness, allowability and allocability of direct and indirect costs;
 - Accounting and Estimating System Audits;
 - Disclosure Statement Audits; and
 - Internal controls audits; and
 - Evaluation of compliance with contractual requirements, laws and regulations.
- Monitored audit budgets and coordinate required modifications; and

Project Manager (September 2016 – December 2018)

National Fish and Wildlife Foundation

In early 2013, a U.S. District Court approved two plea agreements resolving certain criminal cases against BP and Transocean which arose from the 2010 Deepwater Horizon explosion and oil spill. The agreements direct a total of \$2.544 billion to the National Fish and Wildlife Foundation (NFWF) to fund projects benefiting the natural resources of the Gulf Coast that were impacted by the spill, administered through the Gulf Environment Benefit Fund.

CohnReznick provided co-sourced internal audit services to establish and implement an internal audit program to substantiate that the expenditures were made as claimed and to verify that these expenditures were within the scope of the project and identifiable in the budget.

- Designed and implemented an audit program to substantiate allowability and allocability of expenditures
- Coordinated with NFWF to execute expenditure reviews for six pilot projects, totaling \$158 million in expenditures
- Analyzed 100% of the requests for reimbursement submitted to NFWF for the pilot projects
- Reviewed NFWF funding agreements, recipient contracts, and supporting documentation
- Conducted site visits at the recipients' locations
- Executed test sheets to document internal controls and verify salary/benefits, equipment, materials, supplies, travel, printing, contractual and indirect costs
- Prepared reports to summarize results, which were submitted to the NFWF Senior Management and Audit Committee.

Project Manager (November 2013 – June 2015)

State of New Jersey Department of Community Affairs- Sandy Recovery Division (NJ DCA-SRD)

CohnReznick was contracted by the NJ DCA-SRD to provide integrity monitoring oversight of \$1.83 billion in Community Development Block Grant Disaster Recovery (CDBG-DR) housing, economic development, and planning and infrastructure programs.

- Assisted with the development of a Comprehensive Compliance, Monitoring, and Fraud Prevention Plan that outlined CohnReznick's integrity monitoring approach for verifying compliance, detecting misconduct, and promoting best practices in the administration of Superstorm Sandy recovery and rebuilding projects;
- Assisted with the design of a Program Risk Assessment to evaluate programs based on targeted risk criteria to identify high risk programs and prioritize monitoring efforts;
- Conducted semi-annual risk assessments of NJ DCA-SRD's programs; and
- Performed integrity oversight monitoring of multiple CDBG-DR programs, including: performed walkthroughs of operational processes; developed and executed test plans to compare regulatory requirements and policies to implemented processes; reported observations; and provided recommendations for improvement.



Project Manager (March 2013 – June 2015)

Louisiana Housing Corporation (LHC) Staffing Assessment/ Process Improvement Services

CohnReznick was contracted by LHC to provide technical assistance and subject matter expertise to assist LHC in maximizing staff resources and developing a system for the efficient delivery of LHC's programs and services, including its CDBG-DR Rental Programs.

- Executed engagement planning and monitoring, client communication, client deliverables, and ensuring programs are compliant with contract requirements and are completed on time and on budget;
- Engaged in hands-on assessment of the LHC Asset Management Department processes;
- Conducted interviews with key staff and reviewing documented processes to understand current processes;
- Drafted reports to summarize the results of the interviews and provide recommendations for process improvement, which include examples of proposed organizational structure changes, process flows, and templates;
- Worked with LHC management to determine improvement priorities and feasibility of implementation of process improvement recommendations; and
- Coordinated the development of business system requirements and implementation of Louisiana Housing Corporation's Online Application System utilized to process over 100 applications and \$20 million in Low-Income Housing Tax Credit, HOME, Mortgage Revenue Bond, and/or CDBG awards.
- Implemented LHC's Online Application by developing policy manuals and user guides, and conducting testing, pilots, and internal and external training.

Business Analyst / SME (June 2009 – July 2014)

State of Louisiana Office of Community Development Disaster Recovery Unit (OCD/DRU)—Staff Augmentation/Compliance and Monitoring

CohnReznick was contracted by OCD/DRU to develop and implement compliance and monitoring plans for more than \$13 billion of CDBG DR-funded programs including compliance monitoring and contractor monitoring plans, for the Gustav/Ike Parish Implemented Program and 13 of the State's Katrina/Rita CDBG Disaster Recovery Programs.

- Defined performance monitoring milestones and developed tools to track the performance of hundreds of infrastructure, housing, and planning projects;
- Performed process improvement and staffing analysis and provided related recommendations;
- Assisted in the development of the Disaster Recovery CDBG Grantee Administrative Manual;
- Assisted in the implementation of long-term compliance and monitoring plans and checklists for OCD/DRU, including the design of a tracking, and reporting system;
- Analyzed OCD/DRU file management policies and procedures and provided process improvement recommendations to OCD/DRU; and
- Assisted with transitioning the operations of housing programs from OCD/DRU.

Business Analyst (September 2008 – June 2009)

State of Louisiana "Road Home" Program – Staff Augmentation/Contractor Transition

CohnReznick assisted OCD/DRU in the implementation and management of transition activities for the Homeowner and Small Rental Programs from one contractor to another, ensuring the transition activities were monitored and carried out in the most accurate, effective, and efficient manner.

CohnReznick provided program management, project organization, coordination, policy planning, administration, transition monitoring, and oversight for assuring the successful transition from the former Road Home program



contractor to the replacement contractors.

The CohnReznick team was responsible for: evaluating business operations and resources required to complete work in progress; developing transition requirements; developing Request for Proposals (RFPs) to solicit replacement contractors; providing support for proposal evaluations, contract awards, negotiations, and executions; developing a transition plan; managing the project and transition administration.

- Aided team in defining scope of services for replacement contractors for the “Road Home” programs by researching, developing and publishing RFPs that were fully compliant with the State’s Purchasing Rules and Regulations;
- Performed work-in-progress and staffing analyses which resulted in staffing and cost recommendations;
- Coordinated with the incumbent and incoming contractors on transition activities; and
- Prepared project plans, status reports, and issue logs.

Staff Associate (September 2006 – June 2008)

Mississippi Development Authority (MDA), Homeowners Assistance and Elevation Grant Program (HAP)

CohnReznick was the prime contractor for multiple MDA Disaster Recovery programs following Hurricane Katrina. CohnReznick provided program management and oversight for the distribution of federal block grant disaster recovery funds for the MDA Homeowner Assistance Program, Small Rental Assistance Program, Elevation Grant Program, and Long-Term Workforce Housing Programs. Reznick Group developed procedures and protocols to evaluate and process applications and award grant funds; implemented grants management systems; established application intake centers; hired and trained more than 300 local Mississippians; ensured compliance with federal and state regulations; and provided a means to track and monitor the program and prevent fraud, waste, and abuse. Reznick Group was directly involved in the distribution of more than \$2.5 billion under this program. The programs’ structure, personnel, and process were multi-focused, having oversight and responsibility for the seamless integration of HUD, FEMA, SBA, and state policy requirements.

- Performed quality assurance/quality control operational audits;
- Participated in detailed quality improvement projects, tested and analyzed data, classified results, and documented findings;
- Assisted in restructuring the Eligibility Department’s procedures to meet specific deadlines and goals set by management;
- Employed Microsoft Word, Excel, PowerPoint, and Visio to provide reports to management and peers;
- Provided customer service to grant applicants;
- Assisted lenders and applicants through the post-closing process, including resolving property title issues; and
- Provided data entry into a Microsoft Access database for grant processing records.



Emily Alexiou

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Alexiou has nearly 20 years of project management, consulting and public policy experience. Emily serves as the Project Management Office Lead for four major government contracting engagements, coordinating with sixteen field offices and more than 60 staff to successfully execute over 700 contract audits to-date.

Emily has expertise in project management, policy, program compliance and operational consulting services for governmental and nonprofit clients. She has led implementation of dashboard reporting processes and tools designed to minimize, reduce gaps in processes, duplicative efforts, and defective operational functions. She has developed dashboard reporting for audit managers, partners, and project management personnel to track real time schedule, resource management and budget progression of all DOE audits, as well as LaGuardia and John F. Kennedy Airports Project Management Offices.

EXPERIENCE

Senior Manager (July 2022 – Present)

Office of the Inspector General of the Port Authority of New York and New Jersey

CohnReznick was engaged by the Office of the Inspector General of the Port Authority of NY & NJ to jointly serve as Integrity Oversight Monitors on the \$13 billion John F. Kennedy International Airport Redevelopment program.

- Project Management Office Lead for Integrity Monitoring team.
- Day-to-day engagement planning and implementation.
- Provide quality control review to ensure contractual compliance reports for consistency and quality reporting.
- Manage and review monthly MWBE reporting for twenty-six subcontractors.
- Compile and update monthly projections for 50+ internal staff and MWBE subcontractors.
- Prepare budgeting spreadsheets and monthly budget to actuals analysis.
- Develop project processes, procedures, and Standard Operating Procedures.

Proposed Labor Category

Senior Grant Manager – All Tasks

Proposed Task Areas

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

Education

- Master of Social Work/Public Policy, New York University, Silver School of Social Work
- Master of Education, George Washington University, Washington D.C.
- B.S., Marketing and International Business, New York University

Certifications

- Certified Project Management Professional (PMP)
- OSHA 30

Clearances

- Public Trust



Senior Advisor (April 2025 – Present)

City of Chicago Office of Inspector General O'Hare 21 Redevelopment Program at Chicago's O'Hare International Airport

The City of Chicago Office of Inspector General engaged CohnReznick to provide Expert Professional Integrity Monitoring services for its O'Hare 21 Plan, an \$8.5 billion capital improvement plan for Chicago O'Hare International Airport. Our role is to work with the Chicago Department of Aviation (CDA), the City and the Office of Inspectors General to review policies and procedures and recommend and implement best practices to prevent fraud, waste and abuse.

- Assist in managing a team of investigative, engineering, and forensic accounting professionals.
- Manages and maintains investigators' weekly monitoring schedule and tracks progress of tasks.
- Plans and reviews memos regarding investigations and reviews.
- Prepares quarterly budgeting spreadsheets and reporting and monthly budget to actuals analysis.
- Develops project processes and procedures and Standard Operating Procedures.

Senior Project Manager (October 2024 – August 2025)

Cybersecurity and Infrastructure Security Agency

CohnReznick was engaged by the Cybersecurity and Infrastructure Agency to develop high-level dashboards, visualizing data, and reporting of the overall financial performance and risk exposure. Serves as lead member of the project management office for two blanket purchase agreements of contract audit services.

- Create a project plan with detailed timelines and milestones and develop weekly reporting client facing dashboards.
- Conduct stakeholder meeting to gather detailed requirements, document functional and non-functional requirements and define key performance indicators and metrics.
- Develop wireframes and mockups of the dashboard and plan the architecture and commercially available off-the-shelf technology stack to be used.
- Conduct unit testing, integration testing, and system testing; perform user acceptance testing with stakeholders and resolve identified gaps, performance issues, and/or bugs.
- Deploy the dashboard to the production environment, provide comprehensive training sessions for end-users, develop, and publish user manuals and standard operation procedures.

Project Manager (April 2024 – April 2025)

Project Ascend, ERP Implementation, ProFinda

- Served as member of the Project Ascend Project Management Office for ERP Implementation and Project Ascend / Profinda Cutover Lead.
- Managed all Profinda Open Items and updates for Resource Management Lead and Resource Managers.
- Coordinated among Resource Management team members and Profinda Project team members to ensure UAT testing and resourcing needs are completed.
- Review and validation of PowerBI reports and planning dashboards.
- Prepared AI Planner and Budget data files in preparation for SIT testing.
- Developed and finalized training materials and job aids for end users.
- Documentation of end-to-end business processes; drafts Standard Operating Procedures (SOPs) and Service Level Agreements. Preparation for Resource Management summit in September 2024.

**Project Manager (September 2023 – October 2024)****City of Atlanta, Mayor's Office of International and Immigrant Affairs (MOIIA), Emergency Food and Shelter Program-Humanitarian (EFSP-H)**

CohnReznick was engaged by the City of Atlanta Mayor's Office of International and Immigrant Affairs (MOIIA) to support the City of Atlanta with project management and oversight monitoring for migrant crisis federal funding opportunities such as the Emergency Food and Shelter Program-Humanitarian (EFSP-H) and Sheltering Support Program (SSP), totaling in over \$11M allocated in congressional appropriations.

- Consulted with the MOIIA's Director and Senior Policy and Partnership Manager to provide guidance on compliance of federal and grants program standards.
- Defined and developed standardized guidelines for the subrecipient document management.
- Developed and maintained subrecipient applications and reporting tools.
- Weekly subrecipient compliance reporting and submission to Mayor's Chief of Staff.
- Developed SOPs to ensure compliance with federal, state, and local laws and regulations.
- Compiled Resource Guide and Staffing Plans to include contact and resource matrices, as well as partner profiles.
- Maintained and hosted virtual environment for all documentation, including contracts, SOPs, and risk assessments.

Senior Manager (November 2019 – October 2024)**Office of the Inspector General of the Port Authority of New York and New Jersey**

CohnReznick was engaged in 2015 by the Office of the Inspector General of the Port Authority of NY & NJ to perform expert integrity monitoring services of the \$2+ Billion construction of the LaGuardia Airport Redevelopment Program – Central Terminal Replacement Project over a seven-year period.

- Conducted quality control reviews to ensure compliance with contractual requirements and report on MWBE subcontractor and invoicing data.
- Developed project processes and procedures and assisted with engagement planning and implementation.
- Provided quality control support for consistency and quality reporting.
- Monitored and tracked progress of tasks and maintain monitoring schedule.
- Maintained billing and collection tracking for client and MWBEs.
- Prepared quarterly budgeting spreadsheets and monthly budget to actuals analysis.
- Led client invoicing preparation and submission.



Orterio Villa

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Orterio is a Senior Manager within the CohnReznick Government and Public Sector. He has 16 years of experience in project management, IT and reporting/analytics directly related to disaster recovery.

Since joining CohnReznick in 2018, his focus has been on supporting OCD Reporting and Data Analytics associated with Restore Louisiana Program 2016, Emergency Rental Assistance Program (ERAP), Restore Louisiana Program 2020 and other projects as requested.

These reporting efforts have included managing the CohnReznick reporting team, the use of Business Objects, the implementation of processes using Python/ML and other tools to improve efficiency and accuracy, and the implementation and use of Power BI to support Restore Louisiana Program 2020, to name a few.

EXPERIENCE

Senior Manager - IT Reporting (Aug 2018 – Present)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD) | Restore Louisiana Homeowner Assistance Program 2016 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the RLHP 2016 Program. This Program was designed to help homeowners repair or rebuild their homes that were damaged by State disaster in 2016.

- Primary focus is reporting, projections, analytics, and compliance monitoring support for Louisiana OCD Housing Recovery Programs; Restore 2016.
- Reporting on the Louisiana Emergency Rental Assistance, and the Housing Assistance Fund Programs.
- Supported improved confidence in reporting and initiated additional reporting that provided actionable insight and supported OCD management and reporting needs.
- Implementation of new reporting tools, including Power BI. CohnReznick's reporting team supported the implementation of the

Proposed Labor Category

Data Manager, PMO (Key Personnel) – All Tasks

Proposed Task Areas

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

Education

- U.S. Naval Nuclear Power School & Prototype

Certifications

- Louisiana POST
- DMAIC 6 Sigma training
- PMBOK Training & certification by PMCC Tech



Power BI, while implementing reports for the new Restore 2016 recovery Program.

Senior Manager - IT Reporting (May 2022 – Present)

The Louisiana Division of Administration, Office of Community Development (OCD), Disaster Recovery Unit | Restore Louisiana Homeowner Assistance Program 2020 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide QA/QC consulting services for the RLHP 2020 Program. This Program was designed to help homeowners repair or rebuild their homes that were damaged by 4 separate State disasters in 2020 and 2021.

- Primary focus is reporting, projections, analytics, and compliance monitoring support for Louisiana OCD Housing Recovery Programs; Restore 2016 and Restore 2020.
- Reporting on the Louisiana Emergency Rental Assistance, and the Housing Assistance Fund Programs.
- Supported improved confidence in reporting and initiated additional reporting that provided actionable insight and supported OCD management and reporting needs.
- Implementation of new reporting tools, including Power BI. CohnReznick's reporting team supported the implementation of the Power BI, while implementing reports for the new Restore 2020 recovery Program.

PRIOR WORK EXPERIENCE

Manager Business Intelligence / Project Manager (May 2007 - Jun 2009)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD) | The Louisiana Road Home Program

Implemented BI and reporting solutions for the \$13B Road Home Program to aid victims of hurricanes Katrina and Rita. Managed a staff of 21 professionals who implemented Business Objects as the business intelligence (BI) solution which supported issuing 2,500 monthly reports, responding to ad-hoc reporting and supported analytics requests. Assisted in the process-design and documentation for the \$750M HMGP follow-on grant program.



Alexander Rigney

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Alex Rigney is a data analyst and Python programmer who creates and manages processes to download, wrangle, and report on program data. This creates replicable and efficient reporting that program managers can trust when making decisions or reviewing progress. Mr. Rigney:

- Works with a team to understand and map out program data, process flows, and where any gaps might exist.
- Creates scripts that collect and wrangle data using tools such as Selenium for Robotic Process Automation (RPA) or Application Programming Interfaces (APIs).
- Reviews program requirements and applies those requirements to relevant data. This information is then incorporated into automated reports which give decision makers daily updates on program compliance and health.
- Creates and reports on metrics that are used to evaluate the status of the program and what progress has been made.

EXPERIENCE

Senior Consultant (Sept 2021 – Present)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Created scripts to automate certain time consuming data entry processes
- Created scripts to download and transform data used for reporting
- Created reports on the status of the program.

Proposed Labor Category

PMO Reporting Specialist – All Tasks

Proposed Task Areas

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

Education

- M.P.Aff., The LBJ School of Public Affairs at the University of Texas, Austin
- B.A., Government, The University of Texas at Austin
- A.A., Government, Austin Community College

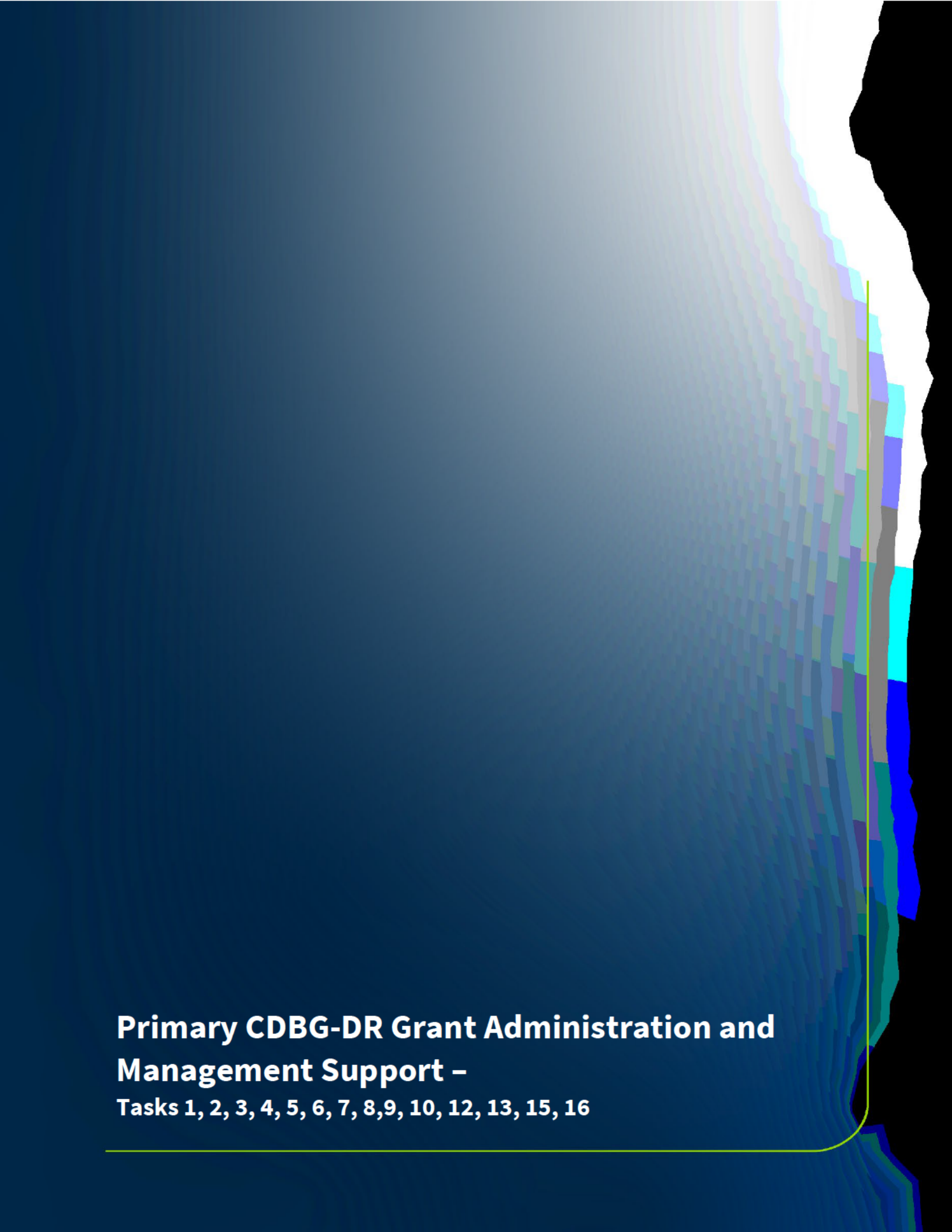


Senior Consultant (July 2021 – Present)

Massachusetts Emergency Management Administration (MEMA)

CohnReznick performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the Commonwealth of Massachusetts for COVID-19. Our team is responsible for applicant outreach, training, technical assistance, and performing project reviews. During this engagement, we have also developed a grant management system solution utilizing Commonwealth's SharePoint platform.

- Created scripts to download and transform data used for reporting
- Created reports on the status of the program
- Managed a Microsoft SharePoint site that supports program staff.



Primary CDBG-DR Grant Administration and Management Support –

Tasks 1, 2, 3, 4, 5, 6, 7, 8,9, 10, 12, 13, 15, 16



Briana Levens

Director | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Levens has nearly nineteen years of project management, federal program implementation, grant administration, and compliance monitoring experience. Most recently, Ms. Levens has led the Project Management Office for the Relocation Payment Clearinghouse, whereby CohnReznick designed, implemented, and executed one of the most highly technical government reimbursement programs in an efficient and effective manner: invoicing, collecting, and paying nearly \$13 billion in incentive payments and reimbursement claims in a little over 3 years.

In this role, she led the development and implementation of over 80 policies/ procedures and SOPs; oversaw program activities by the tracking of over 28,000 tasks; enabled cross-functional change management and quality control protocols; and onboarded and trained nearly 170 CohnReznick and subcontractor personnel. As PMO Lead, she also defined the technical strategy and requirements to establish a scalable infrastructure to enable real-time performance tracking of over 81,000 claim line items via Power BI reports and dashboards, execute fraud, waste, and abuse monitoring and detect potential duplication of benefits. This led to the identification of nearly \$150 million in duplicate or ineligible claims.

Ms. Levens' deep expertise has enabled the successful deployment of processes and tools that closed operational gaps, eliminated redundancies, and enhanced efficiency across multiple CDBG-DR clients:

- In the aftermath of Superstorm Sandy, she executed risk assessments and conducted integrity monitoring for the State of New Jersey's \$4.2B CDBG-DR homeowner, rental, economic development, infrastructure, and supportive services programs.
- Following Hurricanes Gustav, Ike, Katrina and Rita, she supported the execution of high-value procurements and designed/ implemented compliance and monitoring procedures, checklists, tools and systems for State of Louisiana's \$13B CDBG-DR programs.
- To assist with the post-Katrina recovery in her home state, she conducted QA/QC audits, supported data-driven quality improvement efforts, and assisted lenders and applicants throughout the post-closing process under the \$2.5B CDBG-DR Homeowners Assistance and Elevation Grant Programs.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 1

Senior Grant Manager – Task Area 2

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
5. Action Plan Development and Amendments
10. Audit Readiness and Monitoring Support
15. Grant Management
16. Technical Systems Specification & Project Management

Education

- M.B.A, Millsaps College
- B.S., Business Administration, Millsaps College

Certifications

- Certified Project Management Professional (PMP)



EXPERIENCE

Reporting Support (November 2024 – August 2025)

Capital Good Fund (Georgia Bright)

CohnReznick is engaged by the client to provide advisory services and assisting with the revision/ development of policies and procedures, template and tools in the following areas: accounting, finance, and controls; subrecipient and contractor monitoring and compliance; cost categorization and program reporting.

- Evaluated financial management systems, tools and reporting functionality to develop recommendations to effectively produce required reports to the EPA.
- Developed tools to enable the data capture and execute weekly financial budget-to-actual performance reporting.

PMO Lead/Director (October 2021 – August 2025)

Relocation Payment Clearinghouse

CohnReznick served as FCC's Relocation Payment Clearinghouse (RPC) responsible for managing the collection and distribution of \$13 billion of spectrum relocation funds encompassing 5,684 licenses to be relocated. CohnReznick is responsible for: (1) engaging in strategic planning and adopt goals and metrics to evaluate its performance, (2) adopting internal controls for its operations, (3) using enterprise risk management practices, and (4) using best practices to protect against improper payments and to prevent fraud, waste, and abuse in its handling of funds.

- Established and implement processes, systems, and tools to enable claim processing, reporting, identification of potential fraud, waste, and abuse, duplication of benefits, task management, system change management, quality control, audit readiness, policy and procedure development, communications, and outreach.
- Maintained oversight of critical PMO activities, including user access, data management/reporting, policy/ procedure maintenance, outreach, training, system change control.

PMO Senior Manager (March 2018 – May 2020)

Texas Division of Emergency Management (TDEM)

CohnReznick is currently engaged with the State of Texas to administer the State's FEMA Disaster Recovery Grant Programs.

- Provided project management services to support the team of nearly 80 staff providing operational assistance to the State's over 1500 grant recipients.
- Coordinated budgeting, reporting and invoicing of over 9,300 Public Assistance, Hazard Mitigation, Fire Mitigation, and Pre-Disaster Mitigation Projects.
- Coordinated process improvement activities to promote efficiency in the administration of the disaster recovery programs.

Manager (June 2015 – September 2021)

U.S. Department of Energy

CohnReznick is currently engaged under a Blanket Purchase Agreement with the U.S. Department of Energy to provide various contract audit services to its field offices.

- Provided project management services covering 14 field offices and nearly 300 audits;
- Established data collection and reporting processes to enable performance reporting.
- Developed work plans, budgets, and staffing assignments for the following types of audits



- Proposal and Incurred Cost Audits to evaluate the reasonableness, allowability and allocability of direct and indirect costs;
 - Accounting and Estimating System Audits;
 - Disclosure Statement Audits; and
 - Internal controls audits; and
 - Evaluation of compliance with contractual requirements, laws and regulations.
- Monitored audit budgets and coordinate required modifications; and

Project Manager (September 2016 – December 2018)

National Fish and Wildlife Foundation

In early 2013, a U.S. District Court approved two plea agreements resolving certain criminal cases against BP and Transocean which arose from the 2010 Deepwater Horizon explosion and oil spill. The agreements direct a total of \$2.544 billion to the National Fish and Wildlife Foundation (NFWF) to fund projects benefiting the natural resources of the Gulf Coast that were impacted by the spill, administered through the Gulf Environment Benefit Fund.

CohnReznick provided co-sourced internal audit services to establish and implement an internal audit program to substantiate that the expenditures were made as claimed and to verify that these expenditures were within the scope of the project and identifiable in the budget.

- Designed and implemented an audit program to substantiate allowability and allocability of expenditures
- Coordinated with NFWF to execute expenditure reviews for six pilot projects, totaling \$158 million in expenditures
- Analyzed 100% of the requests for reimbursement submitted to NFWF for the pilot projects
- Reviewed NFWF funding agreements, recipient contracts, and supporting documentation
- Conducted site visits at the recipients' locations
- Executed test sheets to document internal controls and verify salary/benefits, equipment, materials, supplies, travel, printing, contractual and indirect costs
- Prepared reports to summarize results, which were submitted to the NFWF Senior Management and Audit Committee.

Project Manager (November 2013 – June 2015)

State of New Jersey Department of Community Affairs- Sandy Recovery Division (NJ DCA-SRD)

CohnReznick was contracted by the NJ DCA-SRD to provide integrity monitoring oversight of \$1.83 billion in Community Development Block Grant Disaster Recovery (CDBG-DR) housing, economic development, and planning and infrastructure programs.

- Assisted with the development of a Comprehensive Compliance, Monitoring, and Fraud Prevention Plan that outlined CohnReznick's integrity monitoring approach for verifying compliance, detecting misconduct, and promoting best practices in the administration of Superstorm Sandy recovery and rebuilding projects;
- Assisted with the design of a Program Risk Assessment to evaluate programs based on targeted risk criteria to identify high risk programs and prioritize monitoring efforts;
- Conducted semi-annual risk assessments of NJ DCA-SRD's programs; and
- Performed integrity oversight monitoring of multiple CDBG-DR programs, including: performed walkthroughs of operational processes; developed and executed test plans to compare regulatory requirements and policies to implemented processes; reported observations; and provided recommendations for improvement.



Project Manager (March 2013 – June 2015)

Louisiana Housing Corporation (LHC) Staffing Assessment/ Process Improvement Services

CohnReznick was contracted by LHC to provide technical assistance and subject matter expertise to assist LHC in maximizing staff resources and developing a system for the efficient delivery of LHC's programs and services, including its CDBG-DR Rental Programs.

- Executed engagement planning and monitoring, client communication, client deliverables, and ensuring programs are compliant with contract requirements and are completed on time and on budget;
- Engaged in hands-on assessment of the LHC Asset Management Department processes;
- Conducted interviews with key staff and reviewing documented processes to understand current processes;
- Drafted reports to summarize the results of the interviews and provide recommendations for process improvement, which include examples of proposed organizational structure changes, process flows, and templates;
- Worked with LHC management to determine improvement priorities and feasibility of implementation of process improvement recommendations; and
- Coordinated the development of business system requirements and implementation of Louisiana Housing Corporation's Online Application System utilized to process over 100 applications and \$20 million in Low-Income Housing Tax Credit, HOME, Mortgage Revenue Bond, and/or CDBG awards.
- Implemented LHC's Online Application by developing policy manuals and user guides, and conducting testing, pilots, and internal and external training.

Business Analyst / SME (June 2009 – July 2014)

State of Louisiana Office of Community Development Disaster Recovery Unit (OCD/DRU)—Staff Augmentation/Compliance and Monitoring

CohnReznick was contracted by OCD/DRU to develop and implement compliance and monitoring plans for more than \$13 billion of CDBG DR-funded programs including compliance monitoring and contractor monitoring plans, for the Gustav/Ike Parish Implemented Program and 13 of the State's Katrina/Rita CDBG Disaster Recovery Programs.

- Defined performance monitoring milestones and developed tools to track the performance of hundreds of infrastructure, housing, and planning projects;
- Performed process improvement and staffing analysis and provided related recommendations;
- Assisted in the development of the Disaster Recovery CDBG Grantee Administrative Manual;
- Assisted in the implementation of long-term compliance and monitoring plans and checklists for OCD/DRU, including the design of a tracking, and reporting system;
- Analyzed OCD/DRU file management policies and procedures and provided process improvement recommendations to OCD/DRU; and
- Assisted with transitioning the operations of housing programs from OCD/DRU.

Business Analyst (September 2008 – June 2009)

State of Louisiana "Road Home" Program – Staff Augmentation/Contractor Transition

CohnReznick assisted OCD/DRU in the implementation and management of transition activities for the Homeowner and Small Rental Programs from one contractor to another, ensuring the transition activities were monitored and carried out in the most accurate, effective, and efficient manner.

CohnReznick provided program management, project organization, coordination, policy planning, administration, transition monitoring, and oversight for assuring the successful transition from the former Road Home program



contractor to the replacement contractors.

The CohnReznick team was responsible for: evaluating business operations and resources required to complete work in progress; developing transition requirements; developing Request for Proposals (RFPs) to solicit replacement contractors; providing support for proposal evaluations, contract awards, negotiations, and executions; developing a transition plan; managing the project and transition administration.

- Aided team in defining scope of services for replacement contractors for the “Road Home” programs by researching, developing and publishing RFPs that were fully compliant with the State’s Purchasing Rules and Regulations;
- Performed work-in-progress and staffing analyses which resulted in staffing and cost recommendations;
- Coordinated with the incumbent and incoming contractors on transition activities; and
- Prepared project plans, status reports, and issue logs.

Staff Associate (September 2006 – June 2008)

Mississippi Development Authority (MDA), Homeowners Assistance and Elevation Grant Program (HAP)

CohnReznick was the prime contractor for multiple MDA Disaster Recovery programs following Hurricane Katrina. CohnReznick provided program management and oversight for the distribution of federal block grant disaster recovery funds for the MDA Homeowner Assistance Program, Small Rental Assistance Program, Elevation Grant Program, and Long-Term Workforce Housing Programs. Reznick Group developed procedures and protocols to evaluate and process applications and award grant funds; implemented grants management systems; established application intake centers; hired and trained more than 300 local Mississippians; ensured compliance with federal and state regulations; and provided a means to track and monitor the program and prevent fraud, waste, and abuse. Reznick Group was directly involved in the distribution of more than \$2.5 billion under this program. The programs’ structure, personnel, and process were multi-focused, having oversight and responsibility for the seamless integration of HUD, FEMA, SBA, and state policy requirements.

- Performed quality assurance/quality control operational audits;
- Participated in detailed quality improvement projects, tested and analyzed data, classified results, and documented findings;
- Assisted in restructuring the Eligibility Department’s procedures to meet specific deadlines and goals set by management;
- Employed Microsoft Word, Excel, PowerPoint, and Visio to provide reports to management and peers;
- Provided customer service to grant applicants;
- Assisted lenders and applicants through the post-closing process, including resolving property title issues; and
- Provided data entry into a Microsoft Access database for grant processing records.



Angela Marie Zatlin

Director | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Zatlin, a Director with CohnReznick Government Services, has more than 20 years of experience managing complex disaster relief programs, including states’ recovery efforts resulting from Hurricanes Katrina, Rita, Ike, Harvey and COVID.

Ms. Zatlin is a closeout manager in charge of the project and account closeouts of 1,600+ applicants across 15 disaster declarations. In less than 4 years, she oversaw the closeout of more than 11,000 projects and 900 accounts.

During COVID, Ms. Zatlin was a project manager for a state Emergency Rental Assistance Program. In less than 9 months, she oversaw more than 130,000 application eligibility reviews and disbursed \$561M to tenants in need of relief.

Ms. Zatlin was also a project manager for a state Homeowner Assistance Fund. Over the span of two years, her team performed compliance reviews of over 19,000 eligibility determinations and monitored \$842M of assistance to homeowners.

Additionally, Ms. Zatlin is currently a project manager for the Office of the Governor of Texas, overseeing the monitoring of \$16B in Treasury-funded ARPA grants.

EXPERIENCE

Project Manager (March 2025 – Present) Clean Energy Fund of Texas

CohnReznick provided advisory services related to the Clean Energy Fund of Texas related to their Solar for All Program, the CHARGE Initiative. Working primarily with CEFTX, and in collaboration with their Program Partners, CohnReznick was a thought partner for all elements of a launching a new program; from developing an application, review and selection process, drafting program guidelines, written policies and procedures, to conducting financial reconciliations, and developing subrecipient trainings.

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 1, 15, and 16

Senior Grant Manager - Task Areas 2, 3, 4, 7, 8, 10, 12, and 13

Proposed Task Areas

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

Education

- B.S. Accounting, American University

Certifications

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



- Program Implementation and Federal Compliance Infrastructure: We developed and implemented program policies, procedures, and systems to ensure full adherence to 2 CFR 200, EPA Terms and Conditions, and Solar for All Terms and Conditions.
- Technology and Reporting Systems: We advised CEFTX on configuring systems for tracking budgets, milestones, and deliverables, including contingency planning for funding disruptions. In instances where the selected technology could not meet all of the needs of the program, CohnReznick advised on wraparound products that could accomplish the program goals.
- Subrecipient Support and Oversight: Our team structured the subrecipient application and review process to ensure proper governance. Further, we established and enhanced systems necessary for effective grant management, including financial tracking, reporting, and compliance monitoring.
- Stakeholder Coordination: CohnReznick worked in collaboration with CEFTX and its program partners to identify stakeholders, define disparate and coordinated scopes of work, and establish a unified framework for engagement, implementation, and accountability across all program activities.

Project Manager (October 2024 – Present)

State of Louisiana, Office of Community Development, Disaster Recovery – Economic Development & Infrastructure Programs

CohnReznick provides software evaluation and support services for the Economic Development and Infrastructure (ED&I) Program team for the Office of Community Development, Disaster Recovery Unit. The ED&I programs are funded by allocations from the Department of Housing and Urban Development's (HUD) Community Development Block Grant Disaster Recovery Program (CDBG-DR) with the objective of assisting the state in long-term recovery efforts. In her role as project manager, Ms. Zatlin oversees the following tasks :

- Process Review and Optimization - Provide general recommendations on program processes, organizational structure, and developing internal quality control processes.
 - Analyze gaps, evaluate implementation options, and coordinate with OCD stakeholders to finalize priority of implementation activities.
 - Identify and assist with program, process, and system changes that provide greater efficiency and effectiveness and optimizes use of personnel and other resources.
 - Coordinate with system developer, as requested by OCD, to track progress, resolve issues, and perform User Acceptance Testing.
 - Coordinate with OCD in the development or revision of SOPs, process flows, and templates.
 - Assist in the development of business operational requirements and business reporting requirements.
- Reporting and Analytics
 - Review available system data from vendor and align with desired state dashboards and reporting needs.
 - Coordinate with OCD to establish data dictionary.
 - Coordinate with OCD to perform cleanup and standardization of existing data.
 - Prepare and deliver scheduled reports to OCD, as requested.
 - Draft system operational requirements and system reporting requirements.
- Training
 - Review available training materials and modify to support changes in process and system design.
 - Coordinate with OCD to record trainings specifically developed for each user type, tailored by program, if needed.

**Project Manager (July 2022 - Present)****Office of the Governor of Texas**

CohnReznick is the sole vendor to the Office of the Governor of Texas, providing federal grant oversight and monitoring services for funding received by the State of Texas. CohnReznick provides these services for the state's entire portfolio of programs and projects funded by the Infrastructure Investment and Jobs Act (IIJA), the American Rescue Plan Act (ARPA), the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and the Consolidated Appropriations Act of 2021 (CAA). CohnReznick delivers complex grant administration activities, including: monitoring financial and programmatic compliance with state and federal requirements, providing technical assistance to subrecipients and beneficiaries, validating project-level expenditures, reviewing and processing applications for federal assistance, advising on systems development, and leveraging programmatic data to mitigate against fraud, waste, and abuse.

- Develop risk assessments and compliance monitoring plans;
- Monitor both the programmatic and financial aspects of awarded projects;
- Examine subrecipient and state agency support documentation for sub-grant/grant expenditures;
- Verify cost classification and delivery methods for each project;
- Identifying duplicate expenses across projects, subawards, or contracts;
- Ensure deadlines are met, applications or other documentation are complete and correct before submission to federal authorities;
- Monitor activities in accordance with the project guidelines, and payment requests are promptly and correctly processed;
- Conduct briefings and other outreach and training activities; and
- Complete application eligibility reviews in the system of record using the review tool within the system.

Project Manager (January 2022 – May 2024)**Texas Department of Housing and Community Affairs (TDHCA)**

CohnReznick assisted TDHCA with a variety of compliance activities related to the Homeowner Assistance Fund program, serving as the QA/QC vendor providing monitoring and oversight in support of the program administration team. Our team conducts case reviews, reviews policy and procedures for compliance with Treasury requirements, monitors for fraud risk flags and analyzes program data to identify discrepancies that threaten the integrity of the program.

- Completed 11,261 approved and 10,177 denied quality control reviews.
- Implemented Optical Character Recognition (OCR) for anti-fraud detection to identify potentially fraudulent cases. OCR was performed on more than 4 million pages and 1.4 million PDF documents.
- Validated implementation vendor invoicing to confirm compliance with their contract.
- Provided ad-hoc targeted reporting assistance to TDHCA Fraud/QA/QC lead.

Project Manager (March 2021 – March 2022)**Texas Department of Housing and Community Affairs (TDHCA)**

CohnReznick was contracted with TDHCA to provide eligibility review services associated with its Emergency Rental Assistance Program. TDHCA received an allocation under ERA1 of \$1.9B.

- Coordinate project ramp-up to 450 staff members across multiple firms.
- Establish an efficient procedure for performing Application Eligibility Reviews that minimizes the review time, commits to quality control, and consistently follows all program guidelines.



- Oversee the performance of Application Eligibility Reviews and associated appeals on assigned of Texas Rent Relief Program application files.
- Provide technical assistance and expertise in relation to Application Eligibility Reviews and associated processes and related subject matter areas to TDHCA staff as needed.

Project Manager (June 2013 – Present)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the TDEM for federal grant administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Perform complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor the closeout of Public Assistance projects within the State of Texas.
- Ensure deadlines are met, applications or other documentation are complete and correct before submission to FEMA, monitoring activities are conducted in accordance with the program guidelines, and final payment requests are promptly and correctly processed.
- Develop and oversee a closeout pipeline of 2,000 – 3,500 project worksheets; review and approve financial summary reports, project and account closeout letters to FEMA, and final payment to applicants post-closeout.
- Work hand-in-hand with FEMA regional staff to resolve closeout issues as they occur, manage workflow transitions between FEMA and the State, and report on progress to all stakeholders.

Systems Requirements Business Analyst; Grant Determination and Disbursement Manager; Audit Manager (January 2008 – March 2012)

Texas Department of Housing and Community Affairs (TDHCA)

CohnReznick was contracted with TDHCA to provide program management and oversight for multiple TDHCA Disaster Recovery programs following Hurricanes Katrina, Wilma, and Rita.

- Collaborated with the application development vendor to develop and modify a system that provided full end-to-end grant processing functionality for TDHCA, which included numerous data interfaces, eligibility, benefit, calculation, quality, and fraud checks.
- Performed, reviewed, and/or oversaw the award amount determination of more than 2,800 applicants, including duplication of benefit and eligibility reviews.
- Performed or reviewed the calculation of nearly 7,000 individual disbursements totaling \$500 million for more than 15 contractors, including determining when disbursements were due, how many disbursements were due on an application and in what percentages, and manually creating a file for upload into the accounting system.
- Worked closely with state and federal auditors on contract compliance, general oversight and monitoring, and IT compliance.
- Implemented audit recommendations and improvements, as requested.



Systems Analyst; Training and Outreach Manager; Verification Lead for Housing Programs (February 2006 – January 2008)

Mississippi Development Authority (MDA)

CohnReznick was contracted by the MDA to provide program management and oversight over multiple MDA disaster recovery programs following Hurricane Katrina.

- Worked with the application development vendor daily to develop a system that provided full end-to-end grant processing functionality, which included numerous logic, calculation, and fraud checks; eligibility verification; and data verification with 100+ third-party sources.
- Developed training materials for every phase of the grant administration life cycle and acquired extensive knowledge of the CDBG administration and full life cycle processes for intake, verification, approval, closing, and disbursement.
- Trained service center staff in high-level grant program processes and provided detailed training in the use of grant administration application.
- Coordinated help desk functions, as well as provided on-the-ground support in each service center to supervisors, technical staff, and application processing staff as the period for accepting applications closed.
- Developed manual and automated processes to ensure applicants met the stated MDA policies for receiving CDBG funds, which included determining applicant eligibility.



Juliann Bertone

Director of Long-Term Recovery | Metric Consulting

BIOGRAPHY

Ms. Bertone has over 14 years of expertise in financial and grant administration for federal, state, and local programs, including the HUD CDBG-DR Program and the FEMA PA Program. She has successfully managed the entire life cycle of grants, from application and eligibility determination to quarterly reporting and closeout. As a Program Manager, she has overseen grants such as a \$1.6 million HOME-ARP allocation for the City of Nashua, New Hampshire, and provided FEMA PA advisory services for KEYS Energy Services. Her role often involves ensuring compliance, coordinating with various agencies, conducting needs assessments, financial tracking, and managing contractor and subcontractor qualifications.

EXPERIENCE

Project Manager (February 2025 – Present)
FEMA PA Consulting Services, Hendersonville Housing Authority, Hendersonville, North Carolina

Provides FEMA Public Assistance (PA) consulting services to the housing authority, ensuring compliance with federal regulations and maximizing grant funding for disaster recovery. Assists with damage assessments, eligibility determinations, project formulation, and financial tracking. Supports the development of hazard mitigation strategies and facilitated reimbursement processes to expedite recovery efforts.

Project Manager (01/2025 – Present)
All-Hazard Mitigation Plan Development, City of St. George, Louisiana

Assists the city in developing its FEMA-required Hazard Mitigation Plan, ensuring compliance with federal and state regulations. Including conducting risk assessments, identifying mitigation strategies, and facilitating stakeholder engagement. Prepares documentation to support the approval processes, to enhance community resilience and to secure future mitigation funding.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 1

Senior Grant Manager – Task Areas 8, 12, and 15

Proposed Task Areas

- 1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
- 8. Program Performance Monitoring and Evaluation
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- M.A., Global Leadership & Sustainable Development, Hawaii Pacific University
- B.S., Integrated Marketing Communications, Ithaca College

Certifications

- Graduate Regional Institute for Health and Environmental Leadership
- Colorado Department of Public Health and Environment: Project Management Essentials
- Colorado Department of Public Health and Environment: Behavioral Health for Spokespersons Training
- FEMA: Introduction to ICS for Operational First Responders
- FEMA: External Affairs

**Program Manager (05/2024 – Present)****HOME-ARP Consulting Services, City of Nashua, New Hampshire**

Ms. Bertone 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.

Program Manager (01/2024 – 07/2024)**CDBG-DR Uniform Relocation Assistance Services, Texas General Land Office, Houston, Texas**

The City of Houston acquired four properties that were classified as low- to moderate-income rental units, which directly affected over 700 tenants who had to be properly processed under the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA). To meet URA requirements, our team provided comprehensive support in several key areas.

First, we assisted with locator services to track down and contact tenants who had already relocated from the affected properties. This was crucial in ensuring that all displaced individuals were properly identified and processed for eligibility under the URA. Once the tenants were located, we helped eligible tenants gather the necessary documentation to substantiate their claims for relocation benefits, including assistance with URA claim forms for moving costs and rental assistance. This process involved working closely with each tenant to ensure they were informed of their rights and that all required paperwork was completed correctly.

Senior Program Manager (07/2023 – 09/2023)**Reconnecting Communities and Neighborhoods**

Grant Preparation Services, City of Chipley, Florida: Metric worked with the City of Chipley to create and apply for the Department of Transportation's (DOT's) Reconnecting Communities and Neighborhoods (RCN) Grant. Titled "Uniting Communities of Chipley through Equitable Access and Mobility," the proposed project aimed to advance community-centered transportation by addressing the dividing facilities that prevent equitable access to safe, reliable transportation infrastructure. Metric worked closely with the City to assess their needs and provided them with a complete application to submit to DOT.

Senior Program Manager (07/2023 – 09/2023)**Neighborhood Access and Equity: Grant Preparation Services, City of Morgan City, Louisiana**

Metric was selected by the City to prepare and apply for the DOT's Neighborhood Access and Equity (NAE) Grant program. Metric provided the City with cost estimating, needs assessments, and application creation from start to submittal. The project, titled "Connecting Neighborhoods and Communities to Opportunity through Equitable Infrastructure," was designed to enhance community-oriented transportation by tackling the barriers that hinder fair access to secure, dependable transportation infrastructure.

Program Manager (06/2023 – 05/2024)**Emergency Management Consulting Services, KEYS Energy Services, Florida**

Metric is providing FEMA PA advisory services, hazard mitigation expertise, and financial and grant management support. Metric assisted KEYS in developing their concept paper for submission to the Office of the Department of Energy (DOE) for their Grid Resilience and Innovation Partnership (GRIP) grant program. After a favorable review, DOE encouraged KEYS to submit a grant application for award consideration. Currently, Metric is providing technical assistance in the grant



application development and submittal for the acquisition and implementation of software and equipment, including upgraded electric meters and equipment monitors to support AMI and the addition of collectors to acquire meter data through the GRIP opportunity. In addition, Metric is creating the community benefits plan to include community and labor engagements, investing in job quality and workforce continuity, advancing diversity, equity, inclusion, and accessibility, and contributing to the Justice40 Initiative goal to ensure that 40% of overall benefits of federal investments flow to disadvantaged communities. The grant request is for an estimated budget of \$20 million.

Program Manager (06/2023 – Present)**Grant Management Services, City of Pinellas Park, Florida**

Metric was selected by the City of Pinellas Park to assist with grant management and reporting for federal, state, and any other applicable entities. This includes general FEMA PA, and other agencies grant management advice, assistance, and reporting. Metric also manages the lifecycle of grants, including compiling, preparing, and submitting commencement and pre-reimbursement documents, preparing and submitting status reports to grant agencies, and the compilation, preparation, and submission of project closeout documentation.

Project Manager (11/2022 – 04/2023)**HOME Investment Partnerships Program – American Rescue Plan Consulting Services, Franklin County, Ohio**

Metric worked with Franklin County to develop a HOME-ARP Allocation Plan, ensuring the creation of a plan that best served the Franklin County community. Metric's tasks included developing an Allocation Plan schedule, conducting the required agency and service provider consultation process, developing the Allocation Plan in compliance with all HOME-ARP regulations, conducting required public participation, and assisting the County in the submission of the final Allocation Plan to HUD.

Project Manager (05/2022 – 04/2023)**HOME Investment Partnerships Program – American Rescue Plan Consultation Services, City of Columbus, Ohio**

Metric was selected to provide grant consultation services for the City of Columbus' \$16 million HOME-ARP allocation. The allocated funds are intended to reduce homelessness and increase housing stability across the City. Metric created a detailed project work plan to ensure the creation of a compliant and comprehensive funding Allocation Plan. Metric also designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. Finally, Metric assisted the City with the consultation services that are required for a successful Allocation Plan.

Project Manager (04/2022 – 07/2023)**CDBG-DR Funded Grant Application Development, Terrebonne Parish Consolidated Government, Louisiana**

In partnership with another firm, Metric was selected by the Terrebonne Parish Consolidated Government for grant management and administrative services for HUD, FEMA, and other federally funded programs. Metric supported the Parish by 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. As part of this work, Ms. Bertone oversaw grant application development for the CDBG-DR funded grant applications for the Resilient Communities Infrastructure and Hometown Revitalization programs.

**Associate Program Manager (09/2021 – 02/2023)****COVID-19 Response and Assistance, Unified Government of Wyandotte County and Kansas City, Kansas**

In response to COVID-19, ARPA funding was utilized to provide urgent and targeted funding for workers and families. The Unified Government (UG) sought assistance to maximize its ARPA funding while identifying additional grants to provide relief to citizens. To expedite their efforts, the UG requested grant discovery and grant writing services to maximize their allocated funds. Metric's goal was to identify federal funding opportunities through ARPA and to collaborate with state agencies to ensure the UG received the maximum amount of funding possible. Metric provided the UG with comprehensive grant management and cost recovery services, including strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance.

Associate Program Manager (05/2021 – 07/2022)**Needs Assessment for ARPA Funding, Saline County, Kansas**

Metric's team was engaged by Saline County to support the County's ability to ensure compliance with federal regulations while maximizing the usage of ARPA funding in the local community. Metric's team conducted a Needs Assessment for one of Saline County's ARPA funded programs. The goal of the Needs Assessment was to obtain a full picture of the unmet needs that ARPA funding could address in the interconnected areas of criminal justice, mental health, and public safety.

Project Manager (09/2020 – 09/2023)**Disaster Related Recovery Services, Pasco County, Florida**

Metric was hired by Pasco County to provide disaster recovery and hazard mitigation consulting services.

Metric served as a grant administration and HMGP recovery consultant and was responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, organizing data and providing reporting, effective quality-management protocols, reviewing and improving procedures, and providing reimbursements and financial management.

- **Hurricane Ian (2022):** Metric compiled and reviewed over \$2 million in eligible FEMA PA project costs, including force account equipment, materials, and labor. Metric also analyzed field documentation and various Scopes of Work.
- **COVID-19 (2020):** The County issued COVID-19 Recovery Category B: Emergency Protective Measures, which involved recovery services for federal funding programs as they related to the county's recovery measures. Metric assisted with FEMA PA Category B: Emergency Protective Measures, Health and Human Services reimbursements and grants, duplication of benefits, project closeout, appeals, CDBG-CV funds, date of loss, unemployment issues, and CARES Act guidance and grant management.

Associate Program Manager (09/2020 – 06/2021)**COVID-19 SPARK Grant Management Support, Finney County, Kansas**

Metric was retained by Finney County to support grant management and writing for COVID-19 related reimbursements aimed at increasing resiliency by improving the systems that support housing, government access, and public infrastructure. Metric provides Finney County with comprehensive grant management and cost recovery services that cover strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance and training. The strategic planning aspect of the contract covers how to properly utilize different sources of funding, including the State's SPARK grant. The FEMA PA cost recovery portion covers FEMA cost recovery and project application training for Finney County staff. Overall, Metric is managing a grant program that includes \$10.9 million in funding. Metric wrote a grant funding request for \$1.8 million in new state grants and launched four separate grant programs. To date, Metric has



assisted over 100 households, 29 businesses, and 20 community organizations.

Associate Program Manager (09/2020 – 06/2021)

COVID-19 Recovery and Response Assistance, Seward County, Kansas

Metric was retained to support grant management and writing for COVID-19-related reimbursements. As the County's technical consultant for FEMA PA cost recovery, Metric guided the County through FEMA requirements and helped ensure the County received the maximum eligible recovery of costs. Metric provided community outreach, cost recovery, grant management, program implementation support, and technical assistance and training. Metric implemented several programs that covered rent, mortgage, and utilities assistance for households, including those with low-to-moderate incomes (LMIs), recovery grants for small businesses and microenterprises, reimbursement of COVID-19 related expenses for government entities and non-profits, and grants for community-supported COVID-19 response and recovery initiatives. Overall, Metric managed a grant program of approximately \$7 million in funding and implemented four separate programs that served 467 households, 65 businesses, and 39 community organizations.

Associate Program Manager (09/2020 – 06/2021)

SPARK Grant Management Support, Neosho County, Kansas

Metric provided the County with comprehensive grant and program management, and cost recovery. The work included a community needs assessment, strategic planning, program design and implementation, training, case management, and project closeout. Metric engaged with the community to identify and apply for additional funds and to implement strategies for a holistic recovery, which led to the County securing nearly \$1 million in FEMA PA funding to supplement COVID-19 recovery efforts funded by the U.S. Treasury's CRF grant.

Metric collaborated with local non-profit groups to ensure that the County met the needs of their residents, small businesses, and community organizations, and Metric's approach allowed the County's CRF dollars to be stretched, as the County leveraged other grant programs for items they could fund.

PREVIOUS EXPERIENCE

Program Manager (03/2019 – 08/2020)

CDBG-DR Administration, Puerto Rico Department of Housing, San Juan, Puerto Rico

Ms. Bertone served as a Portfolio Manager for Puerto Rico's suite of CDBG-DR programs, targeted at addressing the needs of its most vulnerable people, including a Social Interest Housing Program and Housing Counseling Program. She managed a portfolio of over \$50M to execute the successful implementation of these programs. She provided materials and support throughout multiple HUD monitoring and oversight visits, led comprehensive program design, proactively implemented change management to update documents when contracts, agreements, policy, federal regulation, internal procedure, budget, schedule constraints, scope, and other factors warranted change, and performed subrecipient management and oversight for six HUD-certified Housing Counseling Agencies. She led marketing and outreach campaigns to reach non-profit organizations and encouraged them to apply for funding from the island's Social Interest Housing Program, resulting in 43 non-profits submitting applications for funding. She also established and enforced processes to support delivery of program goals, and engrained regular reporting in housing programs to ensure that stakeholders remained informed and empowered to make decisions.



Communications & Policy Analyst (11/2014 – 03/2019)

Colorado Department of Public Health and Environment, Denver, Colorado

Ms. Bertone led all communications, outreach, and mass messaging for emergency and non-emergency health situations. As part of her role, she monitored grant outcomes and deliverables for 64 Colorado counties and two federally recognized tribes in Colorado, which involved providing technical assistance and implementation guidance. She also served as a Project Planner for Colorado's implementation of Assistant Secretary for Preparedness and Response and Centers for Disease Control and Prevention's Public Health Emergency Preparedness (PHEP) Cooperative Agreement and Hospital Preparedness Program (HPP) funding. This included the execution agreement for the five-year project period to improve the readiness of state, local, and territorial public health and health care systems. Further, she trained community stakeholders on statewide emergency preparedness and response policy, including the Governor's Expert Emergency Epidemic Response Committee, the Colorado Board of Health and the Emergency Preparedness and Response Public Health Medical Advisory Committee.

Grants & Communications Associate (02/2014 – 10/2014)

Isles Inc., Trenton, New Jersey

Ms. Bertone prepared and submitted grant proposals while ensuring high quality standards, meeting all deadlines, collaborating with departmental managing directors, and achieving over \$500K in funding towards Isles' community resilience and sustainability. She ensured compliance with funding requirements, including reporting and analysis of program accomplishments. She also planned, organized, and executed communications efforts including community events, newsletters, social media, press kits, crowdfunding, and stakeholder networking events.



David Solomon

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

David Solomon is a Senior Manager at CohnReznick with 10 years of experience in project management relating to business systems implementation, auditing, and reporting. Having previously worked in the public sector for the Florida Division of Emergency Management (FDEM) and the Florida Department of Financial Services in the Bureau of Auditing (DFS), he has expertise auditing state and federally procured contracts and payments under the Stafford Act and Single Audit Acts, and leading business systems process mapping and process improvement.

Mr. Solomon's specific experience includes:

- Assisting in the State of Florida's implementation of CARES and ARPA, leveraging technology to expedite the processing of sub recipient agreements.
- Leading applicant intake for FEMA Public Assistance funding, including but not limited to DR4486, COVID-19, and Hurricanes Michael through Isais.
- Acted as a liaison and SME for DFS to the FloridaPALM project, the Enterprise Resource Planning platform to replace Florida's current accounting system, FLAIR, and served as a panelist for the Florida Grant Consortium.
- Deployed to support vaccination sites across the State of Florida as a liaison for FDEM and served as the project manager for FDEM's transition to a new, Salesforce-based grant management platform, FDEMGraints.

EXPERIENCE

Project Manager (2022 – Present) FloridaCommerce

CohnReznick performs compliance monitoring over \$1.3 billion in CDBG-DR funding for Hurricane Michael and CDBG-MIT. Programs included in this funding include housing, workforce development, HMGP match, hometown revitalization, planning, general infrastructure, and critical facility hardening.

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 2 and 4

Senior Grant Manager – Task Areas 1, 3, 5, 8, 9, 10, 12, 15, and 16

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
9. Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management

Education

- M.A., History, University of Vermont
- B.A., History, Florida State University

Certifications

- Florida Certified Contract Manager (FCCM)



Our team performs onsite monitoring over the state's 120+ subrecipients that are utilizing this funding to ensure compliance with programmatic guidance and cross cutting statutes, such as David Bacon and URA.

- Provide overall management and oversight over field staff, compliance staff, and the project management office;
- Attended FLCommerce meetings to provide updates on progress;
- Interface with subrecipients on high-level issues;
- Create and present on reporting dashboards; and
- Provide policy and process advice to FLCommerce.

Project Manager (August 2021 – March 2022)

State of New Jersey - Department of the Treasury Office of Management and Budget (OMB), Department of Health, Department of Corrections, Department Community Affairs

CohnReznick partnered with the New Jersey Office of Management and Budget (OMB) to conduct integrity monitoring for several New Jersey State agencies that received allocations of CARES (CRF) and Consolidated Appropriation Act funds, the total of which exceeded \$1.3 billion.

- Performed risk assessments, sample testing, facilitated meetings with NJ OMB and relevant state agencies, and assisted with the drafting and submission of quarterly and capstone monitoring reports on an expedited timeline.
- Acted as a point of contact for OMB questions and concerns, provided regular updates on the status of the project to all stakeholders.

Systems Admin & Reporting Manager (October 2018 – August 2021)

Florida Division of Emergency Management

Led and supervised the maintenance of several grant management portals, including FloridaPA.org, FEMA Grants Portal, and FEMA EMMIE. Supervised the Request for Public Assistance process, the application cycle for applicants seeking reimbursement for eligible expenses, responsible for extensive customer service and management of thousands of applications across multiple federally declared disasters.

- Deploying to support counties pre and post hurricane landfall, as well as in response to the COVID-19 pandemic
- Serving as project manager for the migration to a new grants management platform utilizing Salesforce, leading user testing and FEMA integration, and serving as project manager for the Division's OpenGov implementation
- Developed access controls and security policies for the public assistance system of record, FloridaPA
- Extensive experience working with FEMA and applicant stakeholders, knowledge of Federal and State statutes, laws, and regulations in regards to grant awards.



Sarona Saadeh

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Sarona Saadeh is a Senior Manager with CohnReznick's Government Advisory Practice with over 12 years of experience providing financial analysis and disaster recovery consulting services to housing developers and government entity clients. Ms. Saadeh has experience providing financial advisory and underwriting services for housing projects funded with the Low-Income Housing Tax Credit, Tax Exempt Bonds, CDBG-DR, and other Federal programs. Ms. Saadeh also provides grant management and disaster recovery consulting to State entities utilizing CDBG-DR and FEMA Public Assistance Grant funds and has been involved in assisting State entities run large-scale housing programs.

EXPERIENCE

Subject Matter Expert; Program Manager (September 2022 - present) **Delaware State Housing Agency (DSHA)**

CohnReznick is engaged to provide Project Management, Accounting & Compliance Reporting for DSHA's State and Local Fiscal Recovery Funds (SLFRF) Program, funded under the American Rescue Plan Act (ARPA). This \$60 million program incorporates several sub-programs to address the critical affordable housing needs throughout the State of Delaware. The Catalyst Fund is designed to redevelop blighted areas unable to be redeveloped by traditional market forces. The Accelerator and Preservation Fund are separate approaches to stabilize and increase the number of affordable housing units throughout the state. Finally, the Market Pressure Relief program seeks to address the rapidly evolving market and economic conditions to ensure that ongoing affordable housing LIHTC developments continue their sustainability.

- Program Design Support;
- Program Administration Plan Development;
- Program Policy, Procedure, and Application Development;
- System of Record and Data Architecture Development;
- Project Application Eligibility Review; and
- Program Compliance and Reporting.

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 2 and 4

Senior Grant Manager – Task Areas 1, 3, 5, 6, 8, 10, 12, 15, 16, 17

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
6. Action Plan Development and Amendments
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- M.B.A., Texas State University
- B.B.A., Accounting, Texas State University



Subject Matter Expert; Program Manager (January 2021- December 2021) **Connecticut Department of Housing (CTDOH)**

CohnReznick contracted with CTDOH to provide support for its Emergency Rental Assistance Program, UniteCT. Our duties included analysis of statutory language from the Consolidation Appropriations Act 2021. We worked with the CTDOH and the Governor's Office of Policy Management (OPM) to develop the State's policies and program eligibility requirements. This \$235 million program was designed to provide rental and utility payment assistance to qualified CT households financially impacted by the COVID-19 pandemic. The intention of UniteCT to help stabilize CT's rental housing market while serving households at or below 80% of HUD's Area Median Income required both effective policies and procedures and quick action to make eligibility determinations. Our firm managed over 200 staff simultaneously to perform in-depth reviews of applicant residency and income information and eligibility, as well as landlord ownership information and payment amounts. CohnReznick had the opportunity to assist the State of Connecticut in the disbursement of over \$195 million to more than 27.5k households in a period of less than 8 months.

- Reviewed Treasury guidelines and regulations to develop program policies for UniteCT
- Collaborated with Yardi Systems on the RentRelief portal development and customization for UniteCT;
- Developed program procedures, processes, tools, and resources for the application review team;
- Developed outward-facing correspondence templates for application review team;

Trained and onboarded over 250 internal and external staff on performing application reviews;

Developed processes and trained case management professionals for high volume application intake;

- Supported the State's staff in implementing various new guidance, functions, processes, and initiatives;
- Supported the State and the application review team by addressing complex or problematic applications or program participants and performing conflict resolution.

Subject Matter Expert; Grant Manager (July 2019 – July 2020) **Texas General Land Office (GLO)**

CohnReznick is currently engaged with the GLO to provide grant management services to facilitate CDBG-DR administered by the GLO and their Subrecipients under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$5 billion for the Hurricane Harvey CDBG-DR recovery activities. Ms. Saadeh is specifically responsible for the oversight of four community development programs totaling nearly \$700 million in CDBG-DR funding and provides technical assistance on cross-cutting federal regulation, CDBG-DR policy, industry best practice, and program specific evaluation to develop solutions to meet federal and state requirements.

- Review Action Plan amendments to ensure consistency and accuracy with desired outcome;
- Review subrecipient program guidelines to provide feedback and revisions that align with federal/state policy;
- Develop program criteria including application and payment request requirements;
- Develop application/payment review processes: SOPs, checklists, organizational structures;
- Develop project trackers, determination letter templates, progress & status reports;
- Perform reviews of documentation to determine eligibility for participation and for reimbursement;
- Act as a liaison between the subrecipient and the State to ensure clear and up-to-date flow of information;
- Collaboration with State grant management system designers to update and improve functionality for optimal project record retention and reporting.



Manager (October 2018 - Present) **Texas General Land Office (GLO)**

CohnReznick is currently engaged with the GLO to provide application underwriting services to facilitate CDBG-DR housing activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$450 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

- Develop underwriting tools, reporting templates, and workflow processes;
- Assess applicant's ability to construct and operate multi-family housing utilizing CDBG-DR funds;
- Analyze the financial feasibility of proposed developments;
- Underwrite the allowability and cost reasonableness of all hard construction costs, associated soft costs, and development fees;
- Analyze gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment; and
- Provide guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.

Grant Coordinator (October 2017 – December 2019) **Texas Division of Emergency Management (TDEM)**

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Establish and maintain relationships with subrecipients around the State;
- Provide technical and programmatic assistance regarding the Stafford Act, FEMA Public Assistance Program, and relevant updates in policies and procedures;
- Ensure deadlines are met, applications and documentation is complete and accurate before submission to federal authorities;
- Review project worksheets scope of work to ensure completeness and accuracy;
- Provide assistance on project reimbursement documentation to ensure compliance with applicable regulations;
- Perform site inspections and document progress and/or completion of projects, causes for delay, and deviations from scope of work;
- Process subrecipient requests regarding scope changes, time extensions, and special circumstances; and
- Monitor compliance through regular technical assistance, quarterly status reviews, and ongoing monitoring of reimbursement requests.
- Closely involved with the Texas General Land Office PREPS Program, serving as a liaison between the State, FEMA, and the GLO by assisting with program compliance, grant management and tracking, and assisting with special issues outside the traditional realm of FEMA Public Assistance.

Development Finance Consultant (2014 - 2018) **Houston Housing Authority (HHA)**

CohnReznick was engaged with HHA in the areas of taxation, audit, and real estate consulting relating to the HHA's tax credit and public housing affordable properties.

- Review tax returns and audited financial statements of affordable rental properties;



- Provide financial projections and cash exposure analysis on existing projects;
- Review pre-development financial budgets for new project proposals and provide technical assistance in project financial structuring and forecasting;
- Perform various agreed-upon procedures related to tax and programmatic compliance requirements such as tax-exempt bond arbitrage analysis, and 95-5, 50%, and 10% cost tests;
- Review and assist in the preparation of 8609 applications; and
- Provide portfolio valuation, capital account analyses, and debt analysis on new and existing projects.



Mary Michael Staples

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Mary Michael Staples, CIA, PMP, a Senior Manager with CohnReznick Government Services, has 17 years of experience in grant and project management and internal audit services in the public and private sectors. Ms. Staples is currently the Program Manager for CohnReznick's monitoring engagement supporting Louisiana's Office of Community Development, Disaster Recovery Unit for a number of federally funded programs. Programs include the state's Restore 2016 Louisiana Homeowner Assistance Program (\$1.3B HUD CDBG), Restore 2020 Louisiana Homeowner Assistance Program (\$2.3B HUD CDBG), and Restore24 Homeowner Assistance Program (\$118M HUD CDBG).

Ms. Staples aided the State of Louisiana's Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP) in developing Standard Operating Procedures (SOPs) and tools and templates for their Hazard Mitigation Grant Program (HMGP). She also assisted the GOHSEP in the implementation of the Louisiana Hazard Mitigation online grants management system. Ms. Staples provided project management services to support CohnReznick's financial services engagement with the U.S. Department of Energy and integrity monitoring services to the State of New Jersey's Department of Community Affairs (DCA), Sandy Recovery Division (SRD).

Proposed Labor Category

Project Lead (**Key Personnel**) – Task Area 3

Senior Grant Manager – Task Areas 1, 2, 4, 5, 8, 10, 12, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management

Education

- B.S., Finance, Louisiana State University

Certifications

- Certified Internal Auditor (CIA)
- Certified Project Management Professional (PMP)



EXPERIENCE

Program Manager (July 2020 – Present)

State of Louisiana Office of Community Development (OCD) Disaster Recovery Unit (DRU) — Quality Control/Quality Assurance (QA/QC) – Grant Compliance Monitoring

CohnReznick is responsible for assisting in the continued development of policies and procedures that ensure that the Program is operated in an accurate, efficient, effective and accountable manner; test and report that the Program Contractor operates the Program in accordance with the policies and procedures developed for the RESTORE Program, as well as with applicable published Action Plans, including the testing of RESTORE Program processes and sampling applicant files both at the eligibility and construction stages; develop and monitor controls to eliminate duplication of benefits from insurance companies, FEMA, and other sources of funds; monitor and test procedures to detect fraud, waste and abuse of Program funds; develop and execute monitoring procedures to test compliance with federal and State regulations and compliance with the State's contractual agreements with HUD; assist in developing and managing internal quality control processes to ensure consistency among a large number of construction contractors; monitor and evaluate for the compliance the Scope of Work (SOW) and damage estimates as produced through the Xactimate software; and design and produce reports as required by the RESTORE Program Contractor, OCD-DRU and other stakeholders upon request and approval by OCD-DRU.

- Provide oversight, support, and coordination of the QA/QC activities for Program Monitoring, Information Technology Software System Reporting and Monitoring, and Construction Monitoring in a manner to maximize efficiency, minimize risks, and protect the interests of the state;
- Coordinate with OCD management to set priorities, discuss issues, and provide recommendations for issue resolution;
- Monitor and track progress of QA/QC team tasks;
- Primary point of contact for coordination and communication with contractors being monitored; and
- Provides status of monitoring activities to OCD management on a routine basis, escalating problems encountered.

Manager (April 2017 – June 2020)

- Support Program Manager and Project Managers in achieving project goals and completing project deliverables;
- Document internal team procedures, develop checklists, tools and templates for teams to facilitate consistent and efficient operations;
- Gather information required for HUD, the state, and other parties related to reporting, activities performed, etc.;
- Participate in User Acceptance Testing and provide training to team members related to system updates; and
- Participate in meetings with client and Program contractor.

Manager (June 2015 – July 2017)

U.S. Department of Energy

CohnReznick is currently engaged under a Blanket Purchase Agreement with the U.S. Department of Energy to provide various audit services to its field offices.

- Developed work plans and budgets for requested audits and
- Coordinated review and invoiced activities of time and expenses for CohnReznick employees and subcontractors participating on audits.



Business Analyst (July 2013 – June 2015)

State of New Jersey Department of Community Affairs (DCA), Sandy Recovery Division (SRD)

CohnReznick served as the Integrity Oversight Monitor of the Community Development Block Grant-Disaster Recovery (CDBG-DR) program funds for which DCA was responsible for administering. The purpose of the Integrity Oversight Monitor was to serve as the DCA's primary contractor and centralized point of contact in the oversight of its CDBG-DR programs described in the DCA's Action Plan.

The team worked with DCA-SRD to develop, monitor and ensure an effective system of internal control for DCA's CDBG-DR projects and activities with respect to the following: compliance with federal and state laws, regulations, policies and contracts; operational efficiency and effectiveness; financial management and related controls; prevention and detection of fraud, waste, and abuse; and reporting of performance outcomes.

- Performed the compilation and development of weekly status report updates and Monthly Activity Reports detailing activities performed by the CohnReznick team; and
- Conducted program integrity monitoring activities, including reviewing contractor invoices for completeness, accuracy, and reasonableness; and assisting in preparing Integrity Monitoring Reports documenting review results.

Business Analyst (October 2012 – July 2014)

The Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP)

CohnReznick assisted the Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP) in identifying, recommending, and implementing process improvements by developing standard operating procedures (SOPs), job aids, guidelines, process flows and templates in accordance with FEMA Hazard Mitigation requirements and guidance, for areas specific to grant programs administered by the Hazard Mitigation Section. Areas included: grant file administration; payment request processing; site inspections; quarterly reporting; cost sharing, matching, and in-kind contributions; property management; procurement and contracting requirements; and closeout process.

The team also assisted the GOHSEP by identifying, recommending, and developing process improvement tools for Post Award Administration, in accordance with the Federal Emergency Management Agency Hazard Mitigation requirements and guidance.

The team assisted the GOHSEP in implementing the Louisiana Hazard Mitigation online grants management system. Responsibilities included documenting business requirements, developing a data cleanup and backfill approach, coordinating user acceptance testing, and other required implementation activities.

Ms. Staples was responsible for the following:

- Reviewed internal procedures currently in place for administering Post Award Administration grants and coordinate with the HMGP staff to document and evaluate current processes for each functional area;
- Provided guidance and recommendations to mitigate findings as a result of the FEMA Region 6 monitoring visits;
- Created guidelines, job aids, standard operating procedures and process flows for the following areas: Grant File Administration; Payment Request Processing; Site Inspections; Quarterly Reporting; Procurement and Contracting; Closeout; Cost Share, Matching and In-Kind Contributions; and Property Management;
- Reviewed the State of Louisiana Hazard Mitigation Grant Program Administrative Plan Guidelines and Procedures and recommended revisions based on current processes and standard operating procedures;



- Created and enhanced Post Award Templates for use by GOHSEP personnel, to include the following documents: Payment Tracker, Payment Checklist, Closeout Tracker, Closeout Project Checklist, Quarterly Report Review Tool, and Quarterly Report Tracker;
- Developed and implemented internal GOHSEP Application Appeals guidelines, process flows and templates;
- Documented business requirements for modules to be included in the Hazard Mitigation online grants management system (LAHM);
- Developed and conducted training programs for LAHM users; and
- Developed approach and managed activities for data cleanup and backfill activities to populate the system with historical data.

Business Analyst (September 2012 – July 2014)

State of Louisiana Office of Community Development (OCD) Disaster Recovery Unit (DRU)

CohnReznick developed and implemented compliance and monitoring plans for more than \$13 billion of Community Development Block Grant (CDBG)-funded programs including the Road Home long-term monitoring plans and contractor compliance and monitoring plans, monitoring plans for the Gustav/Ike Parish Implemented Program, and 13 of the state's Katrina/Rita CDBG Disaster Recovery Programs.

- Assisted in the development and modification of work products for projects such as performance monitoring, compliance and monitoring plans and checklists, risk assessments, file management reviews, training materials, staffing analysis, process improvement analysis and recommendations, and policies and procedures;
- Developed requirements for compliance tracking and reporting systems;
- Facilitated work sessions and training workshops; and
- Assisted in making updates to the OCD/DRU Disaster Recovery CDBG Grantee Administrative Manual.



Omar Ahmad

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Mr. Ahmad is a consultant with CohnReznick Government and Public Sector Advisory and has six years of experience in public audit, program compliance, performance monitoring, system analysis and implementation, process improvement, fraud risk management, quality management, and audit and consulting services to state and federal government clients, public audit, supporting multiple Federal agencies in auditing, compliance and consulting engagements.

Expertise in audit and compliance, quality control and assurance, client communication, system implementation, process improvement, compliance reviews, and policy and procedure development and documentation.

Experience providing support to states with federally-funded disaster recovery and state-funded programs, with a focus on Community Development Block Grant (CDBG) programs and FEMA funds, including the client Louisiana Office of Community Development/Disaster Recovery Unit (OCD/DRU) in the wake of the Great Floods of 2016 & 2020 and Texas Department of Housing and Community Affairs which provided housing rental relief affected by COVID-19. He has also worked on the Texas Water Development Board to analyze the program's current systematic approach and evaluating current processes to provide process improvement methodologies.

EXPERIENCE

Staff Manager (September 2017 - Present)

Restore Louisiana 2016 & 2020

Restore Louisiana was initially established to assist homeowners impacted by the March and August 2016 Floods and has now expanded to include homeowners impacted by Hurricanes Laura, Delta, Ida and the May 2021 Severe Storm. Restore Louisiana is dedicated to helping homeowners recover from federally declared disasters. The program is administered by the Louisiana Office of Community Development (OCD) and funded by the U.S. Department of Housing and Urban Development (HUD) through federal appropriations of Community Development Block Grant-Disaster

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 3

Proposed Task Areas

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

Education

- Graduate Certificate, Forensic Accounting, George Mason University
- B.S., Accounting, George Mason University



Recovery (CDBG-DR) funds. Contracted to develop and implement Compliance and Monitoring plans and support contractor transitions for more than \$14.3 billion of CDBG-DR Programs.

Develop and execute monitoring/testing procedures to test compliance in accordance with the policies and procedures developed for the RESTORE Program, as well as with applicable published Action Plans, with federal and State regulations; audit readiness and preparation for HUD; programmatic and contractual requirements.

- Manages service level deliverables and reports performance measurements, including providing timely responses to ongoing Program service requirements.
- Creating monitoring letters for service deliverables procedures not met or incorrectly performed by subcontractor based on the policy and procedures set forth in the Program guidelines.
- Providing guidance and training to team members to enhance their understanding of compliance monitoring and obligations.
- Perform operational assessments and develop policy and procedures. Assist in the continued development of policies and procedures that ensure that the Program is operated in an accurate, efficient, effective and accountable manner.
- Evaluate impacts of detected fraud, waste, and abuse. Also assist in developing and managing internal quality control processes.

Staff Manager (February 2021 – Present)
Texas Water Development Board (TWDB)

TWDB works to ensure Texans have access to sufficient, clean, and affordable water supplies that foster a healthy economy and environment. collecting and disseminating water-related data; assisting with regional water supply and flood planning that contributes to preparing the state water plan and state flood plan; and administering cost-effective financial programs for constructing water supply, wastewater treatment, flood control, and agricultural water conservation projects. Perform assessment on policy accounting policies and procedures that have been established for TWDB and to assist employees as they work to achieve the objectives set by the organization.

- Assisting in documenting financial policies and procedures related to their day-to-day operations.
- Assessing options for implementing ongoing and structured training programs to assist with staff onboarding, transitions, and professional growth.
- Assisting client to develop and implement process for monitoring loan covenants for compliance with applicable regulations, reconciling monthly payables and revenues.
- Assisting client to develop and implement process for reconciling payables monthly and tracking revenues on an accrual basis for better adherences to GAAP.
- Developing a Risk Assessment and Business Impact Analysis (BIA) process to identify potential threats and their impact.

Staff Manager (April 2021 – December 2021)
Texas Department of Housing and Community Affairs (TDHCA)

TDHCA is responsible for administration not the Texas Rental Relief Program (TRRP) which provides emergency funds to help eligible Texas renters pay rent and utility bills (including past due rent and utilities). CohnReznick has been contracted by TDHCA to help administer this program by reviewing applications submitting by tenants and landlords in the Neighborly system.



- Providing Quality Assistance and Quality Control and performing eligibility reviews based on the Program policies and procedures.
- Assistance in implementing comprehensive compliance monitoring performance aligned with regulatory requirements.
- Providing guidance and training to team members to enhance their understanding of compliance monitoring and obligations.
- Verifying analysis of daily data analytics and assessment of program applications set forth in the Program guidelines.
- Performing Fraud Waste and Abuse risk analysis of irregular applications and identifying fraudulent behavior(s). Identified these gaps and recommended corrective actions.
- Monitoring and tracking regulatory and program guidance changes to ensure ongoing compliance.



Carson Phillips

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Carson Phillips has 10+ years of experience in federal grants management and has served in roles directly interfacing with the federal agency making grant awards as the prime recipient and acting as a passthrough to subrecipients. She has Carson Phillips has 10+ years of experience in federal grants management and has served in roles directly interfacing with the federal agency making grant awards as the prime recipient and acting as a passthrough to subrecipients. She has also served in roles where she was a subrecipient of federal awards passed through state agencies and has advised on strategy. She is a credentialed Certified Grants Management Specialist and a sought-after speaker who regularly leads workshops and presentations on federal grant compliance.

Carson has a variety of experience supporting client's grant management portfolios including federal funds from Housing and Urban Development (HUD), Environmental Protection Agency (EPA), Administration for Children and Families (ACF), and other state, local, and private funding sources. Her experience spans across 42 states and includes the full grant lifecycle from application to closeout. She has worked with a variety of grant management platforms and has an eye for supporting development of a strong system that has robust capabilities for prime grantee oversight, is practical for program officer use, and is user-friendly for subrecipient reporting and reimbursement requests.

She specializes in launching large, new programs with strong infrastructure to avoid compliance pitfalls. In the aftermath of the COVID-19 Pandemic, Carson supported a large childcare company to set up a new grants management department which processed over 4,500 grants. She was instrumental in developing the compliance infrastructure for a Greenhouse Gas Reduction Fund Solar for All project. Similarly, she supported a national nonprofit apply for, receive funding, and launch a new infrastructure program to preserve affordable housing.

Prior to joining CohnReznick, as Executive Director of the South Carolina Service Commission, Carson successfully applied for public and private funding, managed statewide competitive grant opportunities, awarded grants, completed risk assessments, designed, and implemented

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 4 and 8

Senior Grant Manager – Task Areas 1, 2, 6, 10, 12, 15, 16 and 17

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
6. Action Plan Development and Amendments
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- B.A. Psychology, Focus on Social Psychology, Clemson University
- B.A. Sociology, Focus on Industrial Sociology, Clemson University

Certifications

- Certified Grants Management Specialist (CGMS)



monitoring schedule, and closed out awards. She led a team of seven to completely update all written policies and procedures for the Commission and trained new staff on operations. She was responsible for oversight of monthly expenditure reviews, drawing funds, and issuing payment to subgrantees for reimbursement on federal grants totaling ~\$4M annually, and was also responsible for the development, creation and implementation of Salesforce as the Commission's system of record. Carson created reports and other collateral material for the federal agency, UWASC Board of Directors, SC Service Commission Board of Commissioners, elected officials and general audiences. She led a communications campaign including TV ads, billboards, and social media outreach that yielded over \$600,000 in in-kind donations and exponentially increased web traffic and social media impressions.

During her time at the United Way Association of South Carolina, Carson responded to 6 federally declared natural disasters. During the floods of 2015, she served on the Executive Committee of the state VOAD who worked closely with the state Emergency Management Division and the Federal Emergency Management Agency to determine strategy for response and recovery.

EXPERIENCE

Project Manager (January 2023 – Present)

Louisiana Office of Community Development – Disaster Recovery Unit (LA OCD DRU)

CohnReznick provides Software Evaluation and Support Services for the Economic Development and Infrastructure (ED&I) Program team for the Office of Community Development, Disaster Recovery Unit. The ED&I programs are funded by allocations from the Department of Housing and Urban Development's (HUD) Community Development Block Grant Disaster Recovery Program (CDBG-DR) with the objective of assisting the state in long-term recovery efforts

- **Process & Program Workflow Optimization:** Recommend and implement improvements to processes, structure, and resource use in coordination with OCD. Implementation of monthly subrecipient report to include milestone tracking activities.
- **System Support:** Collaborate with developers and OCD to manage system updates, testing, and requirements.
- **Data & Reporting:** Align and standardize data from multiple sources, define reporting needs, and deliver scheduled reports. Reports integrate data from state fiscal system of record, DRGR, and Grant Management Solution.

Training: Update and tailor technical specification training materials for revised processes and user-specific needs.

Project Manager (March 2025 – Present)

Clean Energy Fund of Texas

CohnReznick provided advisory services related to the Clean Energy Fund of Texas related to their Solar for All Program, the CHARGE Initiative. Working primarily with CEFTX, and in collaboration with their Program Partners, CohnReznick was a thought partner for all elements of a launching a new program; from developing an application, review and selection process, drafting program guidelines, written policies and procedures, to conducting financial reconciliations, and developing subrecipient trainings.

- **Program Implementation and Federal Compliance Infrastructure:** We developed and implemented program policies, procedures, and systems to ensure full adherence to 2 CFR 200, EPA Terms and Conditions, and Solar for All Terms and Conditions.
- **Technology and Reporting Systems:** We advised CEFTX on configuring systems for tracking budgets, milestones, and deliverables, including contingency planning for funding disruptions. In instances where the selected technology



could not meet all of the needs of the program, CohnReznick advised on wraparound products that could accomplish the program goals.

- Subrecipient Support and Oversight: Our team structured the subrecipient application and review process to ensure proper governance. Further, we established and enhanced systems necessary for effective grant management, including financial tracking, reporting, and compliance monitoring.
- Stakeholder Coordination: CohnReznick worked in collaboration with CEFTX and its program partners to identify stakeholders, define disparate and coordinated scopes of work, and establish a unified framework for engagement, implementation, and accountability across all program activities.

Project Manager (January 2023 – Present)

ROC USA

CohnReznick worked with ROC USA to write and submit their application through Grants.gov to HUD to apply for \$75MM in funding to be distributed across 29 ROCs identified in the application through PRICE funding. Projects were sourced from throughout their national footprint and included acquisition, infrastructure, infill, and resilience activities. The grant was funded and CohnReznick is now supporting the implementation of the project.

- Provide grant writing and application management, including proposed budget;
- Attend client management meetings to provide updates on progress;
- Provide technical assistance on 2 CFR 200 requirements.

Project Manager (December 2021 – April 2025)

Bright Horizons – Centralized Funding Administration Process

CohnReznick provides consulting services to Bright Horizons, one of the largest for-profit childcare providers in the world, to seek federal funding for various costs, such as loss of revenue, incurred as a direct result of the COVID-19 pandemic. The team assists Bright Horizons in identifying, applying for, reporting on, and reconciling federal and state funding received across over 500 childcare centers in over 30 states. Our professionals are also responsible for creating and maintaining standard operating procedures that document internal controls against fraud, waste, and abuse. Estimated funds pursued are \$400 million. In conjunction with Bright Horizon's staff, our team secured over \$225M in grant funding to support the preservation of childcare across the country.

- Identify eligible grant opportunities across all states of operation;
- Prepare and submit over 4,500 grant applications;
- Ensure compliance to specific grant requirements of over 260 unique grant programs
- Provide technical assistance on 2 CFR 200 requirements;

Create robust standard operating policies and procedures to ensure proper control environment;

- Generate weekly reports on progress;
- Perform reviews of all project workflows;
- Identify & correct discrepancies the system of record.
- Provide overall management and oversight over staff;
- Prepare reports to executive team, local operations, and other unique audiences to communicate progress.

**Project Manager, Research Lead (January 2023 – May 2025)****City of Atlanta Department of Grants and Community Development**

CohnReznick has been asked to provide project and grant management support for the City's Department of Grants and Community Development (DGCD) federal grant programs including CDBG, HOME, and HOPWA. Specifically we have been tasked to serve as expert advisors performing fund reconciliations, environmental reviews, application reviews, underwriting, and revising policies/procedures and SOPs for DGCD.

- Provide overall management and oversight over staff and subcontractors;
- Attend client management meetings to provide updates on progress;
- Provide technical assistance on 2 CFR 200 requirements.
- Oversee execution of NEPA compliant HUD Environmental Reviews for each of the categories
- Oversaw review of HOME applications, development of review tool

Project Manager (January 2024 - May 2024)**Coalition for Green Capital – Legal Services Procurement**

CohnReznick supported CGC's efforts to solicit legal services via a full and open competition, in compliance with procurement policies set forth in 2 CFR Part 200. CohnReznick supported each stage of the solicitation process from drafting, publishing and distributing, and developing selection criteria for bids related to three solicitations for legal services. Services were provided in a sprint pace to meet the client's need to release an RFP and host competition ahead of internal deadlines.

- Perform GAP analysis on current policies and procedures for 2 CFR 200 Compliance
- Propose updates and draft sample language to update policies and procedures
- Create drafts for RFPs for three distinct solicitations for legal services
- Provide guidance on how to maximize responses via advertising and RFP distribution
- Create a schedule and procedure for receipt of responses
- Create a scoring template for reviewers use
- Create an overall scoring template for overall review
- Provide guidance on maintaining a complete folder of documentation for purposes of demonstrating compliance.

Compliance Manager (February 2023 – August 2023)**City of Columbia**

CohnReznick is responsible for developing grant proposals on behalf of the City of Columbia. The South Carolina Opioid Relief Fund has been the primary source of funding, however the scope of services is expansive to other funding opportunities.

- Provide grant writing and application management, including proposed budget;
- Guide client on deliverables promised in application;
- Share best-practices for grant management;
- Develop stakeholders.



OTHER WORK EXPERIENCE

Executive Director (April 2013 – December 2021)

United Way Association of South Carolina

Carson served as the Executive Director of the South Carolina Service Commission, where she provided leadership to a state-wide portfolio of AmeriCorps programs, representing over \$4M of Federal Funds, matched with local support. The United Way Association of South Carolina serves as the alternative administrative agency for State Commission. This strategic position has given Carson the unique opportunity to serve as part of the both the United Way and State Service Commission networks, aligning on the common goal of volunteerism.

- Skilled leader in change management and implementing strategic planning, leading a team with a \$1.5M Internal Operating Budget.
- Strong ability to identify and interpret federal and state policies governing effective program management.
- Responsible for a portfolio of 20+ AmeriCorps Programs and Volunteer Generation Funds Programs, representing over \$ 4.5M investment of federal and private funds into direct-service programming throughout SC as Prime Grantee
- Responsible for training, monitoring, and enforcing programmatic and fiscal requirements to ensure compliance and mitigate risk while maximizing impact to local communities
- Created communications to regularly engage with constituents and build relational trust, tailored to each audience.



Alisha Johnson

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Alisha Johnson is a Manager with CohnReznick Government Advisory, bringing over a decade of specialized experience in disaster recovery, grants management, and program compliance for federally funded programs, with a strong focus on Community Development Block Grant – Disaster Recovery (CDBG-DR) and CDBG-Mitigation (CDBG-MIT) initiatives. Her work has supported recovery efforts across Louisiana, Texas, and New York, ensuring regulatory adherence and operational excellence.

- Grant Manager to CDBG-DR projects in Louisiana and New York, where she provided support in case management, grant reconciliation, quality assurance/quality control (QA/QC), and client invoicing. Her work consistently ensured compliance with HUD regulations and contributed to the successful execution of disaster recovery programs.
- Assistant Project Officer for CohnReznick's engagement with the Texas Division of Emergency Management (TDEM), where she played a critical role in maintaining 100% federal compliance for over \$547 million in FEMA Public Assistance funds. Her responsibilities included payment processing, procurement consulting, onsite compliance verification, and project closeout reporting, supporting local governments in their recovery from federally declared disasters.
- Served as Program Support Team Lead, managing a five-person team responsible for essential operational tasks such as document management, case file transfers, and program reporting. Her leadership ensured smooth workflow and accurate documentation throughout the disaster recovery lifecycle.
- Worked as QA Eligibility Team Lead on CohnReznick's engagement with the Louisiana Office of Community Development (OCD), where she performed detailed quality checks to ensure compliance with HUD-CDBG regulations and oversaw daily production management, contributing to the integrity and efficiency of the program.
- Served as Grant Manager supporting GrantWorks and the Texas General Land Office, where she reviewed payment requests submitted by Houston and Harris County. Her role focused on ensuring each request met HUD-CDBG compliance standards, reinforcing the accountability and transparency of the CDBG-DR program.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 5

Senior Grant Manager – Task Areas 2, 3, 4, 8, 10, and 15

Proposed Task Areas

2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
15. Grant Management

Education

- M.A., Human Resource Management, Ashford University
- B.S., Criminal Justice, Southern University and A&M College



Currently serves on-site in North Carolina in the role of Grant Manager for North Carolina Emergency Management (NCEM) assisting the State with the management and oversight of federal disaster recovery grants related to Tropical Storm Helene, providing technical guidance, ensuring regulatory compliance, and supporting the efficient administration of recovery funds.

EXPERIENCE

Grant Manager (October 2024 – Present)

Department of Public Safety, North Carolina Division of Emergency Management (NCEM)

Led by CohnReznick professionals with expertise and disaster recovery grant management, CohnReznick serves as the prime contractor to the North Carolina Department of public safety, division of emergency management for grant administration for public assistance programs. CohnReznick is responsible for establishing procedures, processes, and systems to make grant administration, efficient, effective, and compliant with federal requirements. Our team performs complex grant coordination, financial, and programmatic, compliance, technical assistance, and administration work to plan, organize, and monitor, federally funded disaster grants within the state of North Carolina.

- Conduct outreach and training activities;
- Develop and execute specific program guidance;
- Ensure maximum participation from applicants in the state and federal disaster assistance programs;
- Provide technical assistance for database administration;
- Maintain relationships with federal state, local tribal, NGO, and private sector, logistic stakeholders to collaborate recovery efforts

Project Manager (January 2025 – July 2025)

City of New Orleans, Chief Administrative Office

As the prime contractor, CohnReznick led the execution of a comprehensive labor audit on behalf of the City of New Orleans, initiated through its Chief Administrative Office (CAO) and funded by the American Rescue Plan Act (ARPA). The audit focused on evaluating contractor compliance with the City's Living Wage, Local Hire, and Equitable Business Opportunity (EBO) ordinances for contracts active between January 1, 2020, and October 2024.

- Managed administrative project functions, including budgeting, invoicing, subcontractor coordination, and resource planning to ensure efficient and compliant program operations;
- Oversaw the development and implementation of QA/QC protocols, including statistically valid sampling methodologies, testing procedures, and compliance monitoring tool;
- Guided compliance assessments of Living Wage, Local Hire, and EBO ordinances through agency interviews, document collection and reviews;
- Provided process identifying enhancements and potential corrective actions to strengthen audit quality and effectiveness

Project Manager (March 2022 – October 2024)

State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU) QA/QC

CohnReznick plays a critical role in supporting the administration and oversight of federally funded disaster recovery programs, including Community Development Block Grant – Disaster Recovery (CDBG-DR) and CDBG-Mitigation (CDBG-



MIT). The team assists in the development and refinement of policies and procedures to ensure that programs such as RESTORE Louisiana, Louisiana HAF, and ERAP are operated with accuracy, efficiency, and accountability. This includes testing program operations for compliance with HUD-approved Action Plans, sampling applicant files at both eligibility and construction stages, and implementing robust monitoring protocols to detect and prevent fraud, waste, and abuse of federal funds. The engagement also involves designing and executing controls to eliminate duplication of benefits from sources such as FEMA, insurance, and other federal assistance, and ensuring alignment with federal and state regulations, including the State's contractual obligations with HUD.

- Supported Program and Project Managers in achieving strategic goals and delivering on federally mandated disaster recovery program requirements, with a focus on compliance and performance tracking;
- Documented internal procedures and developed standardized checklists, tools, and templates to promote consistency and efficiency across CDBG-DR and CDBG-MIT program operations;
- Collected and organized data required for HUD, state agencies, and other stakeholders to support reporting on program activities, fund utilization, and compliance metrics;
- Participated in User Acceptance Testing (UAT) for system updates related to disaster recovery program management platforms, and provided training to team members to ensure smooth adoption and operational continuity;
- Engaged in regular meetings with state clients and program contractors to discuss program performance, compliance issues, and continuous improvement strategies for federally funded recovery initiatives.

Manager (March 2021 – March 2022)

Texas Department of Housing & Community Affairs

CohnReznick served as the prime contractor to the Texas Department of Housing and Community Affairs (TDHCA) for the implementation of the Texas Rent Relief Program (TRRP), a federally funded initiative aligned with the goals of disaster recovery and housing stabilization. While TRRP was funded through the U.S. Treasury's Emergency Rental Assistance Program, the operational structure and compliance oversight closely mirrored those of CDBG-DR and CDBG-MIT programs. CohnReznick's responsibilities included full-cycle grants management, program compliance monitoring, and case review to ensure equitable and efficient distribution of funds to eligible applicants impacted by the COVID-19 pandemic.

The team conducted thorough reviews of applicant files to detect duplicate applications, verify eligibility, and prevent duplication of benefits from other sources such as FEMA, insurance, or other federal assistance. CohnReznick also led efforts in appeals processing, fraud detection, and applicant communications, ensuring that all activities adhered to federal and state regulations and contractual obligations.

- Performed initial and second-level case reviews within the system of record, verifying applicant eligibility and setting up budgets for draw requests in alignment with federal program guidelines;
- Approved draw requests and issued formal communications to applicants, ensuring compliance with program requirements and accurate fund disbursement;
- Communicated with landlords, tenants, and utility providers to resolve documentation issues, clarify payment details, and confirm participation in the program;
- Maintained audit logs for missing documentation and tracked resolution to ensure complete and compliant applicant files;
- Linked landlord and tenant applications in the system to facilitate coordinated review and payment processing;
- Conducted outreach to landlords and utility providers to confirm acceptance of direct payments, supporting program efficiency and reducing payment delays;
- Finalized application dispositions in the system, ensuring accurate recordkeeping and compliance with program closure protocols;



- Reviewed and processed first-level appeals, applying federal and state policy guidance to ensure fair and consistent outcomes for applicants seeking reconsideration.

Grant Manager (March 2020 – March 2021)

GrantWorks, Inc., serving Texas General Land Office

CohnReznick, as a teaming partner, provided critical support in financial monitoring, grant administration, and project management for the State of Texas's recovery efforts following Hurricane Harvey, one of the largest CDBG-DR-funded programs in history with a \$5 billion allocation. The engagement focused on ensuring program compliance, accurate case review, and effective grants management across multiple housing recovery activities, including acquisition, reimbursement, rehabilitation, and reconstruction.

Regular responsibilities included evaluating applicant eligibility for zero-interest, forgivable loans, conducting thorough duplication of benefits (DOB) reviews, and ensuring alignment with HUD regulations and state program policies. The team also supported the development of formal communications and documentation to guide applicants through the recovery process and maintain transparency and accountability.

- Reviewed draw requests and applications for housing recovery activities, including acquisition, reimbursement, and homeowner/city-managed rehabilitation and reconstruction, ensuring compliance with CDBG-DR program guidelines;
- Determined applicant eligibility by evaluating ownership documentation, principal residency, adjusted gross income, child support obligations, mortgage status, disability verification, insurance coverage, Xactimate estimates, and duplication of benefits from FEMA, insurance, and other sources;
- Conducted detailed case reviews using Geographic Information System (GIS) mapping and National Objective documentation to validate eligibility and program alignment;
- Identified missing, incomplete, or inconsistent information, including personally identifiable information (PII), and drafted formal communications such as Requests for Information (RFI), Conditional Approvals, Notices to Proceed (NTP), and Approval Letters to support program compliance and applicant guidance.

Eligibility Team Lead (April 2017 – March 2020)

State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU) QA/QC

Recovery Unit (OCD-DRU). Funded through HUD's Community Development Block Grant – Disaster Recovery (CDBG-DR) program, Restore Louisiana supports long-term recovery for homeowners impacted by federally declared disasters. CohnReznick's role focused on ensuring program compliance, validating case reviews, and identifying potential duplication of benefits (DOB) to safeguard federal funds and uphold HUD standards.

The team developed and executed monitoring protocols to assess compliance with federal and state regulations, including the State's contractual obligations with HUD. These efforts helped maintain program integrity and supported accurate and equitable distribution of disaster recovery funds.

- Reviewed and analyzed homeowner case files to ensure consistency and compliance with CDBG-DR program policies, including eligibility determination, income verification, and duplication of benefits analysis;
- Developed and implemented QA/QC processes to monitor adherence to federal and state regulations, and to verify compliance with HUD contractual agreements;
- Provided training and technical assistance to OCD-DRU staff and other stakeholders on program enhancements, policy updates, and compliance procedures to support continuous improvement and operational efficiency.

**Assistant Recovery Office (August 2016 – April 2017)**
Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with deep expertise in disaster recovery grant management, the firm served as the prime contractor to the Texas Division of Emergency Management (TDEM) for federal grant administration. This engagement provided the oversight and execution of federally funded disaster recovery efforts, including the establishment of standardized compliance protocols, technical assistance, financial monitoring, and centralized reporting. CohnReznick's work ensured that recovery funds were administered efficiently, transparently, and in full compliance with federal and state regulations.

The team was responsible for managing the full lifecycle of disaster recovery grants—from application intake and eligibility review to duplication of benefits analysis, appeals processing, and project closeout—while facilitating coordination between subgrantees, state agencies, and federal entities.

- Performed complex grant coordination and compliance monitoring to support the administration of federally funded disaster recovery programs;
- Conducted applicant briefings and outreach, ensuring proper intake and processing of grant applications, and monitored both financial and programmatic aspects of awarded projects for compliance;
- Reviewed grant documentation and payment requests, verifying completeness and accuracy prior to submission to federal authorities, and ensured projects adhered to approved scopes of work and timelines;
- Provided technical assistance to grant recipients, offering guidance on documentation requirements, resolving project worksheet (PW) issues, and supporting appeals and scope changes;
- Performed budget monitoring and site inspections, documenting progress, identifying delays or deviations, and ensuring compliance with procurement and contracting regulations;
- Evaluated reimbursement opportunities for local jurisdictions and state agencies, helping maximize eligible recovery funding;
- Ensured compliance with federal, state, and local regulations through ongoing monitoring, quarterly status reviews, and proactive technical support;
- Facilitated communication between subgrantees, state agencies, and federal partners to streamline grant administration and resolve issues efficiently;
- Processed scope changes, time extensions, and quarterly reports, maintaining accurate records and supporting program transparency;
- Monitored reimbursement requests and provided continuous oversight to ensure proper use of disaster recovery funds and adherence to program guidelines.

Eligibility Analyst (January 2015 – June 2016)
New York State, Governor's Office of Storm Recovery (GOSR)

CohnReznick was contracted by the State of New York to provide compliance and integrity monitoring services for disaster recovery programs funded through HUD's Community Development Block Grant – Disaster Recovery (CDBG-DR). The engagement focused on ensuring that program implementation aligned with the approved Action Plan, documented procedures were followed, and that federal funds were protected from fraud, waste, and abuse. CohnReznick's work supported the state's long-term recovery efforts by validating program integrity and strengthening internal controls.

- Interfaced with the Governor's Office of Storm Recovery (GOSR) CDBG-DR team to collect and organize documentation for application creation, ensuring properties were prioritized appropriately based on match needs and program criteria;



- Conducted case reviews to verify eligibility and compliance with CDBG-DR program requirements, including income verification, ownership documentation, and duplication of benefits analysis;
- Supported grants management and financial oversight by compiling monthly labor and direct cost data for contractor and subcontractor billing, contributing to accurate invoicing and transparent fund tracking;
- Identified potential compliance risks and contributed to the development of monitoring strategies to detect and prevent misuse of federal disaster recovery funds.

Eligibility & Benefits Analyst (August 2007 – November 2011)

Hammerman & Gainer Inc. (HGI)

The Road Home Homeowner Assistance Program was one of the largest housing recovery initiatives in U.S. history, created to support Louisiana residents impacted by Hurricane Katrina. Funded through HUD's Community Development Block Grant – Disaster Recovery (CDBG-DR) program, the program provided financial assistance to eligible homeowners to support long-term recovery and housing stabilization. Subcontractors played a critical role in processing remaining applications, disbursing award funds, and completing closeout activities in accordance with federal and state program requirements.

- Served as an Eligibility & Benefit Analyst, conducting comprehensive case reviews of applicant and third-party documentation to determine eligibility under CDBG-DR program guidelines;
- Reviewed and verified documentation for compliance with program policies, including income, ownership, residency, and benefit history;
- Facilitated the collection and validation of required documents, ensuring applicants were prepared for final award disbursement and program closeout;
- Provided support in file documentation and quality control, maintaining audit-ready records and assisting in compliance verification;
- Identified files ready for closing, performing QA/QC reviews to confirm all program requirements were met prior to final disposition;
- Prepared and reviewed closing documents, ensuring accuracy and completeness in alignment with HUD and state standards;
- Conducted duplication of benefits reviews to ensure federal funds were not duplicated by other sources such as FEMA, insurance, or other assistance programs.



Malissa S. Jackson

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Jackson has over 10 years of experience in providing program support, grant management and compliance monitoring for FEMA’s Hazard Mitigation Grant Program, 404/406 Mitigation, FEMA Individual Assistance/Public Assistance, and Community Development Block Grant-Disaster Recovery.

Since joining CohnReznick in 2016, Ms. Jackson’s focus has been on supporting disaster recovery programs in program compliance, quality assurance, and quality control for Restore 2016, Restore 2020, Louisiana Homeowner’s Assistance Funding (HAF), Texas GLO, Texas HAF, Massachusetts Emergency Management Agency, and other projects as requested.

EXPERIENCE

Eligibility QA/QC Team Lead (January 2024 to Present)
State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU) Restore Louisiana Homeowner Assistance Program 2020 (RLHP)

CohnReznick provided Quality Assurance and Quality Control (QA/QC) services for the Restore Louisiana (Restore) Homeowner Assistance 2020 Program for the Office of Community Development, Disaster Recovery Unit. Malissa reviews homeowner files for consistency and compliance with all Program policies, including but not limited to Program eligibility, income determination, and duplication of benefits. She also develops and execute processes for monitoring compliance with federal and state regulations and the State’s contractual agreements with HUD.

Team Lead (May 2023 – Present)
State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU)

Funded through the Community Development Block Grant Disaster Recovery Program (CDBG-DR) from the U.S. Department of Housing and Urban Development, the Restore Small Business Loan Program aims to use the \$96 million allocation to aid in the economic recovery of small businesses affected by Hurricanes Laura, Delta, Ida, and/or the May 2021

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 5

Senior Grant Manager – Task Areas 2, 3, 4, 8, 10, 12 and 15

Proposed Task Areas

- 2. Financial Compliance, Oversight, and Fraud Prevention
- 3. Duplication of Benefits (DOB) Compliance
- 4. Procurement Compliance and Monitoring
- 5. Claims, Appeals, and Case Reviews
- 8. Program Performance Monitoring and Evaluation
- 10. Audit Readiness and Monitoring Support
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- Ph.D. Candidate, Public Policy, Southern University and A&M College
- M.P.A., Public Administration, Southern University and A&M College
- B.S., Biology, Southern University and A&M College



Severe Storms. CohnReznick is tasked by the State of Louisiana to provide QA/QC services to ensure eligible applications meet federal and state regulations and comply with the State's contractual agreements with HUD. Malissa supports the Project Manager by reviewing documentation submitted by subrecipients on behalf of small businesses for program eligibility and compliance, advising OCD-DRU staff in developing operational procedures and policies related to program implementation, and performing QA/QC reviews of applicant records, specifically in the areas of business eligibility, underwriting reviews, and closing documents review.

Project Manager (October 2022 – Present)**State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU)**

Funded through the U.S. Department of the Treasury and administered by the Louisiana Office of Community Development, the Louisiana Homeowners Assistance Fund (HAF) Program provided an allocated \$146.7 million in funding to eligible homeowners to prevent mortgage delinquencies, defaults, and foreclosures. CohnReznick was tasked by the State of Louisiana to provide QA/QC services to ensure approved funds met local and federal compliance. Malissa led the team in performing reviews of applications submitted in accordance with the LA HAF program requirements. She also established performance goals and benchmarks, created monthly reports, and met with vendors to discuss program progression. Upon program completion, Malissa aided the client in identifying the most efficient use of the remaining funds (\$2.5 million) and is assisting with reconciling outstanding program action items.

Eligibility Reviewer (January 2022 – October 2022)**Massachusetts Emergency Management Agency (MEMA)**

FEMA provides supplemental financial assistance to state, local, and tribal governments and certain private non-profit organizations for emergency protective measures that may be eligible under FEMA's Public Assistance Program in accordance with the COVID-19 Emergency Declaration. CohnReznick provided support to the client by reviewing documentation submitted by applicants to ensure program guidelines were being met. Malissa reviewed documentation submitted by state and local agencies to validate costs eligible for reimbursement through the FEMA PA Grant program. She also created project training documents and assisted with onboarding new team members.

Team Manager (June 2021 – January 2022)**Texas Department of Housing and Community Affairs (TDHCA)**

The Texas Rent Relief Program (TRRP) is administered by the Texas Department of Housing and Community Affairs (TDHCA). TRRP is funded through the U.S. Treasury's Emergency Rental Assistance funds passed under the Consolidated Appropriations Act, 2021. The program provided rental and utility assistance to qualifying applicants to prevent housing instability, potential eviction, and financial hardship for tenants and landlords because of the COVID-19 pandemic. CohnReznick provided Application Eligibility Review services to TDHCA. Malissa managed the Notification Team, which served as a liaison between all program departments and the call center. The team resolved all applicants' issues reported by the call center. Malissa developed SOPs for the team related to program guidelines and procedures. She also trained all team members.

Subject Matter Expert (December 2019 – June 2021)**Texas General Land Office (GLO)**

CohnReznick was engaged as a subcontractor with the State of Texas for the Hurricane Harvey Disaster Recovery Program, a key component of the State's long-term recovery effort due to Hurricane Harvey. The State of Texas received



approximately \$5.6 billion in HUD CDBG-DR funds for long-term recovery efforts post-Hurricane Harvey. Approximately \$2.3 billion in funds were passed through the Texas GLO to Houston and Harris County to carry out programs within their local jurisdiction, with the remaining funds used by the Texas GLO for their direct implementation of state-run homeowner and infrastructure programs. Malissa served as a subject matter expert on the Strike Team. She provided training, process development, and policy guidance to Harris County for the CDBG-DR Program.

Eligibility QA/QC Team Lead (April 2017 to December 2019)

State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD/DRU)

CohnReznick provided Quality Assurance and Quality Control (QA/QC) Services for the Restore Louisiana (Restore) Homeowner Assistance Program for the Office of Community Development, Disaster Recovery Unit. The Restore program is funded by allocations from the Department of Housing and Urban Development's (HUD) Community Development Block Grant Disaster Recovery Program (CDBG-DR) with the objective of assisting the state in long-term recovery efforts. Malissa assisted OCD-DRU staff with the design and enhancement of the processes, policies, and procedures for the Restore program. She developed eligibility QA/QC training materials and trained all new hires.



Geoffrey Magon

Director | CohnReznick Advisory LLC

BIOGRAPHY

Geoffrey has over fourteen years of experience in the project management of Federal, State and local programs. He has held roles focused on program design and project management, grant and contract management, and business analytics. His specific experience includes CDBG, CDBG-DR, HOME, NSP, and LIHTC project development and subsidy layering.

- Grant administration for Environmental Protection Agency (EPA), Federal Emergency Management Agency (FEMA) and U.S. Department of Housing and Urban Development (HUD) funded projects
- Experienced in Program Design and Implementation (Housing and Economic Development programs)
- Stafford Act compliance for disaster recovery projects
- Data Architecture Development for Program Design, Development, and Reporting.

EXPERIENCE

Director (March 2025 – Present) Inclusive Prosperity Capital

Geoffrey led CohnReznick’s technical assistance to Inclusive Prosperity Capital (IPC) in launching its EPA-funded Solar for All program. He oversaw the development of IPC’s compliance infrastructure and provided strategic guidance on federal grant management.

- Developed IPC’s Compliance Framework Manual, including workflows, risk assessments, and oversight protocols.
- Created tools and templates for procurement, financial management, and subrecipient oversight.
- Provided day-to-day oversight on draw reviews, EPA/OIG reporting, and subrecipient payment processing.
- Delivered training and technical assistance on Davis-Bacon (DBRA), Uniform Relocation (URA), National Historic Preservation Act (NHPA), Build America Buy America (BABA), and Environmental Review.
- Reviewed and advised on IPC’s internal policies, procurement practices, and conflict of interest protocols.

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 6, 9, 13, and 16

Senior Grant Manager – Task Areas 1, 2, 3, 4, 5, 7, 8, 10, 12, 15, and 17

Proposed Task Areas

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

Education

- B.A., Sociology with an Economics emphasis, University of Illinois



Director (January 2025 – Present)

HUD Technical Assistance – City of Asheville and CDBG-DR Universal Notice

CohnReznick was engaged by HUD to provide direct technical assistance to the City of Asheville following Hurricane Helene and was also engaged to support HUD's national rollout of the CDBG-DR Universal Notice for financial management. Geoffrey played a dual role, supporting local implementation and contributing to national-level policy and tool development.

- For the City of Asheville, Geoffrey provided TA regarding the launch of the city's Business Restabilization Grant Program using CDBG funds, providing training, compliance oversight, and capacity-building support to city staff and subrecipients.
- He reviewed program materials, assessed subrecipient readiness, and facilitated coordination with HUD to ensure alignment with federal requirements.
- At the national level, Geoffrey led the development of financial management tools for HUD to distribute to CDBG-DR grantees, including a Financial Certification Package and guidance on proficient financial controls, procurement procedures, and fraud prevention.
- He co-authored policies and procedures templates for disaster recovery websites, duplication of benefits (DOB) prevention, timely expenditure of funds, and conducted staffing and capacity assessments to support grantee readiness.

Senior Manager (May 1, 2023 – May 30, 2024)

Community Preservation Corporation

CohnReznick worked with the Community Preservation Corporation (CPC) to assist them in assessing the feasibility of their program design, review of their existing policies and procedures, highlight potential gaps in their policies and procedures, assessed their Implementation and Administration Plan, and provided an analysis of the GGRF National Clean Investment Fund (NCIF) Notice of Funding Opportunity (NOFO).

- Geoffrey served as CPC's on-call advisor during the application development and award negotiation process. He advised executive and program level staff regarding EPA specific compliance requirements, 2CFR 200 requirements, federal cross cutting requirements (Davis Bacon, URA, Historic Preservation, Build America Buy America, etc.)
- Additionally, he provided advisory services regarding their program design framework, funds flow across entities, and overall budgeting and allowable cost categories.

Senior Manager (January 2023 - Present)

ROC USA

ROC USA is a leader within the manufactured housing and resident owned community industry. Due in large part to their effort in championing the PRICE fund, Congress appropriated funding through HUD under the Housing and Community Development Act of 1974 for manufactured housing and resident owned communities. CohnReznick was contracted by ROC USA based on our experience with new and innovative grant programs - most recently CARES Act and ARPA funding - to assist with preparation, planning, and program design.

- Program Design Support; and
- Program Administration Plan Development.



Senior Manager (September 2022 - Present) **Delaware State Housing Authority (DSHA)**

CohnReznick is engaged to provide Project Management, Accounting & Compliance Reporting for DSHA's State and Local Fiscal Recovery Funds (SLFRF) Program, funded under the American Rescue Plan Act (ARPA). This \$60 million program incorporates several sub-programs to address the critical affordable housing needs throughout the State of Delaware. The Catalyst Fund is designed to redevelop blighted areas unable to be redeveloped by traditional market forces. The Accelerator and Preservation Fund are separate approaches to stabilize and increase the number of affordable housing units throughout the state. Finally, the Market Pressure Relief program seeks to address the rapidly evolving market and economic conditions to ensure that ongoing affordable housing LIHTC developments continue their sustainability.

- Program Design Support;
- Program Administration Plan Development;
- Program Policy, Procedure, and Application Development;
- System of Record and Data Architecture Development;
- Project Application Eligibility Review; and
- Program Compliance and Reporting.

Lead Senior Manager (January 2021- December 2021) **Connecticut DOH – UniteCT Emergency Rental Assistance Program**

CohnReznick contracted with CTDOH to provide support for its Emergency Rental Assistance Program, UniteCT. Our duties included analysis of statutory language from the Consolidation Appropriations Act 2021. We worked with the CTDOH and the Governor's Office of Policy Management (OPM) to develop the State's policies and program eligibility requirements. This \$235 million program was designed to provide rental and utility payment assistance to qualified CT households financially impacted by the COVID-19 pandemic. The intention of UniteCT to help stabilize CT's rental housing market while serving households at or below 80% of HUD's Area Median Income required both effective policies and procedures and quick action to make eligibility determinations. Our firm managed over 250 staff simultaneously and 15 separate non-profit Housing Counseling Agencies throughout Connecticut to perform in-depth reviews of applicant residency and income information and eligibility, as well as landlord ownership information and payment amounts. CohnReznick had the opportunity to assist the State of Connecticut in the disbursement of over \$195 million to more than 27.5k households in a period of less than 8 months.

- Reviewed Treasury guidelines and regulations to develop program policies for UniteCT;
- Collaborated with Yardi Systems on the Rent Relief portal development and customization for UniteCT;
- Developed program procedures, processes, tools, and resources for the application review team;
- Developed outward-facing correspondence templates for application review team;
- Trained and onboarded over 250 internal and external staff on performing application reviews;
- Supported the State's staff in implementing various new guidance, functions, processes, and initiatives; and
- Supported the State and the application review team by addressing complex or problematic applications or program participants and performing conflict resolution.

Senior Manager (April 2019 – November 2022) **Texas General Land Office (GLO)**

CohnReznick as a teaming partner carries out financial monitoring and oversight, grant administration, and project



Management duties in the recovery efforts from Hurricane Harvey. This \$5 billion program is one of the largest awards in CDBG-DR history.

- Relationship management with CohnReznick's teaming partner;
- Provision of management plans for Organizational Conflicts of Interest;
- Program oversight for the City of Houston's Homeowner projects;
- Technical Assistance to the GLO and the City of Houston for their respective Economic Development programs;
- System of Record development and process improvement;
- Program data reporting;
- QA/QC planning, identification, and testing; and
- Guidance on Compliant Policy, Appeals Policy, and Anti-Fraud Waste and Abuse (AFWA) Policy.

Senior Manager (November 2018 - Present)

Texas General Land Office (GLO)

CohnReznick is currently engaged under a contract with the GLO to provide application and underwriting services to facilitate CDBG-DR housing and infrastructure activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside \$250 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

- Assess applicant's ability to construct and operate multi-family housing utilizing CDBG-DR funds;
- Analyzes the financial feasibility of proposed developments;
- Underwrites the allowability and cost reasonableness of all hard construction costs, associated soft costs, and development fees;
- Analyze gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment;
- Develops underwriting tools, reporting templates, and workflow processes; and
- Provides guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.

Analyst (October 2010 – October 2012)

Illinois Department of Commerce and Economic Opportunity

CohnReznick was engaged as a subcontractor in the Illinois "Ike" Disaster Recovery Program, (IDRP) which is a key component of the state's long-term recovery efforts pursuant to the record flooding experienced in 2008. The mission of this program was to disburse approximately \$211 million in HUD's CDBG-DR funds for expenses related to disaster relief, long-term disaster recovery and restoration of infrastructure, housing, and economic revitalization in areas affected by the flooding.

- Geoffrey assisted in the development of policies and procedures for economic development programs which included the state's Community Stabilization Program and Business Assistance program;
- Evaluated the ability of contracted subrecipients and CDFI's to manage revolving loan funds;
- Analyzed the financial feasibility of requested loans;
- Underwrote the allowability and cost reasonableness of all economic development projects submitted to the State of Illinois;
- Analyzed gap funding, identify potential duplication of benefits issues, ensured projects were meeting the economic development public benefit standards for job creation;
- Developed underwriting tools, reporting templates, and workflow processes.



Jessie Handforth Kome

Director | CohnReznick Advisory LLC

BIOGRAPHY

Jessie Handforth Kome is a Director in CohnReznick’s Government & Public Sector Practice, bringing decades of federal leadership experience to her role. Most notably, during her tenure at the U.S. Department of Housing and Urban Development (HUD), she served in senior leadership roles where she shaped national policy and regulatory frameworks for disaster recovery and community development programs.

In 2023, she led the development of a landmark proposed rule at HUD to modernize outdated public benefit and low- and moderate-income job counting requirements across the CDBG, Indian CDBG, and Section 108 loan guarantee programs—introducing streamlined, practical alternatives that reflect current program realities.

Earlier in her career, Jessie played a foundational role in designing policy, data systems, analytical tools, and training that enabled funders and grantees to use data for decision-making, compliance, and storytelling. She also has deep expertise in managing grants that generate ongoing program income, such as the \$7 billion National Stabilization Program, which has produced over \$2 billion in program income.

EXPERIENCE

Director, Office of Block Grant Assistance (March 2020 - January 2024)

U.S. Department of Housing and Urban Development (36 years 8 months)

Executive responsible for multi-billion-dollar portfolio of grant and loan guarantees for community development, affordable housing, economic development, Consolidated Plan, and resilience.

Senior Advisor for Grant Programs, Acting Director, Office of Block Grant Aug 2019 (June 2019 - February 2020)

Advise the Deputy Assistant Secretary for Grant Programs on community, economic development, disaster recovery/resilience, and affordable housing laws, regulations and policies; and on issues, new policies and all requirements essential to CPD's mission. *CDBG, CDBG-DR, Section 108, NSP, HOME, TA, DRGR, IDIS

Proposed Labor Category

Project Lead (Key Personnel) – Task Areas 6 and 10

SME – All Task Areas

Proposed Task Areas

- 6. Action Plan Development and Amendments
- 10. Audit Readiness and Monitoring Support

Education

- MRP, City and Regional Planning, University of North Carolina at Chapel Hill, 1987
- B.A., International Studies, University of North Carolina at Chapel Hill, 1983



Deputy Director, Office of Block Grant Assistance, Acting Director fall 2016- fall 2018 (February 2009 - June 2019)

From fall 2016-fall 2018, served as Acting Office Director providing executive direction and managerial support for four divisions responsible for multi-billion-dollar community development, neighborhood stabilization, and long-term disaster recovery grant programs and the related Section 108 loan guarantee program.

In this position, resolved complex policy issues; developed, defended, and implemented program budgets; translated leadership direction into real-world solutions; designed and launched major competitive grant programs; negotiated grant-management performance metrics; and served as the “owner” for a major mixed financial/grant performance management IT system.

Director, Disaster Recovery & Special Issues Division (August 2007 - February 2009)

Led a 10–12-person division responsible for long-term disaster recovery grants for lower Manhattan (\$3.483 billion), the Gulf Coast recovery (\$19 billion), and other places struck by major disasters. During the rapid changes and complexity that arrived with CDBG disaster recovery “coming of age”, I was responsible for policy development, grantee oversight, TA, travel budgets, staff training, technical writing/editing, and division management.

Community Planning and Development Specialist (July 2002 - August 2007)

As one of two people assigned to what became the Disaster Recovery and Special Issues Division (DRSI) in 2004, Jessie helped iteratively shape the CDBG-DR program and took considerable initiative in developing new approaches and making recommendations, most of which were adopted. Jessie’s focus was on driving recovery forward by streamlining rules while simultaneously increasing program accountability and preventing waste, fraud, and abuse of funds.

Sr. Community Planning & Development Rep. , North Carolina State Office, (February 1998 - July 2002)

Rep for CDBG, HOME, ESG, and HOPWA grantees in NC. Analyzed policy and administered disaster recovery reporting system (DRGR) for headquarters.

Public Affairs/Consumer Relations Officer (April 1997 - February 1998)

Community Planning and Development Rep (December 1995 - April 1997)

Community Planning and Development Specialist (June 1989 - December 1995)

Presidential Management Intern (June 1987 - June 1989)



Nicholas Atiee

Director | CohnReznick Advisory LLC

BIOGRAPHY

Mr. Atiee has over ten years of experience providing grants management, project management, business process improvement, and compliance monitoring services to State and Federal entities. Nicholas has an in-depth knowledge of U.S. Treasury's State and Local Recovery Fund (SLFRF), Coronavirus Relief Fund (CRF), Emergency Rental Assistance (ERAP), State Small Business Credit Initiative (SSBCI), FEMA's Public Assistance (PA), and Hazard Mitigation Assistance (HMA) programs.

Nicholas leads CohnReznick's engagement team to the Office of the Governor of Texas. CohnReznick is the sole vendor to the Office of the Governor of Texas (OOG), providing federal grant oversight and monitoring services for funding received by the State of Texas, including \$15.8B in State and Local Fiscal Recovery Funds and \$472 million in funding for the State Small Business Credit Initiative (SSBCI).

Nicholas leads CohnReznick's engagement team to the Office of National Drug Control Policy (ONDCP). CohnReznick is responsible for performing gap analysis, identifying standardization opportunities, and aligning people, process, data, and technology associated with the High Intensity Drug Trafficking Area (HIDTA) Program's reimbursement process.

During the COVID-19 Pandemic, Nicholas oversaw an engagement team of over 400 staff tasked with providing application eligibility review services for Texas' Rent Relief Program, a \$2 billion program funded by the Consolidated Appropriations Act, 2021 and American Rescue Plan Act of 2021. Specifically, Nicholas implemented an automated data pipeline to manage assignments, track non-compliance, and detect fraudulent and duplicate applications.

From 2018 to 2022, Nicholas was responsible for assisting the State of Vermont in reconciling and allocating \$48 million in insurance proceeds prior to closing DR-4022 FEMA Public Assistance (PA) grants. Nicholas helped the state compile costs, secure funding, and closeout for \$107 million in FEMA Public Assistance (PA) funds.

Throughout 2019 and 2020, Nicholas served as the Hazard Mitigation Manager for TDEM's Hazard Mitigation Assistance programs. In this role,

Proposed Labor Category

Data Manager (**Key Personnel**) – Task Area 7

Senior Grant Manager – Task Areas 1, 2, 4, 5, 8, 10, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
7. Needs Assessments, Market Analysis, and Geospatial Support
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
15. Grant Management

Education

- B.A., Accounting, Southwestern University



Nicholas supported the Deputy State Hazard Mitigation Officer in oversight of TDEM's subrecipients, including the coordination of monitoring and closeout activities, coordination with FEMA, and assisting subrecipients navigate FEMA regulations and State of Texas grant terms and conditions.

EXPERIENCE

Deputy Project Manager (July 2022 - Present)

Office of the Governor of Texas

CohnReznick is the sole vendor to the Office of the Governor of Texas, providing federal grant oversight and monitoring services for funding received by the State of Texas. CohnReznick provides these services for the state's entire portfolio of programs and projects funded by the Infrastructure Investment and Jobs Act (IIJA), the American Rescue Plan Act (ARPA), the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and the Consolidated Appropriations Act of 2021 (CAA). CohnReznick delivers complex grant administration activities, including: monitoring financial and programmatic compliance with state and federal requirements, providing technical assistance to subrecipients and beneficiaries, validating project-level expenditures, reviewing and processing applications for federal assistance, advising on systems development, and leveraging programmatic data to mitigate against fraud, waste, and abuse.

- Develop risk assessments and compliance monitoring plans;
- Monitor both the programmatic and financial aspects of awarded projects;
- Examine subrecipient and state agency support documentation for sub-grant/grant expenditures;
- Verify cost classification and delivery methods for each project;
- Identifying duplicate expenses across projects, subawards, or contracts;
- Ensure deadlines are met, applications or other documentation are complete and correct before submission to federal authorities;
- Monitor activities in accordance with the project guidelines, and payment requests are promptly and correctly processed;
- Conduct briefings and other outreach and training activities; and
- Complete application eligibility reviews in the system of record using the review tool within the system.

Engagement Director (November 2022 – Current)

Office of National Drug Control Policy (ONDCP)

CohnReznick assists ONDCP in their objective to improve the efficiency and effectiveness of the High Intensity Drug Trafficking Area (HIDTA) Program's reimbursement process. CohnReznick is responsible for performing gap analysis, identifying standardization opportunities, and aligning people, process, data, and technology associated with the reimbursement process.

- Complete discovery and gap analysis of HIDTA reimbursement process and analyze people, process, data, and technology for all 33 HIDTA Regions and their 200+ fiduciaries participating in the in HIDTA program.
- Document current state process workflow, technology systems, data models, and data dictionary for all stakeholders in the Program.
- Identify, design, and implement standardization opportunities to improve the Program's reimbursement submission and review process.
- Develop training and coordinate between program stakeholders to the implement standardization opportunities.



Deputy Project Manager (March 2021 – March 2022) **Texas Department of Housing and Community Affairs**

CohnReznick serves as a prime contractor to the Texas Department of Housing and Community Affairs (TDHCA) for the implementation of the Texas Rent Relief Program (TRRP). Funded through the U.S. Treasury's Emergency Rental Assistance Program, TRRP provides rental and utility assistance to qualifying applicants to prevent housing instability, potential eviction, and financial hardships for tenants and landlords as a result of the COVID-19 pandemic. CohnReznick performs all activities necessary to process applications through the entire review cycle, including: detecting duplicate applications; initial reviews; communicating with tenants, landlords, and utility providers; setting up draw requests; detecting fraudulent applications; processing first-level appeals; and providing support, guidance, and direction to applicants and to TDHCA.

- Initial review in the system of record using the review tool within the system;
- Second-level review within the system and setting up the budget for the draw in the applicant file;
- Approve Draw Requests and issue associated approval communication to the applicant;
- Communicate with landlords and tenants for missing documentation, clarification, and payment information through the system of record;
- Maintain audit log history of missing documentation requests until all missing documentation has been received;
- Communicate with landlords being invited to participate in the program by the tenant in the application, and conversely communicating with tenants being invited to participate in the program by the landlord in the application;
- Associate landlord and tenant applications in the system of record;
- Conduct outreach to the landlord or utility provider for determining whether the landlord or utility provider will accept direct payment from the program;
- Place an application into final dispositions in the system; and
- Review and process 1st Appeals.

Project Manager (July 2018-August 2022) **State of Vermont – Agency of Administration/Vermont Emergency Management**

CohnReznick assisted the State of Vermont with the closeout of FEMA-related activities as the result of the aftermath of Tropical Storm Irene. In coordination with the Agency of Administration and Vermont Emergency Management, CohnReznick is tasked to review and reconcile detailed invoices submitted by prior consultants; reconcile the State's insurance claim against FEMA project worksheets (PWs); and develop the records necessary for actual insurance application to PWs.

- Utilize the State's Vision Financial System to reconcile and compile costs and closeout packages for 21 Large PWs totaling \$107 million in Pre-Reduction project costs; including temporary relocation expenses of multiple Vermont State agencies and the Vermont State Hospital, and a \$47 million SRIA Consolidated Subgrant to rebuild the Waterbury State Office Complex (WSOC); Develop disaster accounting and QA/QC processes.
- Review and compile the State's submission to FEMA of Section 324 Management Costs; and,
- Reconcile over \$48 million in State insurance proceeds against State agency PWs, totaling approximately \$120 million in PW Pre-Reduction amounts.

**Compliance Manager (April 2019 – Present; September 2013 – June 2015)**
State of Texas, Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to TDEM for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, centralized data and reporting, and effective quality management protocols, and reviewing and improving procedures addressing reimbursements and financial management.

- Manage the team providing technical assistance for Texas's Hazard Mitigation (HMGP) and Pre-Disaster Mitigation (PDM) Grant Programs, performing complex grant coordination, financial and programmatic compliance, and administration work to administer, organize, monitor, and close federally funded disaster grants within the State of Texas;
- Conduct applicant briefings and other outreach and training activities, ensure grant applications are received and processed properly, and monitor both the programmatic and financial aspects of awarded projects;
- Monitor compliance through regular technical assistance, quarterly status reviews, processing scope changes, time extensions, and ongoing monitoring of reimbursement requests;
- Supervise and drive production of grant management deliverables at the Recipient-level for more than \$400 million of obligated federal funds, including more than 270 in-progress Hazard Mitigation Assistance (HMA) subawards across 17 HMGP and PDM federal awards;
- Develop and oversee a closeout pipeline of more than 350 HMA subawards, totaling approximately \$300 million in obligated federal funds; review and approve financial summary reports, project and account closeout letters to FEMA.
- Oversee disaster accounting production relating to all submitted requests for reimbursement.
- Develop disaster accounting and QA/QC processes.
- Collect source documentation from sub recipients and provided State with necessary documentation to satisfy audit and programmatic closeout requirements;
- Perform complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the state of Texas;
- Conduct applicant briefings and other outreach and training activities, ensure grant applications are received and processed properly, and monitor both the programmatic and financial aspects of awarded projects;
- Ensure deadlines are met, applications or other documentation are complete and correct before submission to federal authorities, and payment requests are promptly and correctly processed;
- Conduct monitoring activities in accordance with the project-worksheet guidelines, verify projects are completed within the approved scope of work, and identify and resolve project and program related issues;
- Review progress reports, payment requests, and provide guidance and assistance to grant recipients on documentation requirements and resolution of project worksheet-related problems;
- Perform budget monitoring and project site inspections, and document progress and/or completion of projects, causes for delays in project-worksheet completion from established timelines, or deviations from the scope of work to ensure procurement and contracting compliance;
- Evaluate opportunities and requirements to provide technical assistance and assist local jurisdictions and state agencies in maximizing reimbursement potential; and
- Ensure compliance with federal, state and local regulations and ordinances.



OTHER PROJECT EXPERIENCE | DK PARTNERS, PC

Lead Auditor (November 2015 – June 2018)

State of Texas, Health and Human Services Commission (HHSC)

Performed agreed-upon procedures designed to determine the completeness, accuracy, and validity of data submitted by Medical Care Organizations (MCO) to Texas HHSC.

- Reviewed the annual Financial Statement Reports (FSRs) of Texas Medicaid and CHIP programs operated by Managed Care Organizations (MCOs) under the Uniform Managed Care Contract (UMCC);
- Performed testing and the recalculation of medical and pharmaceutical expenses claimed for Texas Medicaid and CHIP programs; and,
- Evaluated the design and effectiveness of the corporate allocation methodologies utilized by Blue Cross Blue Shield, Molina Healthcare, and United Healthcare to allocate administrative costs to the Texas Medicaid and CHIP programs.



Orterio Villa

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Orterio is a Senior Manager within the CohnReznick Government and Public Sector. He has 16 years of experience in project management, IT and reporting/analytics directly related to disaster recovery.

Since joining CohnReznick in 2018, his focus has been on supporting OCD Reporting and Data Analytics associated with Restore Louisiana Program 2016, Emergency Rental Assistance Program (ERAP), Restore Louisiana Program 2020 and other projects as requested.

These reporting efforts have included managing the CohnReznick reporting team, the use of Business Objects, the implementation of processes using Python/ML and other tools to improve efficiency and accuracy, and the implementation and use of Power BI to support Restore Louisiana Program 2020, to name a few.

EXPERIENCE

Senior Manager - IT Reporting (Aug 2018 – Present)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD) | Restore Louisiana Homeowner Assistance Program 2016 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the RLHP 2016 Program. This Program was designed to help homeowners repair or rebuild their homes that were damaged by State disaster in 2016.

- Primary focus is reporting, projections, analytics, and compliance monitoring support for Louisiana OCD Housing Recovery Programs; Restore 2016.
- Reporting on the Louisiana Emergency Rental Assistance, and the Housing Assistance Fund Programs.
- Supported improved confidence in reporting and initiated additional reporting that provided actionable insight and supported OCD management and reporting needs.
- Implementation of new reporting tools, including Power BI. CohnReznick's reporting team supported the implementation of the

Proposed Labor Category

Data Manager (Key Personnel) – Task Area 7

Proposed Task Areas

7. Needs Assessments, Market Analysis, and Geospatial Support

Education

- U.S. Naval Nuclear Power School & Prototype

Certifications

- Louisiana POST
- DMAIC 6 Sigma training
- PMBOK Training & certification by PMCC Tech



Power BI, while implementing reports for the new Restore 2016 recovery Program.

Senior Manager - IT Reporting (May 2022 – Present)

The Louisiana Division of Administration, Office of Community Development (OCD), Disaster Recovery Unit | Restore Louisiana Homeowner Assistance Program 2020 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide QA/QC consulting services for the RLHP 2020 Program. This Program was designed to help homeowners repair or rebuild their homes that were damaged by 4 separate State disasters in 2020 and 2021.

- Primary focus is reporting, projections, analytics, and compliance monitoring support for Louisiana OCD Housing Recovery Programs; Restore 2016 and Restore 2020.
- Reporting on the Louisiana Emergency Rental Assistance, and the Housing Assistance Fund Programs.
- Supported improved confidence in reporting and initiated additional reporting that provided actionable insight and supported OCD management and reporting needs.
- Implementation of new reporting tools, including Power BI. CohnReznick's reporting team supported the implementation of the Power BI, while implementing reports for the new Restore 2020 recovery Program.

PRIOR WORK EXPERIENCE

Manager Business Intelligence / Project Manager (May 2007 - Jun 2009)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD) | The Louisiana Road Home Program

Implemented BI and reporting solutions for the \$13B Road Home Program to aid victims of hurricanes Katrina and Rita. Managed a staff of 21 professionals who implemented Business Objects as the business intelligence (BI) solution which supported issuing 2,500 monthly reports, responding to ad-hoc reporting and supported analytics requests. Assisted in the process-design and documentation for the \$750M HMGP follow-on grant program.



Courtney Mangas

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Mangas has nine years of experience in disaster recovery planning and HUD programs. She previously served as a program lead for multiple CDBG-DR Hurricane Harvey recovery programs- totaling \$212 million in CDBG-DR funding- where she was responsible for ensuring compliance with federal, state, and local regulations, developing Standard Operating Procedures for program processes, and overseeing the successful execution of programs and their associated projects. Her expertise is in the development and implementation of HUD-funded programs, including the design and development of program policies and procedures and correlating programmatic and fiscal compliance materials. She is also versed in all levels of grant reporting, subrecipient monitoring and oversight, federal cross-cutting requirements and project and grant closeout procedures and requirements.

EXPERIENCE

Policy and Procedures Subject Matter Expert (December 2024 – August 2025) Capital Good Fund

CohnReznick is providing advisory services for Capital Good Fund’s Solar for All program – the Georgia BRIGHT program. The Georgia BRIGHT program, part of the Solar for All initiative, aims to expand the benefits of solar energy to low-income and disadvantaged communities in Georgia. It includes components like BRIGHT Lease, Community Benefit Solar, and Utility-Led Community Solar, which provide various ways for households and organizations to access solar energy at reduced costs. The program aims to reach between 15,000 and 20,000 households and train up to 1,000 people in solar jobs over the next five years.

Serving as the Policy and Procedures SME, Ms. Mangas was responsible for developing procedures (SOPs, guides, workflows) for grant-related processes such as implementation, reimbursement, Davis Bacon and Related Acts compliance and procurement.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 8

Senior Grant Manager – Task Areas 1, 4, 5, 6, 10, 12, and 15

Proposed Task Areas

- 1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
- 4. Procurement Compliance and Monitoring
- 5. Claims, Appeals, and Case Reviews
- 6. Action Plan Development and Amendments
- 8. Program Performance Monitoring and Evaluation
- 10. Audit Readiness and Monitoring Support
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- B.A., Interdisciplinary Studies, focus in Poverty Alleviation through Sustainable Development, Humboldt State University
- University Study Abroad Consortium (USAC), Puntarenas, Costa Rica and Santiago, Chile, International Political Economy of Latin America

Certifications

- Certified Nonprofit Professional Nonprofit Leadership Alliance (CNP)
- Federal Emergency Management Fundamentals of Grants Management, L0705



Quality Assurance Reviewer (July 2025 - one week)

City of Atlanta, Department of Grants and Community Development, 2025-2029 Consolidated Plan

Ms. Mangas undertook the critical task of reviewing the City of Atlanta's Consolidated Action Plan with a rapid turnaround deadline of just one week. She analyzed the plan for data inconsistencies, alignment with City-objectives and compliance with Action Plan reporting and submission requirements. Her efforts resulted in a more cohesive plan that effectively aligned with the city priorities and enhanced the strategic direction and impact of the initiative.

Programmatic Support (March 2023 – September 2024)

City of Atlanta, Department of Grants and Community Development

Our team was tasked with reviewing and enhancing the City's HUD program policies and procedures to streamline processes and develop HUD-related federal cross cutting requirement procedures. These efforts included a comprehensive analysis of the HOME policy with recommendations for efficiency and enhancement, the development of Standard Operating Procedures for the Uniform Relocation Act and Build America Buy America and an assessment of the Down Payment Assistance income review process for the purpose of clarifying and expediting the review process.

Financial Compliance Reviewer (August 2023 – September 2024)

Mayor's Office of International & Immigrant Affairs

CohnReznick partnered with the City of Atlanta's Mayor's Office of International and Immigrant Affairs (MOIIA) to manage over \$11 million in federal funds supporting the migrant crisis through programs like EFSP-H and SSP. The team developed and implemented comprehensive grant administration and subrecipient monitoring procedures, ensuring compliance and mitigating audit risks. Their efforts enabled 15 subrecipients—many new to federal funding—to successfully meet program requirements.

- Developed Subrecipient Monitoring and Oversight process.
- Performed detailed financial and programmatic reviews of payment requests, verifying eligibility, accuracy, and alignment with grant objectives.
- Led closeout reporting activities, ensuring all subrecipients and the grantee met final reporting requirements and that federal funds were properly reconciled and accounted for.

Subject Matter Expert (June 2020 – November 2023)

Texas General Land Office (GLO), Grant Administration, Project Management

CohnReznick is sub-contracted with Grantworks, Inc. and the State of Texas General Land Office (GLO) to administer approximately \$2.3 billion in U.S. Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) funding for expenses related to disaster relief, long-term recovery, and restoration for Houston and Harris County. We oversee all aspects of program management, including policy and procedural development in line with GLO's action plan and goals, training and technical assistance, as well as program management and implementation.

Additionally, our team performs project reviews to determine project and applicant eligibility for CDBG-DR funds, reviews DOB to ensure CDBG-DR funds are used to address unmet need and utilized as funding of last resort, and we provide underwriting for multi-family and economic development projects. We review payment requests from the City of Houston and Harris County to ensure payment programmatic compliance.

- Advise on program-specific processes and policy requirements
- Review program applications for eligibility and completeness



- Review and process project reimbursement requests
- Develop Standard Operating Procedures for application review and draw processes
- Review program Guidelines and SOP's for completeness and policy compliance
- Complete weekly and monthly reporting requirements to demonstrate overall progress of programs
- Monitor program budget against application and draw requests to ensure funding goals are being met
- Facilitate interagency program meetings.

Disaster Response and Recovery Consultant (June 2018 – June 2020)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the state of Texas;
- Conducts applicant briefings and other outreach and training activities, ensures grant applications are received and processed properly, and monitors both the programmatic and financial aspects of awarded projects;
- Ensures deadlines are met, applications or other documentation are complete and correct prior to submission to federal authorities, monitoring activities are conducted in accordance with project-worksheet (PW) guidelines, projects are completed within the approved scope of work, and payment requests are promptly and correctly processed;
- Reviews progress reports, payment requests, and provides guidance and assistance to grant recipients on documentation requirements and resolution of PW-related issues;
- Performs budget-monitoring and project-site inspections, and documents progress and/or completion of projects, causes for delays in PW completion from established timelines, or deviations from the scope of work to ensure procurement and contracting compliance;
- Evaluates opportunities and requirements to assist local jurisdictions and state agencies in maximizing reimbursement potential;
- Ensures compliance with federal, state and local regulations and ordinances;
- Facilitates communications between sub-grantees, state and federal entities;
- Processes scope changes, time extensions and quarterly reports; and Monitors compliance through regular technical assistance, quarterly status reviews, and ongoing monitoring of reimbursement requests.

OTHER WORK EXPERIENCE

Recovery Coordination Specialist (September 2017 – July 2018)

Federal Emergency Management Agency (FEMA)

Disaster response and recovery efforts in response to federally declared disaster DR-4332 Hurricane Harvey.

- Identified/developed and maintained relevant databases to internal partners, such a MaxTrax and SharePoint



- Assisted in the identification of potential funding sources to leverage recovery program resources and address financial gaps, specifically within the Department of Interior and National Park Service
- Analyzed cadre-wide reports (the Mission Scoping Assessment and Recovery Support Strategy) to identify opportunities for cross-sector collaboration
- Prepared analytical documents as directed, such as the Recovery Support Strategy Matrix
- Researched and synthesized recovery resources and information pertaining to the specific disaster
- Facilitated information flow between Recovery Support Function Field Coordinators and state/tribal and local government leadership
- Facilitated and prepared multi-stakeholder meetings
- Arranged resource coordination meetings/events to facilitate access to resources
- Identified opportunities to coordinate with internal partners and connected RSF Coordinator to appropriate partners within the cadre
- Solicited reports, surveys, site visit findings from various partner agencies, both state and federal, to inform the Mission Scoping Assessment process.

Recovery Coordination Specialist (March 2017 – September 2017)

Federal Emergency Management Agency (FEMA)

Louisiana Resilient Recovery Initiative lead by FEMA and coordinated through the Governor's Office of Homeland Security & Emergency Preparedness. The aim of the initiate, or pilot program, was to promote alternative approaches to watershed management and facilitate cooperation between parish governments.

- Built working relationships with State partners, particularly within the Governor's Office of Homeland Security & Emergency Preparedness
- Coordinated with FEMA national leadership, state and local partners to develop and conduct Louisiana Resilient Recovery (LARR) Governor's Kickoff and Summit events
- Worked with a team of 5 to develop a Standard Operating Procedure (SOP) to be used as a guideline for future Kickoff and Summit events
- Assisted Mitigation cadre members with preparing Louisiana Watershed Study Kickoff presentation and materials.



Jane Brogan

Director | CohnReznick Advisory LLC

BIOGRAPHY

Senior executive with over 20 years' experience, including 15 as a leader in state and local government, delivering disaster recovery, housing, and community development programs. Skilled in designing and executing highly complex and technical programs. Vast experience in developing data-driven policy, program management, regulatory interpretation, compliance, and reporting.

Uniquely understands CDBG-DR requirements and programs from 15 years as a direct grantee. As a practitioner, knows the grantee perspective, has a firsthand understanding of the challenges, and has created programs that meet the needs of communities. Designed and oversaw programs utilizing \$11.8 billion of CDBG-DR funds that helped over 23,000 households, 11,000 businesses, and hundreds of resilient infrastructure projects.

EXPERIENCE

Chief Policy and Research Officer / Managing Director of Policy (February 2015 – January 2022)

New York Governor's Office of Storm Recovery | NY Rising Homeowner Recovery Program

While on staff at the New York Governor's Office of Storm Recovery, worked with program staff to establish compliant design and implementation of the CDBG-DR- funded housing recovery program.

- Repair, reconstruction, reimbursement and elevation of residential owner-occupied structures funded with \$1.85 billion of CDBG-DR funds. Program assisted over 11,000 households including 3,036 elevations.
- Set program priorities, developed policies and procedures, and ensured compliance with HUD regulations, 2 CFR 200, and local laws.
- Provided training and technical assistance to program staff, case workers, and vendors.
- Created eligibility and duplication of benefits frameworks that could scale quickly while withstanding audit scrutiny.
- After identifying need for an additional pathway, worked with program staff and legal to develop a program-led construction option for applicants who were unable to self-manage the construction.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 9

Proposed Task Areas

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

Education

- M.A.S, Environmental Science, University of Sydney, Australia, 2003
- B.A., Psychology, Colgate University, Hamilton, NY, 2002



- Facilitated cross-departmental collaboration to troubleshoot issues, ensure compliance, and strengthen coordination of recovery efforts.

PROFESSIONAL EXPERIENCE

Independent Consultant (Sept 2024 – May 2025)

Advised state and local governments on program design, regulatory interpretation, grant compliance, and funding opportunities.

- Designed a managed retreat program, including a gap analysis to leverage existing resources
- Drafted a CDBG-DR Action Plan including analyzing impacts and mitigation needs
- Developed policies and procedures for HUD's HOME-ARP funding

Hill International, Inc. (July 2023 – Sept 2024)

Vice President

- Served as Subject Matter Expert (SME) in housing, resiliency, grant management, and program management.

Aptim Environmental & Infrastructure LLC (APTIM) (February 2022 – July 2023)

Disaster Recovery Program Director

- Provided program evaluation, grant and regulatory compliance, and policy strategies support to state and local government clients including New York City Housing Authority (NYCHA), Paradise, CA Irrigation District, and Rebuild by Design.

New York Governor's Office of Storm Recovery (GOSR) (February 2015 – January 2022)

Chief Policy and Research Officer (7/2018 – 1/2022)

Managing Director of Policy (2/2015 – 7/2018)

- Co-chief executive responsible for day-to-day operations, design and implementation of programs, compliance, and ensuring budget was aligned with agency's goals.
- Developed and operationalized the agency's policies and procedures for 17 programs funded with \$4.6 billion of CDBG-DR funds.
- Determined funding priorities and established program objectives and measures of success.
- Established processes for cross-departmental collaboration to ensure compliance, assess program effectiveness, and troubleshoot key challenges.
- Coordinated and responded to auditors and established corrective action plans to address findings. Negotiated a repayment down from \$58.7 million to \$2.5 million
- Designed and implemented close out procedures for over 300 projects, 17 programs, and 3 grants.
- Spearheaded the creation of a permanent New York State office responsible for the administration of federal grants as well as State-funded programs addressing climate risk.
- Facilitated in scaling capacity of the agency to 200 staff and established systems and processes to meet its evolving needs.
- Built and grew relationships with representatives of federal agencies, State agencies, and elected officials.
- Developed a grant application using data to show climate risk and vulnerabilities which secured \$35.8 million to enhance the resilience of Public Housing Authorities.
- Monitored and analyzed legislative and regulatory changes ensuring compliance with federal, state, and local laws.
- Oversaw internal and external reporting on program status, budgets, and beneficiaries.



- Through the NY Governor’s Office, aided the Puerto Rican government in identifying recovery need and advocated the federal government resulting in more than \$60 billion of funding for rebuilding.

New York City Office of Management and Budget (OMB) (May 2013 – February 2015)

Unit Head – Program and Policy

- Advised on program design, interpreted regulations and guidance, developed policies and procedures for a portfolio of housing, economic development, infrastructure, and coastal resiliency programs funded with \$4.4 billion of CDBG-DR funds.
- Provided supervision and trained a team of six analysts responsible for development of program procedures, policy analysis, budget planning, grant compliance, monitoring, reporting, and environmental review.
- Helped win a first of its kind federal grant that provided \$176 million for the implementation of two coastal protection projects.
- Performed overall grant management functions including regulatory interpretation, monitoring of program performance and budgets, reporting, and procurement and contract oversight.
- Developed standard operating procedures and training for compliance with procurement, Davis Bacon and Related Acts, Section 3, NEPA, national objective and eligible activity determinations, reporting, and the citizen participation plan.
- Managed monitoring visits including prepping City agency staff and responding to any findings.

Lower Manhattan Development Corporation (LMDC) (April 2007 – May 2013)

Planning Project Manager

- Managed projects supporting September 11, 2001 recovery and revitalization of Lower Manhattan funded with \$2.8 billion of CDBG-DR funds.
- Oversaw over 30 subrecipients and vendors to achieve project completion within scope, regulatory compliance, objectives, and budget
- Reviewed funding applications, monthly status reports, labor reports, procurements, and invoices to ensure compliance
- Worked with other State and New York City government agencies to establish project goals, timelines, and efficiently coordinate all the construction projects occurring in Lower Manhattan
- Directed and managed vendors who performed program management, construction management, inspections, cost estimation, design, environmental review, and legal services.

ADDITIONAL EXPERIENCE

As a CDBG-DR grantee, designed and implemented programs that helped:	
Housing repair/reconstruction/reimbursement	22,831 households
Elevations	4,472 houses
Buyout/Acquisition	700 houses
Multi-family (5+) repair/reconstruction/reimbursement	19,300 units
Affordable Housing/PHA - new construction, rehab, match	23,324 units
Economic Revitalization	11,068 businesses
Infrastructure/Mitigation projects	380 projects



Alicia Bennett

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Alicia Bennett, a Manager with CohnReznick’s Government and Public Sector, has more than 18 years of experience in disaster recovery program support, ranging from actual one on one applicant assistance to client consulting responsibilities.

Currently working on the LA Restore 2020 and 2024 programs, managing the Eligibility team and coordinating with other teams to manage timely feedback on file reviews. Communicating with the client and contractor management on policy and procedure updates. Assigning files for review to respective teams and resolving any file review issues or questions. Creating and updating internal training and tracking documents for reporting. Assisting the reporting team by evaluating the validity of results and researching anomalies. Supporting the deliverables manager by peer reviewing contractor penalties and updating procedures and trackers. Managed a team of 8 responsible for providing QA/QC consulting services for the Louisiana Emergency Rental Assistance Program (LaERAP) and the Homeowners Assistant Fund (HAF). This role included reviewing, confirming and reporting contractor compliance with the US Treasury Department’s program policies, recommending and implementing process improvements, assigning and assisting in reviewing applicant files, managing reporting records, reconciling data, creating project standard operating procedures and assisting senior management, the client and contractors with any specialty requests as needed.

Served as a Senior Consultant on the Restore LA (RELA) project, applying previous knowledge of standard program policies and procedures. Responsibilities included in depth QAQC reviews of applicant files and documents to determine program eligibility, assisting with testing and contractor billing, updating daily reports, conducting weekly audits to report pertinent information to the client and reviewing files for SBA loan reimbursement.

Worked as an Analyst II/Case Manager with Hammerman and Gainer International, Inc. (HGI) for the LA Road Home Program and as an Underwriter II with ICF for the LA Small Rental Road Home Program. Communicated directly with the victims of these two events, making sure they understood the program requirements and helped them obtain the required information and documents. Responsibilities also included

Proposed Labor Category

Project Lead (**Key Personnel**) – Task Area 10

Senior Grant Manager (**Key Personnel**) – Task Areas 2, 3, 4, 5, 8, and 15

Proposed Task Areas

- 2. Financial Compliance, Oversight, and Fraud Prevention
- 3. Duplication of Benefits (DOB) Compliance
- 4. Procurement Compliance and Monitoring
- 5. Claims, Appeals, and Case Reviews
- 8. Program Performance Monitoring and Evaluation
- 10. Audit Readiness and Monitoring Support
- 15. Grant Management

Education

- B.S., General Studies, Emphasis in Business Communications, Southeastern Louisiana University, Magna Cum Laude

Professional Affiliations

- Former member of NAMB (National Association of Mortgage Brokers) and LMLA (Louisiana Mortgage Lenders Association)



reviewing files and documents for validity and assisting outreach and management teams on various ad hoc client assignments.

EXPERIENCE

Manager (March 2021 – Current)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), Restore Louisiana Homeowner Assistance Program 2020 and 2024 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the RLHP 2020 and 2024 Program. This program was designed to help homeowners repair or rebuild their single-family homes that were damaged by 4 separate state disasters in 2020 and 2021.

- Continuous review of policy and client updates and communicating to team members.
- Create and update internal training documents and file review procedures; create internal monitoring checklist for results and daily reporting.
- Train and assist all eligibility team members and hold weekly team meetings to discuss any current updates, trends, or issues.
- Assign daily file reviews for Construction Monitoring and Eligibility QA/QC.
- Review any file issues that are sent for management review; includes confirming the validity of ownership, occupancy, income, insurance, property damage, etc.
- Weekly communication with the primary program contractor and/or client to refine policy understanding and execution.
- Assist the reporting and deliverable teams on gathering information for specific projects needed for the client.
- Research the primary contractors written procedures to ensure they align with program policy.
- Attend weekly client meetings as needed and report updates to all team leads.

Senior Consultant (March 2021 – April 2023)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), LaERAP and HAF Programs

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the Restore Program. This program was designed to help homeowners repair or rebuild their homes that were damaged by flood waters in March and/or August 2016.

- Review and understand all current policies and procedures for the program and check daily for any updates or changes.
- Daily QA/QC review of files that are potentially ready to move to closing.
- Review the validity of ownership, occupancy, income, insurance, property damage and other documents or information on file.
- Search and review outside sources to verify file information.
- Determine the integrity of assigned files and return and/or note if any changes are needed or if there are any eligibility issues.
- Review files in various stages for specific information or data requested by the client; including Ineligible, Zero Award and Withdrawn files.
- Research various areas of the program to determine if the primary contractors written procedures are being followed.



- Present to the Eligibility Team detailed procedures for specialized assignments.
- Assist management with invoice testing and reporting; including LBP and BCM billing.
- Attend weekly state management meetings and record, note and create minutes for management review.
- Periodically attend the contractor's (IEM) weekly operational meetings.
- Share relevant information from the state and contractor meetings in weekly internal team meetings.

Senior Consultant (March 2018 – April 2023)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), Restore Louisiana Program

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Created scripts to automate certain time-consuming data entry processes
- Created scripts to download and transform data used for reporting
- Created reports on the status of the program.

OTHER WORK EXPERIENCE

Employer: Hammerman & Gainer, LLC (HGI)

Analyst II (June 2009 – March 2018)

State of Louisiana, Office of Community Development, The Road Home Program-Homeowner Assistance

HGI was contracted by the State of Louisiana to continue the post catastrophe assistance to homeowners who were affected by Hurricanes Katrina and/or Rita. They were tasked with meeting the objectives of the client by providing solutions and procedures to improve work quality and reduce the time of delivery of federal grant funds that were intended to help homeowners repair or rebuild their homes after these hurricanes.

Worked with victims of Hurricane Katrina and Rita on daily basis to ensure they fully understood the design of the program, eligibility requirements and their responsibilities.

- Informed applicants of requirements and assisted them in obtaining specific documentation.
- Reviewed dated and current information and documents for validity; including appraisals, title abstracts, income and homeowners and flood insurance information and documents.
- Displayed and developed a sincere, respectful and professional relationship with each applicant.
- Maintained this important relationship by being accessible and knowledgeable about the status of their file and all new policies and procedures.
- Assisted management on many special projects to meet deadlines given by the client. This included reviewing old and new files and determining previous actions taken, actions needed and eligibility for new or changed policies to the program.
- Entered data into several software databases to ensure accurate reporting.
- Worked closely with other team managers and members to ensure current policies and procedures were understood and being followed.



- Assisted the outreach team by reviewing files and helping them communicate effectively with face-to-face applicant appointments in their respective local areas.
- Made final determinations on the eligibility of an applicant and/or property and dispositioned the file to a proper status.
- Referred files to Legal Assistance, Fraud, Appeals, Exceptions and/or other departments, when applicable.
- Reviewed compliance documents to determine if program compliance and covenants were met.
- Determined eligibility and offered Unmet Need solutions to those applicants who did not meet compliance.

Employer: ICF International Inc.

Underwriter II (February 2007 – May 2009)

State of Louisiana, Office of Community Development, The Road Home Program-Small Rental

In the aftermath of Hurricanes Katrina and Rita, ICF was contracted by the State of Louisiana to implement the state's Community Development Block Grant – Disaster Recovery program. Part of that program included financial incentives to assist rental property owners in repairing their single and multi-family properties damaged by these hurricanes. They were tasked with developing procedures to disburse these funds, which required an understanding of federal compliance protocols and policies.

- Assisted in developing and implementing procedures and policies for this new program.
- Analyzed data to determine award eligibility for specific applicants.

Educated and assisted applicants to ensure their understanding of the program guidelines and requirements.

- Reviewed all documents received for completeness and correctness.
- Assisted IT in testing and trouble-shooting issues with the newly developed software (Housing and Development Software –HDS).
- Trained new employees on file processing and goals of the program.
- Helped develop protocol for communicating and training participating lenders.
- Lead the Commitment Letter Team to meet client deadlines.
- Worked as a liaison between Underwriters, QAQC and Management to ensure every Commitment Letter was accurate.



Joseph “Joey” Gallo

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Joey Gallo is a seasoned Government Advisory professional with nearly 16 years of experience managing complex grants and compliance programs across HUD Community Development Block Grant – Disaster Recovery (CDBG-DR) and Mitigation (CDBG-MIT), FEMA, CARES Act, ARPA, IRA, and other federal programs. A Certified Emergency Manager (CEM) with certifications in Texas (TEM) and Louisiana (LEM-T), he is adept at guiding clients through stringent regulatory landscapes, developing Standard Operating Procedures (SOPs), and ensuring accountability through robust quality assurance frameworks.

Key qualifications include:

- **Leadership in Training & Development:** Extensive experience designing and directing training programs for large-scale federal grants, including developing Continuing Education Units (CEUs) and standardized training processes that enhance compliance and team productivity.
- **Process Improvement & Strategic Compliance:** Proven track record of implementing process improvements, performing second-level reviews for audit readiness, and mitigating compliance risks to ensure efficient, high-impact grant administration.
- **Client & Stakeholder Relations:** Skilled in maintaining transparent, high-integrity relationships with federal, state, and local government agencies, aligning client expectations with regulatory requirements, and achieving program success.

Joey also brings advanced skills in video production and training content creation, which enhance client learning and engagement, making complex regulatory content accessible.

EXPERIENCE

Senior Manager (June 2024 – May 2025) Louisiana Office of Community Development

CohnReznick supported the Louisiana Office of Community Development in administering HUD Community Development Block Grant – Disaster Recovery (CDBG-DR) and Mitigation (CDBG-MIT) programs. Joey contributed to program administration, compliance, and training efforts

Proposed Labor Category

Project Lead – Task 12 (Key Personnel)

Senior Grant Manager – Task Areas 1, 2, 4, 8, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
8. Program Performance Monitoring and Evaluation
12. Training, Technical Assistance, and Capacity Building
15. Grant Management

Education

- B.G.S., Bachelor of General Studies, Louisiana State University, Minors in Sociology, Communication Studies, & Audio-Visual Arts

Certifications

- Certified Emergency Manager (CEM)
- Certified Texas Emergency Manager (TEM)
- Certified Louisiana Emergency Manager – Technical (LEM-T)



by:

- Providing technical assistance to program managers on policy implementation and monitoring processes.
- Developing Standard Operating Procedures (SOPs) and reference guides to align subrecipient practices with HUD and state requirements.
- Designing and delivering compliance training to state staff, local governments, and subrecipients on procurement, financial management, housing rehabilitation, and environmental review.
- Creating plain-language instructional materials that increased subrecipient understanding of federal requirements, reducing audit findings and compliance risks.

Senior Manager (October 2022 – June 2024)

Texas Office of the Governor (OOG)

CohnReznick is the sole vendor to the Office of the Governor of Texas for providing federal grant oversight and monitoring services for funding received by the State of Texas. CohnReznick provides these services for the state's entire portfolio of programs and projects funded by the Infrastructure Investment and Jobs Act (IIJA), the American Rescue Plan Act (ARPA), the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and the Consolidated Appropriations Act of 2021 (CAA). CohnReznick delivers comprehensive grant administration services, including: monitoring financial and programmatic compliance with state and federal requirements, including alignment with HUD compliance frameworks, providing technical assistance to subrecipients and beneficiaries, validating project-level expenditures, reviewing and processing applications for federal assistance, advising on systems development, and leveraging programmatic data to mitigate against fraud, waste, and abuse.

- Verify applicants were negatively impacted by COVID-19;
- Provide initial eligibility determination of grant applications;
- Review allowability of submitted expenses;
- Evaluate reasonability of submitted expenses in proportion to the extent and type of harm experienced;
- Validate supporting documentation for submitted expenses;
- Identify missing required documentation;
- Assess applications for duplication of benefits;
- Issue document requests for missing documentation;
- Maintain audit history of missing documentation requests;
- Communicate with business owners to obtain required documentation and clarification;
- Analyze programmatic data in system of record for quality assurance;
- Evaluate applications for fraud indicators;
- Recommend final disposition of applications;
- Propose improvements to system-of-record for grant program;
- Recommend policy and procedure improvements;
- Drafted policy and procedure recommendations that strengthened program oversight and mirrored HUD monitoring standards.

Senior Manager (March 2021 – January 2022)

Texas Department of Housing & Community Affairs (TDHCA)

CohnReznick provides Application Eligibility Review services to TDHCA. Our team assists tenants and landlords who seek assistance for rent and/or utility arrears, or current and future months (up to 15 months total assistance). CohnReznick



performs reviews of applications through the entire review cycle, including: initial reviews; communicating with tenants, landlords, and utility providers; setting up draw requests; placing applications into final disposition; and processing first-level appeals.

- Training coordinator for all incoming prime and subcontractor staff of over 500 individuals
- Initial Reviews Manager directly managing a staff of 80 performing reviews of tens of thousands of citizen applications for Emergency Rent Relief (aligned with HUD housing stability objectives).

Regional Manager (April 2018 – March 2021)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Oversee, train and lead program staff in understanding and applying the regulations, policies, and procedures.
- Provides guidance and technical assistance to management and the client on policy and procedures to implement the disaster programs in an effective and efficient manner.
- Assesses client situations; identifies and interprets federal regulations and uses knowledge and experience to determine method of project implementation
- Provide guidance and project formulation support for FEMA and other federal grant assistance
- Support the Finance Section of an Emergency Operation Center (EOC)
- Maintain active communication with project management and clients to manage expectations, ensure satisfaction, make sure deadlines are met, and lead change efforts effectively
- Identify policy or program related compliance issues, and make recommendations and coordinate resolutions or improvements
- Manage, develop, train, and coach staff on projects and assess performance for engagement and year-end reviews.

OTHER PROJECT EXPERIENCE | GRANT THORNTON

Project Manager (January 2017 – April 2018)

State of Texas, Department of Public Safety, Division of Emergency Management (DPS/TDEM)

Grant Thornton, LLP was one of four Affiliates for the Texas Division of Emergency Management assisting with the administration of the FEMA Public Assistance and Hazard Mitigation programs in central and southern Texas. The project was cradle-to-grave with FEMA Project Worksheets from obligation to complete account closure. Compliance and grant monitoring were the key objectives.

- Project Manager for Grant Thornton, LLP Disaster Recovery Division
- Manage and supervised the execution of key areas of engagement for Texas managing the distribution of FEMA Public Assistance and Hazard Mitigation grant funding.
- Supervised an engagement team of Senior Associates and Associates.
- Reviewed key work papers and deliverables.
- Communicated and interacted with client personnel daily; communicated issues and status with audit partners.



- Performed engagement management responsibilities, including performance reviews, task delegation, project scheduling, project financials, quality review and client management.

Problem Resolution Officer II (December 2009 – January 2017)

State of Louisiana – Governor’s Office of Homeland Security & Emergency Preparedness (GOHSEP)

The State of Louisiana’s GOHSEP agency is responsible for administering FEMA programs throughout the State of Louisiana. Joey was involved exclusively with the Grants Management department within GOHSEP which performed compliance monitoring activities for subrecipients throughout the State.

- Subject matter expert in federal disaster recovery grants, providing guidance and oversight to ensure compliance with complex laws, rules, and regulations. Provide guidance, oversight, and general assistance to both the State as well as Public Assistance applicants in interpreting complex laws, rules, and regulations in order to minimize risk by assessing the financial integrity of FEMA payments to state applicants
- Perform complex grant, contract, and procurement reviews and advise both internal and external clients on best practices
- Public representative for the agency having given award-winning presentations, coordinating applicant education seminars, and speaking on behalf of the agency
- Recognized by the agency Director with an Outstanding Performance Award for the development of a full Grants Manager training program
- Promoted rapidly through a series of increasingly-responsible leadership positions based on strong performance in customer service, team leadership, and process improvement
- The first ever individual in Louisiana to be promoted to a Senior Disaster Recovery Specialist having passed the rigorous training and testing regiment
- Key player in the recovery of many of Louisiana’s most high-profile applicants having directly managed projects totaling in the billions including those from Recovery School District, Orleans Parish School Board, and more.
- Coordinated with local governments and school districts on rebuilding and housing recovery projects funded by federal disaster programs, experience directly transferable to HUD CDBG-DR/MIT efforts.



Brittany Kelly

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Kelly has over twelve years of project management experience, serving in roles focused on emergency management, program and grant management, contract management and business process improvement for federal, state, and local government agencies. She has worked on billion dollar federally funded programs throughout the state and local and not for profit levels to include states like California, Georgia, Hawaii, Florida, Iowa, Mississippi, South Carolina, and Texas, to include major disaster declarations across public health, hurricanes, floods, ice storms, and fires as well as FMAGs. Responsibilities range from program implementation and process management to grant compliance and closeout. Most recently serves as the Project Manager for City of Atlanta, Mississippi Delta Council for Farm Worker Opportunities, Inc. and Iowa’s Department of Homeland Security and Emergency Management supporting program management, financial oversight advisory, staff augmentation operations and process improvement.

EXPERIENCE

Senior Manager (December 2024 - Present)

Capital Good Fund

CohnReznick is providing advisory services for Capital Good Fund’s Solar for All program – the Georgia BRIGHT program. The Georgia BRIGHT program, part of the Solar for All initiative, aims to expand the benefits of solar energy to low-income and disadvantaged communities in Georgia. It includes components like BRIGHT Lease, Community Benefit Solar, and Utility-Led Community Solar, which provide various ways for households and organizations to access solar energy at reduced costs. The program aims to reach between 15,000 and 20,000 households and train up to 1,000 people in solar jobs over the next five years.

Leveraging our expertise in federal award compliance, administration, and oversight, we support the development of a robust and compliant program. Our tasks include analyzing existing infrastructure, stress-testing internal control strategies, developing systems for recordkeeping and documentation, and providing guidance on cost segregation and best

Proposed Labor Category

Project Lead – Task 12 (Key Personnel)

Senior Grant Manager – Task Areas 1, 2, 3, 4, 5, 7, 8, 9, 10, 12, 15, and 16

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
7. Needs Assessments, Market Analysis, and Geospatial Support
8. Program Performance Monitoring and Evaluation
9. Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management

Education

- M.H.R., Human Relations, University of Oklahoma
- B.S., Healthcare and Psychology, Neumann University

Certifications

- South Carolina Certified Emergency Manager (SC-CEM)
- Project Management Professional (PMP)

Clearances

- Public Trust
- Secret



practices for tracking expenditures. Additionally, we are advising on procurement practices, subrecipient and contractor monitoring, budgeting, and program evaluation to facilitate compliance with federal regulations and streamline workflows for financial management and reporting.

- Serving as the Project Manager, Brittany supports the implementation of the Solar for All Grant by providing a variety of finance/accounting and compliance monitoring services to the Capital Good Fund.
- Oversaw a Gap Analysis to help CGF meet EPA reporting requirements
- Working with CGF to update their systems to capture all relevant data.

Senior Manager (January 2025 – Present) **Greenville County, South Carolina**

In the aftermath of Hurricane Helene, Greenville County was devastated with significant impacts county wide to include over 1M cubic yards of vegetative debris. Greenville County hired CohnReznick to be their sole disaster recovery consultant to navigate the FEMA programs to include Public Assistance and Hazard Mitigation Grant Program. Areas of expertise provided has included debris management, grant management, and procurement recommendations.

- Serving as an SME, Brittany provides clear guidance on recommendations for eligibility and supports as a FEMA liaison on behalf of the County for the Public Assistance program process as well as any additional disaster recovery needs.
- Greenville County also faced in March 2025 the Table Rock Complex Fire, which has resulted in over 11,000 acres impacted. Brittany supported initial response for contract management and oversight, procurement guidance, and executive leadership technical expertise.

Senior Manager (October 2024 – Present) **Ebenezer Baptist Church, Atlanta, Georgia**

As a result of the American Rescue Plan Act, Ebenezer Baptist Church (EBC), in partnership with the Ebenezer Building Foundation (EBF), is managing a federally funded initiative aimed at the maintenance and improvement of a senior living facility—specifically, the Columbia Tower at MLK Village in Atlanta, Georgia. The project is supported by American Rescue Plan funds and is governed by federal grant compliance standards, particularly 2 CFR 200.

- Serving as the Project Manager, Brittany leads the development of the compliance framework to ensure the activities performed follow the code of federal regulations and program policies and procedures.

Senior Manager (September 2024 – Present) **Rockdale County, Georgia**

The Rockdale County project, supported by CohnReznick, focuses on providing comprehensive grant compliance and management services. This includes a thorough review of all Federal, State, and Local Grants, offering critical findings and recommendations to ensure compliance with relevant regulations and policies. The project also involves creating a detailed database listing all identified grants with summaries, website information, funder details, reporting requirements, and drawdown information. Additionally, CohnReznick recommended best practices for the Grant Division and project coordinators, identified eligible administrative costs that may be covered by the grant, and supported the CFO, Deputy CFO, and Grant Division employees with grant-related work.

- Serving as the Project Manager, Brittany leads the development of the compliance framework to ensure the activities performed follow the code of federal regulations and program policies and procedures.



Project Manager (October 2022 – Present)

City of Atlanta Department of Grants and Community Development

Serving as the Project Manager, Brittany supports the City with project management, completion of environmental reviews, financial and scope compliance, and oversight monitoring for projects funded under HUD's Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME), Housing Opportunities for Persons With AIDS (HOPWA) and Emergency Solutions (ESG) grant programs totaling over \$40M annually in grant funding.

- Performed complex technical assistance, and administration work to review, develop, coordinate, and draft operational guidance related to grant resources.
- Coordinate communication with various stakeholders with the City departments and Housing Authority.
- Developed grant administration approach, timeline, and processes in compliance with federal and program regulations for HUD's Healthy Homes grant.

Senior Manager (October 2022 – Present)

Camping Unlimited

CohnReznick serves as Camping Unlimited's expert advisors guiding them through the complex PA process. Camping Unlimited has over \$15 million dollars in grant funding. We are working to maximize grant payment received to ensure their facilities are not only restored but better than before. We advise them through project development, planning, procurement, and implementation. We coordinate with their A/E team to add additional funding for complying with consensus-based codes and standards (CBCS) and the additional of hazard mitigation plans (HMP). We work closely with their state and federal representatives to address any issues and to comply with all programmatic and statutory regulations. We serve as strong advocates by using our extensive policy knowledge to appeal multiple FEMA determination.

Because all of CU's projects are currently held up in the design phase for another year or so, we are still early on in CUs path to recovery and reimbursement. However, our early procurement guidance has been instrumental in CUs navigation of the FEMA PA program. Based on our guidance, CU developed a procurement policy that's aligned with federal regulations, and they now have a better understanding of procurement nuances. For example, CU originally wanted to "self-certify" a higher micro-purchase threshold before fully understanding what that entailed. Had they proceeded without our guidance, it's likely they would have awarded work to vendors that would result in questioned costs due to improper procurement methods.

Additionally, to maximize CUs reimbursement potential, we drafted a non-competitive procurement memo that ensured they were reimbursed for over \$100,000 in fees from their previous consultant, who was not originally procured within traditional procurement requirements.

- Serving as the Project Manager, Brittany leads the oversight of the Public Assistance program process as well as any additional disaster recovery needs.
- Supports detailed project review for errors and omissions to draft and submit project change requests, thorough cost documentation assessing and organizing as well as any required procurement reviews.

Project Manager (July 2023 – Present)

Mississippi Delta Council for Farm Worker Opportunities, Inc.

Serving as the Project Manager, Brittany supports the implementation of the USDA RFBC cooperative agreement by providing a variety of finance/accounting and compliance monitoring services to the Mississippi Delta Council for Farm



Worker Opportunities, Inc. (MDC).

This includes the development of financial procedures for MDC's implementation of the RFBC cooperative agreement, monthly compliance review of subrecipient and contractor payment requests, monthly reconciliation of MDC financial records, quarterly compliance reporting, and advisory services to MDC on the implications of policy/process decisions.

- Accounting Function Oversight: Oversee the organization's accounting function in relation to the federal grant, ensuring compliance with 2 CFR 200 regulations and maintaining an effective accounting process
- Compliance Monitoring: Conduct monthly compliance reviews of subrecipient and contractor payment requests to ensure adherence to regulatory requirements
- Financial Reconciliation: Perform monthly reconciliation of MDC financial records to maintain accurate financial data and support quarterly compliance reporting
- Reporting: Generate quarterly compliance reports and other necessary documentation to confirm regulatory compliance and inform stakeholders of financial status and activities.

Project Manager (October 2021 – Present)

Iowa Department of Homeland Security and Emergency Management (HSEMD)

CohnReznick serves as the prime contractor to Iowa Department of Homeland Security and Emergency Management (HSEMD) supporting disaster recovery through federal grant programs including FEMA PA, Individual Assistance (IA), and Hazard Mitigation (HM). Brittany has worked together with HSEMD leadership to evaluate its two monitoring plans and develop one unified plan to eliminate redundancy, ensure consistent process implementation, and incorporate enhancements to satisfy changes in federal regulation. Under her guidance, CohnReznick has also supported the recent transition from DUNS to UEI for federal subgrant reporting through outreach to subrecipients and the provision of direct technical assistance.

- Performed complex technical assistance, and administration work to review, develop, coordinate, and draft operational guidance related to grant resources.
- Provided staff augmentation and operational support for the annual GAAP Reporting data collection, outreach to over 300 subrecipient accounts, and verification of subrecipient reporting for HSEMD for FY23.

Subject Matter Expert (December 2021 – Present)

Housing and Urban Development (HUD)

Led by Du & Associates professionals with expertise in disaster recovery grant management, Ms. Kelly serves as the Subject Matter Expert (SME) for Federal Grant Administration and resources. Brittany is responsible for providing technical assistance and full review of the current disaster assistance guidance provided to Public Housing Authorities (PHAs) as the information is updated and streamlined with most recent law, regulation, policy and any applicable resources. Additionally, Brittany is developing and providing training nationwide to the Public Housing Authorities on the new and updated guidance approved and published by HUD.

- Performed complex technical assistance, and administration work to review, develop, coordinate, and draft disaster recovery guidance related to disaster resources.
- Develop and conduct trainings applicable and informative for Public Housing Authorities for all types of disaster types to include, wildfire, hurricane, flooding, tornadoes, winter storms and pandemics.
- Develop training materials to include presentations and fact sheets, provide public outreach, provide in person trainings and present in five national webinars.

**Subject Matter Expert (September 2023 – Present)****Deputy Project Manager (September 2020 – August 2023)****Texas Division of Emergency Management (TDEM)**

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Performed complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the State of Texas.
- Conducted subrecipient briefings and other outreach and training activities, ensure grant applications were received and processed properly, and monitored both the programmatic and financial aspects of awarded projects.
- Ensured deadlines were met, applications or other documentation were complete and correct before submission to federal authorities, monitoring activities were conducted in accordance with the project-worksheet guidelines, projects were completed within the approved scope of work, and payment requests were promptly and correctly processed.
- Reviewed progress reports, payment requests, and provided guidance and assistance to grant recipients on documentation requirements and resolution of project worksheet-related problems.
- Evaluated opportunities and requirements to assist local jurisdictions and state agencies in maximizing reimbursement potential.
- Ensured compliance with federal, state and local regulations and ordinances.
- Facilitated communications between sub-grantees, state and federal entities.
- Monitored compliance through regular technical assistance, quarterly status reviews, and ongoing monitoring of reimbursement requests.

Project Manager (August 2023 – June 2025)**City of Atlanta Mayor's Office of International and Immigrant Affairs**

Serving as the Project Manager, Brittany supports the City with project management, financial and scope compliance, and oversight monitoring for projects funded under FEMA's Emergency Food and Shelter Program- Humanitarian (EFSP-H) and Sheltering Support Program (SSP) totaling in over \$11M allocated in congressional appropriations.

- Performed complex technical assistance, and administration work to review, develop, coordinate, and draft operational guidance related to grant resources.
- Coordinate communication with various stakeholders with the City departments and nongovernmental organizations.
- Developed grant administration approach, timeline, and processes in compliance with federal and program regulations for EFSP-H and SSP.

Subject Matter Expert (July 2024 – December 2024)**Hawaii Emergency Management Agency**

Serving as the Subject Matter Expert, Brittany supports the oversight and audit of the sheltering costs related to the 2023 Maui Wildfire by providing a variety of finance/accounting and compliance monitoring services to HI-EMA.



This includes overseeing the review and compliance of invoices, ensuring adherence to federal regulations, and managing contracts with various vendors to verify compliance with FEMA NCS requirements and the accuracy of project expenditures. Additional roles include evaluating procurement processes, verifying insurance coverage, and ensuring proper documentation and record-keeping.

- Accounting Function Oversight: Oversee the organization's accounting function in relation to the federal grant, ensuring compliance with 2 CFR 200 regulations and maintaining an effective accounting process.
- Compliance Monitoring: Conduct compliance reviews of all costs and contractor payment requests to ensure adherence to regulatory requirements.

OTHER WORK EXPERIENCE

Public Assistance Program Manager/ Public Assistance Officer (March 2017 – September 2020) **South Carolina Emergency Management Division**

Developed procedures, methods, and guidelines to properly administer the Robert T. Stafford Disaster Relief and Emergency Assistance Act as it relates to Public Assistance (PA) programs. Supervised and lead staff members working ten different disaster operations. Coordinated closely with the Federal Emergency Management Agency (FEMA) to accomplish programmatic objectives. Assisted the State Coordinating Officer (SCO) and Governor's Authorized Representative (GAR) during Presidential disaster declarations, as requested, to coordinate the PA program.

- Responsible for the lifecycle of the Public Assistance grant process in ten Presidentially declared disasters across 46 counties.
- Responsible for the operations related to eligible reimbursement of over \$1B to subrecipient's throughout the state.
- Provided oversight of over 4,100 projects eligible for federal grant program.
- Presented informative briefings and trainings in 46 counties on program eligibility and requirements.
- Implemented, reimbursed, and closed the Fire Management Assistance Grant (FMAG) for South Carolina.
- Responsible for the implementation of the COVID-19 major disaster declaration, DR-4492, to include coordination with other state agencies to maximize resources related to the Coronavirus Relief Fund (CRF). South Carolina chose to utilize received CRF funds to offset the nonfederal share of the Public Assistance program.

Program Manager (February 2016 – March 2017) **Hearts & Hands Disaster Recovery**

Achieved organizational objectives by contributing information and recommendations to organization's vision. Directed all preparedness, response and recovery efforts on behalf of HHDR within the state of South Carolina. Focused on long-term recovery work to include case management. Developed and maintained relationships with county and local governments affected by disaster, and with state and national disaster partners to work toward a statewide successful recovery.

- Provided oversight in the case management of 5,600 residents in a Presidentially declared disaster.
- Directly and indirectly supervised 63 personnel within the organization.
- Assisted in the recovery efforts of four Community Development Block Grant (CDBG)-DR programs.
- Fostered and formalized relationships with organizations and government agencies to include state agencies, American Red Cross, United Way, Catholic Charities, and St. Bernard Project to provide engagement opportunities..



Social Services Coordinator (January 2014 – February 2016)
United States Army

Collaborated as a case manager within multidisciplinary teams to provide services to wounded, ill, and injured warriors and their families covering over 900,000 square kilometers in Europe. Coordinated resources for services and assistance to warriors and family members. Managed the implementation, coordination, monitoring and evaluation of options and services and events to address organization and client needs.

- Created and formalized relationships with organizations including American Red Cross, United Services Organizations, Army Community Services, and Wounded Warrior.
- Transitioned 453 soldiers out of the Army by providing educational and career counseling.
- Developed and provided oversight to 17 programs.

Field Office Coordinator (September 2012 – January 2014)
American Red Cross

Oversaw all Human Resource functions for Red Cross volunteer program, including personnel recruitment, in-processing, training coordination, manpower utilization, and annual performance evaluation management. Worked closely with Landstuhl Regional Medical Center's chain of command to directly implement Regional Health Command-Europe's strategic initiatives. Identified and initiated business development strategies and technology, instrumental in developing corporate partnerships and volunteer incentives.

- Saved over \$1.1M in fiscal year 2014 by managing over 500 volunteers who generated over 47K volunteer hours.
- Boosted Online Volunteer Management System usage 200% by leading strategic communications campaign that increased communication and efficiency for volunteer utilization.



Meghan Hicks

Director | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Hicks brings over 12 years of experience in federally funded grant programs. She assists governmental entities with complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded grant programs. She leads a team that provides technical assistance, support, project oversight, payment processing, resolution of complex project related issues, and development of processes and procedures for the State of North Carolina.

Ms. Hicks' qualifications and expertise include:

- Provides support to North Carolina for 12 federally funded disasters spanning more than \$3 billion in program costs.
- Leads the team supporting Hawaii Emergency Management Agency through reconciling two expedited Non-Congregate Sheltering projects for the Maui Fires
- Led a team that provided technical assistance, payment processing, and resolution of complex project related issues for 11 Texas disasters and over 400 sub recipients.
- Well-versed in compliance regulations and requirements for federally funded disaster recovery grant programs, including monitoring and reporting; payment reimbursements; procurement; scope of work change requests; and verifying mandatory insurance requirements.
- Subject Matter Expert in Hazard Mitigation Grant Program managing 42 sub recipients for Hurricane Ike and Hurricane Dolly; and
- Skilled in processing documentation for payment or recovery of PA grants as well as coordinating the FEMA PA process from project worksheet formulation through closeout.

EXPERIENCE

Program Manager (July 2020 - Present)

State of North Carolina, Department of Public Safety, Division of Emergency Management (NCEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the North Carolina Department of Public Safety, Division of Emergency Management

Proposed Labor Category

Project Lead – Task Areas 13 and 15 (Key Personnel)

Senior Grant Manager – Task Areas 1, 2, 4, 5, 8, 10, 12

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Technical and Engineering Support for Infrastructure and Housing Projects
13. Relocation Program (URA/TRA) Development and Compliance Support
15. Grant Management

Education

- B.A., English, Texas State University



for Grant Administration for Public Assistance and Individual Assistance programs. CohnReznick is responsible for establishing procedures, processes and systems to make grant administration efficient, effective, and compliant with federal requirements. Our team performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the State of North Carolina.

- Conduct outreach and training activities
- Develop and execute specific program guidance
- Ensure maximum participation from applicants in the state and federal disaster assistance programs
- Ensure compliance with federal, state, and local regulations
- Provide technical assistance for database administration
- Maintain relationships with federal, state, local, tribal, NGO, and private sector logistic stakeholders to collaborate recovery efforts
- Develop written guidance, fact sheets, and training materials for distribution
- Create Standard Operating Guidelines for Public Assistance
- Establish tracking of grant activity to include project milestones and cost reports
- Ensure timely administrative and fiscal process for grant awards
- Provide direct technical assistance and guidance to grant recipients on documentation requirements and resolution of project worksheet-related problems
- Maintain accounting of fiscal transactions, reports, and supporting documentation for each grant
- Provide direction and interpretation of governing laws, policies, regulations, and procedures
- Serve as a liaison to facilitate resolution to recovery-related issues
- Provide education and information as requested in the areas of recovery and compliance with state and federal policies and procedures for disaster-related services.

Recovery Manager (September 2013 – June 2020)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the state of Texas;
- Conducts applicant briefings and other outreach and training activities, ensures grant applications are received and processed properly, and monitors both the programmatic and financial aspects of awarded projects;
- Ensures deadlines are met, applications or other documentation are complete and correct prior to submission to federal authorities, monitoring activities are conducted in accordance with project-worksheet (PW) guidelines, projects are completed within the approved scope of work, and payment requests are promptly and correctly processed;
- Reviews progress reports, payment requests, and provides guidance and assistance to grant recipients on documentation requirements and resolution of PW-related issues;



- Performs budget-monitoring and project-site inspections, and documents progress and/or completion of projects, causes for delays in PW completion from established timelines, or deviations from the scope of work to ensure procurement and contracting compliance;
- Evaluates opportunities and requirements to assist local jurisdictions and state agencies in maximizing reimbursement potential;
- Ensures compliance with federal, state and local regulations and ordinances;
- Facilitates communications between sub-grantees, state and federal entities;
- Processes scope changes, time extensions and quarterly reports; and
- Monitors compliance through regular technical assistance, quarterly status reviews, and ongoing monitoring of reimbursement requests.



Candice Mahoney

Senior Grant Manager | Metric Consulting

BIOGRAPHY

Ms. Mahoney 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.

EXPERIENCE

Senior Grant Manager (07/2024 – Present) Louisiana Office of Community Development

- **City of West Monroe:** CDBG compliance and project implementation for LWI Round 2 drainage project.
- **Village of Clarence:** CDBG compliance and project implementation for LWI Round 2 drainage project.

Senior Grant Manager (01/2018 – 06/2024) HUD Entitlement, CDBG-DR, and Treasury Funds, City of Baton Rouge, Parish of East Baton Rouge

Developed policies and procedures for all aspects of entitlement programs and ensured program compliance with applicable grant requirements. Provided general technical assistance on all entitlement and disaster recovery programs.

Senior Grant Manager (05/2023 – 06/2024) CDBG-DR RCIP, CDBG-DR Funds, Calcasieu Parish

Assisted in preparing multiple project applications for RCIP funding.

Senior Grant Manager (01/2015 – 05/2024) Isaac and RCIP, CDBG-DR Funds, Plaquemines Parish

Administered all aspects of a Parish-wide housing rehabilitation program, including case management, community outreach, environmental reviews, requests for payments, implementation of policies and procedures, application and budget preparations, technical assistance and monitoring visits. Served as lead grant manager for the Parish’s Resilient Communities Infrastructure Program (RCIP) Recovery Proposal and project application process.

Proposed Labor Category

Senior Grant Manager – Task Areas 1, 2, 5, 8, 12, 13, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
12. Training, Technical Assistance, and Capacity Building
13. Relocation Program (URA/TRA) Development and Compliance Support
15. Grant Management
17. Environmental Review

Education

- M.H.A., Healthcare Administration, University of Houston at Clear Lake
- B.A., Political Science, Louisiana State University



Senior Grant Manager (07/2022 – 04/2024)

CDBG-DR Funds, City of Lake Charles

Prepared environmental assessments for infrastructure and public facility projects. Assisted in the development of the CDBG-DR Action Plan.

Senior Grant Manager (07/2023 – 03/2024)

LWI Program, CDBG-DR Funds, St. Charles Parish

Prepared Environmental Assessment for LWI drainage project.

Senior Grant Manager (06/2022 – 05/2024)

LLOP Program, CDBG-CV Funds, Tensas Parish

Prepared project application for Love Louisiana Outdoors Project. Prepared requests for payment, assisted in construction bid process, completed environmental review record, and provided technical assistance to the Parish.

Senior Grant Manager (06/2016 – 06/2020)

Gustav/Ike Projects, CDBG-DR Funds, City of Gretna, Louisiana

Developed policies and procedures for all aspects of the CDBG program. Assisted in contractor procurement process. Ensured cost reasonableness of change orders and contract amendments. Prepared final project completion and monitoring reports.

Senior Grant Manager (11/2015 – 04/2020)

Gustav/Ike Projects, CDBG-DR Funds, Jefferson Parish

Coordinated project schedules from environmental clearance through engineering and construction administration to ensure that critical path milestones were met on time, including labor compliance. Prepared monthly status reports and guided development and review of plans and specifications. Ensured cost reasonableness of change orders and contract amendments. Processed requests for payment and prepared final project completion and monitoring reports.

Senior Grant Manager (06/2009 – 12/2014)

CDBG, St. Tammany Parish Government

Served as CDBG Entitlement Administrator and liaison to HUD. Lead all program management efforts, developed policies and procedures, oversaw NOFA process, prepared environmental reviews, managed project budgets. Ensured compliance for CDBG and CDBG-DR funding for both HUD and LA OCD-DRU funded projects.



Brandon Kanatani

Senior Grant Manager | Metric Consulting

BIOGRAPHY

Mr. Brandon Kanatani 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.

EXPERIENCE

Grant Project Manager (04/2023 – 07/2025)

FEMA Public Assistance and Disaster Recovery Services; Paradise Irrigation District; Paradise, CA

Assist 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.

Project Manager (01/2023 – 05/2023)

St. Mary Parish Water and Sewer Commission #4 American Rescue Plan Act (ARPA) Grant Management; St. Mary Parish, LA

Provide Grant Management services to manage more than \$5M in ARPA allocation for drinking water improvements. Advised and consulted clients on U.S. Treasury guidelines in concert with Louisiana OCD.

Project Manager (01/2022 – 01/2023)

Statewide CDBG Programs; Florida Economic Opportunity; Various Locations, FL

Provided monitoring and QA/QC closeout file review for Community Development Block Grant Disaster Recovery (CDBG-DR) funded projects. Provided on-site monitoring for Hurricanes Hermine and Matthew CDBG-DR programs. Provided closeout file review for the Florida Housing Rebuild and Rehabilitation Program, verifying all program policies were followed

Proposed Labor Category

Senior Grant Manager – Tsk Areas 2, 5, 12, and 15

Proposed Task Areas

- 2. Financial Compliance, Oversight, and Fraud Prevention
- 5. Claims, Appeals, and Case Reviews
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- Construction Management, Louisiana State University
- Certificate of Infrastructure Disaster Management, TEEX

Certifications

- National Grants Management Association Member
- Army Corps of Engineers CQM
- IS-100 Introduction to Incident Command System
- IS-200 ICS for Single Resources and Initial Action Incidents
- IS-300 Intermediate ICS for Expanding Incidents
- IS-400 Advanced ICS for
- Command and General Staff Complex Incidents
- IS-700 National Incident Management System
- FL-603 Public Assistance Grants Program
- FL-608 Emergency Work Eligibility
- FL-609 Permanent Work Eligibility



inc. eligibility, duplication of benefits, environmental review and construction.

Project Manager (01/2022 – 09/2023)

Community Development Block Grant Mitigation Program, Baton Rouge, LA

Worked on multiple projects including, Grant Management consultation for Victoria County, TX American Rescue Plan \$17M allocation. Provided federal procurement SOP's and process review, and program adherence per U.S. Treasury guidelines. 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.

Project Manager/Business Analyst (2018 – 2019)

Restore Louisiana Program—CDBG-DR; Office of Community Development – Disaster Recovery Unit; Baton Rouge, LA

Maintained and 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.

Quality Control/Project/Construction Manager (2005 – 2010)

CDBG-DR Programs; Baton Rouge, LA

Served in multiple capacities, QC Manager and Project/Construction Manager with successful completion of multiple \$1B+ projects: Hurricane Katrina Blue Roof (Slidell and Lake Charles), Hurricane Katrina Haul and Install (New Orleans and Baton Rouge), Road Home CDBG Program (South Louisiana), Texas Homeowner Assistance Program (Hurricane Rita CDBG Southeast Texas), and Small Rental Property Program (Hurricane Katrina CDBG). As QC Manager, successfully completed two U.S. Forestry Service Ranger Stations (Lincoln National Forest, NM and Prescott National Forest, AZ).



Brent Puckett

Senior Grant Consultant | Metric Consulting

BIOGRAPHY

Mr. Puckett is an experienced professional with extensive expertise and education in construction techniques, code compliance, construction oversight, and CDBG-DR damage assessments. Since 2018, Mr. Puckett 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 ensure consistent, quality products. Mr. Puckett is a creative problem solver who can rapidly adapt to a continuously evolving program.

EXPERIENCE

Program Manager (11/2022 – Present)

Restore Louisiana Program (CDBG-DR), State of Louisiana, Office of Community Development, Baton Rouge, Louisiana

Mr. Puckett serves as Project Manager for the quality control team supporting the Restore Louisiana Program, which was established to assist residents impacted by the historic 2016 floods, the 2020 hurricanes, and Hurricane Ida. Through the program's \$4.3 billion CDBG-DR allocation, the State of Louisiana has provided recovery assistance to more than 91,000 households. The program focuses on home repairs and remediation of safety concerns, including lead-based paint, asbestos, and structural deficiencies. Mr. Puckett leads a team responsible for ensuring that all damage assessments are both cost-effective and compliant with green building standards and local code requirements. He monitors team productivity to ensure timely delivery of program milestones and provides recommendations to enhance program efficiency through updates to policies and standard operating procedures. Mr. Puckett evaluates the condition of each home to determine whether rehabilitation or full reconstruction is the most feasible option and approves demolition and rebuilds when structures are beyond repair. He also serves as the primary liaison between contractors, parish officials, and the client, facilitating communication regarding policy changes, recurring issues, and file disapprovals. In addition, he ensures scopes of work are tailored to meet both municipal requirements and overall program standards, and he

Proposed Labor Category

Senior Grant Manager – Task Areas 2, 5, and 12

Proposed Task Areas

- 2. Financial Compliance, Oversight, and Fraud Prevention
- 5. Claims, Appeals, and Case Reviews
- 12. Training, Technical Assistance, and Capacity Building

Education

- B.S., Petroleum Engineering, Louisiana State University

Certifications

- Xactimate 28 Certification Level 1



exercises leadership in resolving unique or complex cases that fall outside the bounds of existing policy.

Quality Control Monitor (01/2018 – 11/2022)**Restore Louisiana Program (CDBG-DR), State of Louisiana, Office of Community Development, Baton Rouge, Louisiana**

Mr. Puckett played a critical role in improving the damage assessment process and ensuring compliance with FEMA guidelines for disaster recovery housing programs. He was responsible for reviewing damage assessments, appeals, change orders, pre-construction documents, and reconstruction estimates to verify accuracy and eligibility. Mr. Puckett monitored assessor's activity to ensure adherence to established Standard Operating Procedures and created weekly field monitoring reports to track progress and identify issues.

He conducted final inspections to confirm that completed work met municipal code requirements and processed documentation necessary for disbursing funds to contractors. When work was incomplete or required revision, he created change orders to update estimates, including the removal or addition of scope items such as structural components based on engineering reports. Mr. Puckett conducted onsite inspections to verify structural repairs were completed to program standards and reviewed flood elevation certificates to confirm compliance with FEMA elevation requirements. In cases where properties were deemed condemned or substantially damaged, he converted rehabilitation estimates into reconstruction estimates and developed new estimates using Xactimate based on architectural blueprints. Additionally, he performed special inspections to assess contractor performance, addressed applicant grievances regarding workmanship, and created detailed reports to document warranty claims and substandard repairs.

PRIOR EXPERIENCE**Insurance Claims Adjuster (10/2017 – 12/2017)****State Farm, Orlando, Florida**

Mr. Puckett supported post-Hurricane Irma recovery efforts in the Orlando area by processing residential insurance claims and conducting on-site damage inspections. He scheduled and performed home assessments, verified inspection data, and reviewed prior claim history to confirm that identified damages were storm-related and not pre-existing. He documented each inspection by uploading photographs and field notes into the claims database and utilized Xactimate to draft dwelling layouts and sketch roof damage based on observed wind impacts. He determined settlements in compliance with company policies and communicated estimates directly to homeowners, ensuring transparency and clarity throughout the claims process.

Marketing/Property Maintenance**Puckett Team Real Estate Partners LLC, Slidell, Louisiana**

Handle property maintenance of 13 rentals as well as homes listed for sale. Managed the remodeling process of various homes and home maintenance on rentals. Contacted past as well as potential clients through email, mail, and telephone to earn their business. In charge of search engine optimization, website updating, collaborating, and developing ads to promote business.



Shih-Hsien Yang

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Mr. Yang is a Senior Data Science Manager with over a decade of experience delivering advanced analytics and machine learning solutions for government programs, with a strong focus on HUD-funded initiatives, including Community Development Block Grant Disaster Recovery (CDBG-DR) and Mitigation (CDBG-MIT) programs. Proven track record in supporting disaster recovery, grant management, compliance, housing rehabilitation, and infrastructure efforts through data-driven strategies.

At CohnReznick, lead teams in developing and deploying fraud detection and duplicate detection models to safeguard federally funded programs from fraud, waste, and abuse. Provide software evaluation and support services for the Louisiana Office of Community Development (OCD), including process optimization, reporting and analytics. Expertise includes data standardization, address normalization using USPS Address Validation API, geospatial analysis, and data linkage across multiple systems such as LA IGX, LA Finance Reports, and HUD’s DRGR reporting platform to ensure consistency, accuracy, and compliance. Delivered dashboards and reporting solutions to enhance transparency for large-scale recovery programs such as LA Restore Hurricane Francine.

EXPERIENCE

Data Science Senior Manager (September 2025 - Present) Financial Impact Analysis of City Incorporation in DeKalb County, Georgia Using GIS Tools

CohnReznick is currently conducting an independent fiscal impact analysis for DeKalb County to assess the financial implications of proposed municipal incorporations. The project focuses on validating projected tax revenue losses, estimating savings from reduced County services, and identifying potential new revenue streams such as franchise fees. Using County-provided financial and geographic data, CohnReznick is performing geospatial analysis with tools like GeoPandas to accurately allocate impacts by area. The outcome will be a comprehensive, evidence-based report that equips County leadership with actionable insights for policy and budget decisions.

Proposed Labor Category

Senior Grant Manager – Task Area 7

Proposed Task Areas

- 7. Needs Assessments, Market Analysis, and Geospatial Support

Education

- M.S. Statistics, Rutgers University
- B.S. Mathematics, National Central University, Taiwan



- Analyze detailed tax revenue data for proposed incorporation areas to validate projected revenue losses.
- Quantify reductions in County expenditures for services such as police, fire, and sanitation that will no longer be provided.
- Estimate potential new revenue streams, including franchise fees and intergovernmental transfers associated with incorporation.
- Integrate revenue losses, cost savings, and new revenues into a dynamic fiscal model to determine the overall net financial impact.
- Perform geospatial analysis using GIS data and GeoPandas to map proposed city boundaries and accurately allocate financial impacts by parcel or population.
- Prepare a clear, actionable report summarizing the methodology, key findings, and strategic considerations for County leadership.

Data Science Senior Manager (August 2024 - Present)

Louisiana Office of Community Development – IGX Reporting

CohnReznick provides comprehensive Software Evaluation and Support Services for the Economic Development and Infrastructure (ED&I) Program team within the Office of Community Development's Disaster Recovery Unit. Funded by HUD's Community Development Block Grant Disaster Recovery Program (CDBG-DR), these services support the state's long-term recovery efforts.

As part of reporting and analytics, CohnReznick ensures system data aligns with desired dashboards and reporting requirements. This includes establishing a data dictionary, cleaning and standardizing existing data, and preparing scheduled reports for the Office of Community Development. Additionally, the team drafts system operational and reporting requirements to enhance data integrity and usability.

- Translated client-facing mockup reports into actionable analytics by mapping source data, applying calculations, and building aggregations to deliver accurate and meaningful reports for stakeholders.
- Linked data across IGX, Finance Reports, and DRGR systems without unique identifiers by applying the sorted neighborhood algorithm, ensuring integrated and consistent reporting.
- Built an automated email notification system to identify and flag data mismatches across systems, improving data consistency and integrity across LA OCD departments.

Data Science Senior Manager (August 2024 - Present)

Louisiana Office of Community Development – Restore Louisiana Homeowner Assistance

CohnReznick supports the Restore Louisiana Homeowner Assistance Program, administered by the Office of Community Development – Disaster Recovery Unit (OCD/DRU), by providing comprehensive Quality Assurance and Quality Control (QA/QC) services. Funded through HUD's Community Development Block Grant Disaster Recovery (CDBG-DR) Program, Restore Louisiana aims to assist the state in long-term disaster recovery. CohnReznick's scope of work includes program monitoring, IT systems reporting and oversight, eligibility and award review, business process optimization, and construction monitoring.

- Standardized and Enriched Address Data to Improve Cross-Agency Matching: Built a Python-based solution leveraging GeoPandas and the USPS Address Validation API to normalize partial addresses and append missing city and ZIP details, enabling accurate geospatial analysis. This significantly improved matching with FEMA, SBA, and NFIP datasets, ensuring reliable program estimates and strengthening the foundation for Louisiana's new housing recovery program.



Data Science Senior Manager (August 2024 – Present)

Port Authority of New York and New Jersey

CohnReznick was engaged by the Office of the Inspector General of the Port Authority of New York and New Jersey to jointly serve as Integrity Oversight Monitors on the \$13 billion John F. Kennedy International Airport Redevelopment program. As part of this engagement, CohnReznick works side-by-side with construction, maintenance, engineering, and environmental teams to provide compliance oversight in real-time to resolve problems while they are small, before they become large and cause headlines or delays. This includes creating, implementing, and monitoring policies and procedures that will help ensure that the entities engaged in the program comply with relevant laws and regulations.

- Supports compliance monitoring of DBRA requirements through the utilization of data analytics.
- Leads a team of data scientists to develop a dashboard reporting. This dashboard consolidates data from multiple sources, including Certified Payroll Reports, Contractor Time-in/Time-out systems, and onsite field investigation findings.
- Leverages Document AI to extract relevant information from Certified Payroll Reports (WH-347) submitted by subcontractors in unstructured formats such as PDF documents and convert the data into a structured and easy-to-use format.
- Utilizes data linkage techniques to integrate data from these various sources, despite the absence of unique identifiers across the different systems, enabling compliance monitoring experts to identify and prevent fraud, waste, and abuse.

Data Science Senior Manager (April 2021 – Present)

Texas Department of Housing and Community Affairs (TDHCA), Office of the Texas Governor

Develop AI/ML solutions to combat fraud, waste, and abuse for various federally funded state-administered programs.

Lead a data scientist team on various projects involving document fraud detection using Computer Vision and Large Language Models. Our document fraud detection model helped TDHCA Home Assistance Program (HAF) identify a loan servicer fraud ring with \$5 million in assistance.

- Develop machine learning (ML) algorithms that detect fraudulent assistance applications for public benefits using stolen/synthetic identities.

Utilize a lightweight, but scalable, in-house algorithm to detect duplicate entries/applications that may potentially lead to overpayments or fraudulent benefits. Over 14,000 households previously reported as separate households by the implementation vendor were identified with this algorithm for TDHCA HAF.

- Investigate potential fraud rings using data science and present the findings to management and stakeholders for data-driven decision-making.

Senior Data Scientist (March 2015 – November 2019)

Office of Anti-Fraud Programs at Social Security Administration [Booz-Hamilton]

Implement ML algorithms for identity theft detection on a contract with the Office of Anti-Fraud Programs at the Social Security Administration (SSA) and U.S. Department of Veteran Affairs (VA).

- Generated cost avoidance that exceeded \$200 Million annually;
- Protected \$2.4 million for fiscal year 2019 by building and deploying ML-based fraud detection models on an anti-fraud and data quality contract with the VA;
- Condensed entity datasets that contained duplicate entries by 35% on average using lightweight ML algorithms. This model serves as the first step of the investigation on potential collusions among judges, medical providers, and



attorneys during a benefit claim process at SSA. A similar entity resolution model was implemented to resolve duplicate benefit awards for the VA;

- Led creation of a neural network-based signature verification prototype to detect signature forgery associated with paper form applications for benefits to expedite paper form application review process and minimize the need for manual inspection;
- Built ML models on terabytes of data collected from consumer's online activities, which were used to predict whether a consumer will click the offer/ad based on the consumer profiles and the historical information that was extracted from email/web activities.



Katrell Starks

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Starks has more than ten years of experience in federally funded disaster recovery programs, specializing in Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Hazard Mitigation Grant Program (HMGP) administration, project management, consulting service, and compliance. Her expertise includes compliance and monitoring; disaster recovery; policy and procedure development and documentation. Ms. Starks:

- Provides disaster recovery support to states with federally funded disaster recovery programs with a focus on Community Development Block Grant (CDBG) and Hazard Mitigation Grant programs clients such as the State of Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP); Louisiana Office of Community Development, Disaster Recovery Unit (OCD/DRU); Louisiana Housing Corporation (LHC); New York Governor's Office of Storm Recovery (GOSR); the Texas Department of Emergency Management (TDEM); and the Texas General Land Office (GLO).
- Provides operational support for Hazard Mitigation Grant Program (HMGP) grant applicants and sub-grantees;
- Reviews, evaluates and provides analysis to management on applications for CDBG-DR funding.
- Performs cost benefit analyses in accordance with federal regulations;
- Develops training materials, assisting with facilitating and conducting trainings, providing technical assistance for compliance and program staff, and updating standard operating procedures.

EXPERIENCE

Project Associate (December 2023 – Present)

State of Louisiana Office of Community Development Disaster Recovery Unit (OCD/DRU)—Staff Augmentation/Compliance and Monitoring

CohnReznick professionals developed and implemented compliance and monitoring plans for more than \$14 billion of Community Development Block Grant (CDBG)-funded programs including compliance monitoring and contractor monitoring plans for the March and August 2016 Floods and has now expanded to include homeowners impacted by Hurricanes Laura,

Proposed Labor Category

Grant Manager – Task Areas 1, 2, 3, 4, 5, 8, 10, 12, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management

Education

- B.G.S., University of Louisiana at Lafayette



Delta, Ida and the May 2021 Severe Storm CDBG Disaster Recovery Programs.

- Perform quality control review for eligibility, verification of benefits (VOB) and award calculation.
- Complete supplemental testing on the daily batch and batch processing on the non-sampled-based daily batch zero grant award in eGrants.
- Initiate and perform monitoring reviews of specific process areas including eligibility and construction.

Senior Consultant (October 2019 – September 2023)

Texas General Land Office

The U.S. Department of Housing and Urban Development (HUD) appropriated over \$5 billion in Community Development Block Grant-Disaster Recovery (CDBG-DR) funding to the Texas General Land Office (GLO), of which, the City of Houston received over \$1.1 billion for development and implementation of The Harvey Homeowner Assistance Program (HoAP) to assist residents impacted by Hurricane Harvey.

- Reviewed draw requests and applications for acquisition, reimbursement, homeowner/city-managed rehabilitation & reconstruction.
- Determined eligibility for zero interest, forgivable loans by evaluating ownership, residency, income, child support, mortgage, disability, insurance, damage assessment, duplication of benefits (DOB), Geographic Information System (GIS) mapping and National Objective documentation.
- Identified missing, incomplete, inconsistent or personally identifiable information (PII) to draft Request for Information (RFI), Conditional Approval, Notice to Proceed (NTP) and Approval letters.

Compliance Monitor (September 2020 – December 2023)

Massachusetts Emergency Management Agency

CohnReznick performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the Commonwealth of Massachusetts for COVID-19. Our team is responsible for applicant outreach, training, technical assistance, and performing project reviews. During this engagement, we have also developed a grant management system solution utilizing Commonwealth's SharePoint platform.

- Provided direct technical assistance and eligibility support to applicants submitting claims;
- Expedited the collection, inventory, classification and organization of relevant financial documents;
- Reviewed existing procurements and contracts to ensure regulatory compliance and vendor satisfaction of terms;
- Aligned/grouped all expenses and contracts to specific eligible Category B activities authorized under COVID-19;
- Identified expenses and activities that may need further documentation or justification to validate eligibility;
- Coordinated with appropriate stakeholders to obtain necessary eligibility documentation or justification;
- Ensure compliance with federal, state and local regulations.

Project Associate (May 2017 – November 2019)

State of Louisiana Office of Community Development Disaster Recovery Unit (OCD/DRU)—Staff Augmentation/Compliance and Monitoring

CohnReznick professionals developed and implemented compliance and monitoring plans for more than \$13 billion of Community Development Block Grant (CDBG)-funded programs including compliance monitoring and contractor monitoring plans for the Gustav/Ike Parish Implemented Program and 13 of the State's Katrina/Rita CDBG Disaster Recovery Programs.



- Performed quality control review for eligibility, verification of benefits (VOB) and award calculation.
- Completed supplemental testing on the daily batch and batch processing on the non-sampled-based daily batch zero grant award in eGrants.
- Initiated and performed monitoring reviews of specific process areas including eligibility and construction.

Recovery Officer (March 2016 – May 2017)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Performed grant coordination, financial and programmatic compliance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the State of Texas;
- Ensured deadlines are met, applications or other documentation are complete and correct before submission to federal authorities, monitoring activities are conducted in accordance with the project guidelines, and payment requests are promptly and correctly processed; and
- Performed budget monitoring and project site inspections, and document progress and/or completion of projects, causes for delays in project completion from established timelines, or deviations from the scope of work to ensure procurement and contracting compliance.

Eligibility Analyst (August 2015 – January 2016)

New York Governor's Office of Storm Recovery (GOSR)

CohnReznick disaster recovery experts assisted GOSR in administering the Infrastructure Public Assistance CDBG Match program, which assists local governments and municipalities in recovery efforts using government funds. The team reviewed FEMA-eligible Project Worksheets to determine if project costs were eligible to be reimbursed for the non-federal share with U.S. Department of Housing and Urban Development (HUD)-CDBG funding. Review included an evaluation of eligibility funding—per the scope of work—environmental clearance, procurement, financial/cost management, insurance/duplication of benefits, labor compliance, Section 3, and Civil Rights.

- Reviewed Project Worksheets and reconciled documentation to determine if project costs were eligible to be reimbursed for non-federal share with HUD CDBG funding.

Business Analyst (April 2013 – December 2013)

State of Louisiana Office of Community Development Disaster Recovery Unit (OCD/DRU)—Staff Augmentation/Compliance and Monitoring

CohnReznick professionals developed and implemented compliance and monitoring plans for more than \$13 billion of Community Development Block Grant (CDBG)-funded programs including compliance monitoring and contractor monitoring plans for the Gustav/Ike Parish Implemented Program and 13 of the State's Katrina/Rita CDBG Disaster Recovery Programs.

- Developed and implemented compliance and monitoring plans and checklists for Community Development Block Grant (CDBG) funded programs;
- Created and maintained internal procedures for monitoring staff; and



- Supported OCD/DRU's monitoring efforts by providing technical assistance and training.



Makayla Conroy

Manager | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Conroy has over three years of experience in finance, collaborating with banks and large public pension funds while ensuring compliance with government-issued investment and operational standards. Ms. Conroy has worked in consulting since 2021, providing grants management, underwriting, project management, and advisory services for HUD-funded initiatives.

EXPERIENCE

Manager (May 2025 – Present) Flint Housing Commission

CohnReznick is engaged with Flint Housing Commission (FHC) to provide essential professional services aimed at enhancing compliance and operational efficiency. The scope of work includes three key areas: Fee Accounting, HUD Public and Indian Housing Information Center (PIC) data cleanup, and assistance with late Housing Choice Voucher (HCV) recertifications.

- Ensure compliance with HUD financial regulations and reporting requirements as well as offer guidance on compliance best practices for financial management and audit readiness;
- Design and implement optimized policies and procedures for correcting tenant file errors and reconciling them in HUD’s Secure Systems;
- Develop efficient methods for application intake, eligibility review, and HUD reporting;
- Train FHC staff in best practices for timely, accurate, and compliant tenant processing;
- Create staff training materials for case reviews, escalation procedures, and decision-making workflows; and
- Conduct compliance and oversight monitoring; and
- Track program timelines, financial milestones, and overall progress of PIC cleanup and late HCV recertification reconciliation.

Proposed Labor Category

Grant Manager – Task Areas 1, 2, 4, 5, 10, 12, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management

Education

- B.A., International Studies with a concentration in Global Political Economy, University of Denver



Senior Consultant (July 2024 – Present)

State of Connecticut Department of Housing

CohnReznick is engaged with the Connecticut Department of Housing (DOH) to assist in the drafting of and preparation for the issuance of two Requests for Proposals seeking contractors for its Housing Choice Voucher and Rental Assistance Payment programs, creating policies and procedures governing DOH's QC/oversight and monitoring of its Section 8 HCV and RAP programs, and providing technical assistance with transition support and DOH staff training.

- Assisting in the drafting of and preparation for the issuance of two Requests for Proposals in accordance with federal and state procurement requirements;
- Developing policies and procedures governing DOH's supervision, quality control, oversight, and monitoring of its Section 8 HCV and RAP programs, and concerning compliance with all relevant federal and state laws, regulations, and policies; and
- Providing training, education, and instructional resources for new and existing DOH staff administering the oversight and management duties of the Section 8 HCV and RAP programs.

Senior Consultant (January 2023 – Present)

Delaware State Housing Authority

CohnReznick is engaged to provide Project Management, Accounting & Compliance Reporting for DSHA's State and Local Fiscal Recovery Funds (SLFRF) Program, funded under the American Rescue Plan Act (ARPA). This \$60 million program incorporates several sub-programs to address the critical affordable housing needs throughout the State of Delaware. The Catalyst Fund is designed to redevelop blighted areas unable to be redeveloped by traditional market forces. The Accelerator and Preservation Fund are separate approaches to stabilize and increase the number of affordable housing units throughout the state. Finally, the Market Pressure Relief program seeks to address the rapidly evolving market and economic conditions to ensure that ongoing affordable housing LIHTC developments continue their sustainability.

- Develop standard operating procedures, applicant notification templates, workpapers, including underwriting tools for single family and multifamily housing construction, repair, and rehabilitation;
- Design subsidy grant underwriting and QA/QC processes;
- Underwrite SLFRF and LIHTC applications and complete eligibility determinations;
- Track program timelines, financial milestones, and overall progress of individual developments;
- Research Treasury guidance in order to provide strategic advice and policy recommendations;
- Conduct compliance monitoring, reporting functions, and records management.

Senior Consultant (October 2022 – June 2024)

Texas General Land Office (GLO)

CohnReznick was engaged with the GLO to provide application underwriting services to facilitate CDBG-DR housing activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$450 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

- Assessed applicant's ability to construct and operate multi-family housing utilizing CDBG-DR funds;
- Analyzed the financial feasibility of proposed developments;
- Underwrote the allowability and cost reasonableness of all hard construction costs, associated soft costs, and development fees;



- Analyzed gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment; and
- Provided guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.

Consultant (May 2021 – December 2021)

State of Connecticut Department of Housing

CohnReznick provided Program Management and Eligibility Determination services for the CT DOH's Emergency Rental Assistance Program – UniteCT.

- Performed secondary eligibility determination reviews in accordance with Treasury and Program guidelines and ensured all relevant documentation was provided;
- Underwrote and approved funding amounts for cases eligible for rental assistance;
- Assisted in the review and drafting of Standard Operating Procedures;
- Team lead for policy reconciliation and application recertification processes.



Erin White

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Erin is a Senior with 6+ years of experience in program and grant management, compliance, and auditing. Erin has vast experience supporting grant administration and implementation including federal programs from Housing and Urban Development (HUD), Federal Emergency Management Agency (FEMA), U.S. Department of the Treasury, and other state funding sources. In her prior position with the State of Florida Division of Emergency Management (FDEM), Erin led program implementation of Florida's Coronavirus State and Local Fiscal Recovery Fund (CSLFRF) program, which administered \$1.4 billion in federal award to 335 cities, towns, and townships. Erin also administered other statewide COVID-19 economic relief programs, including the Coronavirus Relief Fund (CRF), which aided 55 counties across the State of Florida.

Erin has ample experience in terms monitoring federal grant programs, to include interpreting and employing state and federal grant program requirements, complying with audit requirements and reporting requirements, and providing financial compliance support services.

EXPERIENCE

Assistant Project Manager (June 2022 to Present) **Florida Department of Commerce (FloridaCommerce)**

CohnReznick performs compliance monitoring for \$1.3 billion in funding for both the Community Development Block Grant-Mitigation (CDBG-MIT) and Disaster Recovery (CDBG-DR) for Hurricane Michael programs. Programs included in this funding include housing, workforce development, HMGP match, hometown revitalization, planning, general infrastructure, and critical facility hardening. Our team conducts risk assessments, performs onsite and desk compliance monitoring, and provides technical assistance to the state's 120+ subrecipients to strengthen compliance with programmatic guidance and federal and state statutes. Erin performs internal controls assessments, program expenditure and labor standards testing, and provides key stakeholders with consistent reporting on monitoring progress.

Proposed Labor Category

Junior Grant Manager – Task Areas 1, 2, 3, 4, 5, 9, 10, 12, and 15

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
9. Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management

Education

- B.S., Accounting, Florida State University

**Compliance Review Specialist (July 2024 to August 2025)****Massachusetts Emergency Management Agency (MEMA)**

CohnReznick performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the Commonwealth of Massachusetts for the COVID-19 event. Our team is responsible for applicant outreach, training, technical assistance, and performing project reviews. Erin conducts fiscal and programmatic compliance reviews of pre-obligated subrecipient projects in accordance with the FEMA Public Assistance (PA) program guidance.

Monitoring/Closeout Specialist (June 2022 to May 2024)**Bright Horizons, Family Solutions LLC – Centralized Funding Administration Process**

CohnReznick provided consulting services to Bright Horizons, one of the largest for-profit childcare providers in the world, seeking federal funding for various costs, such as loss of revenue, incurred as a direct result of the COVID-19 pandemic. The team assisted Bright Horizons in identifying, applying for, and reconciling federal and state funding received across over 500 childcare centers in over 30 states. Our professionals were also responsible for creating and maintaining standard operating procedures that document internal controls against fraud, waste, and abuse. In conjunction with Bright Horizon's staff, our team secured over \$225M in grant funding to support the preservation of childcare across the country. Erin performed reviews of all project workflows, identified and corrected discrepancies within the system of record, and created state-specific memos to memorialize discrepancies/nuances found within the grant program.

Senior Consultant (January to September 2022)**Florida Department of Children and Families (DCF)**

Led by CohnReznick professionals with expertise in federal grant management and compliance monitoring, CohnReznick was selected to conduct financial and programmatic monitoring of the Emergency Solutions Grant – CV (ESG-CV). DCF received an allocation of \$85 million in ESG funds, as authorized by the CARES Act, to provide emergency services to individuals and families who are homeless or facing homelessness. CohnReznick was responsible for establishing a monitoring plan, providing programmatic monitoring and auditing tools, expenditure tracking, centralized data and reporting, conducting site visits, and reviewing and improving procedures. Erin assisted a team of consultants providing technical assistance, subgrantee compliance monitoring, and program analysis services for the HUD ESG-CV for the State of Florida. She reviewed and assisted with subgrantee award documentation, internal policies and procedures, and procurement documentation to ensure compliance with applicable state and federal regulations.

Senior Consultant (January 2022 to March 2024)**New Jersey Department of Corrections (NJ DOC)****New Jersey Department of Health (NJ DOH)****New Jersey Department of Education (NJ DOE)**

CohnReznick performed integrity monitoring services, a critical part of New Jersey's accountability infrastructure, while working with multiple New Jersey state agencies in developing measures to prevent, detect, and remediate inefficiency and malfeasance in the expenditure of COVID-19 Recovery Funds and Programs. Our team was responsible for performing these services for various programs developed to alleviate the impact of the COVID-19 emergency declaration. Erin performed sampling transactions, prepared quarterly reports and risk assessments, and assisted in finalizing deliverables.



Recovery Finance and Administration Manager (December 2018 - November 2021)
Florida Division of Emergency Management (FDEM)

- Worked collaboratively with the State of Florida's Governor's Office of Policy and Budget to establish and facilitate Florida's Local Fiscal Recovery Fund (LFRF) program application, funding agreement, and funding guidance.
- Reviewed local government's LFRF program plans and advised recipients on program eligibility to ensure compliance with US Treasury guidance and other applicable federal grant regulations.
- Disbursed \$700M in LFRF funding to local governments within the first 90 days of receipt.
- Liaised with local officials to communicate local fiscal recovery priorities to state and federal officials.
- Complied CSLFRF distribution and project reports for submission to US Department of the Treasury.
- Supervised staff augmented consultants tasked with COVID-19 economic relief program administration.



Kristin Plews

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Kristin is a Senior at CohnReznick with more than 4 years of experience in project management relating to compliance and monitoring of Federal funding – including ARPA, CDBG-MIT, and CDBG-DR programs. She is part of the Government and Public Sector advisory team.

EXPERIENCE

Senior Consultant (January 2025 to Present) NJ HMFA

CohnReznick provides monitoring and compliance services to the New Jersey Housing and Mortgage Finance Agency for four SLFRF multifamily programs. Kristin assists with risk assessments, developing sample methodology and a work plan, and delivers weekly status reporting.

Senior Consultant (November 2024 to Present) NJ DCA Boardwalk

CohnReznick provides monitoring and compliance services to the New Jersey Department of Community Affairs for the Boardwalk. Kristin assists with risk assessments, application and expenditure testing, and meets with the subrecipients for project status updates.

Senior Consultant (March 2023 to Present) Florida Department of Commerce

CohnReznick provides monitoring and compliance services to the Florida Department of Economic Opportunity for the Community Development Block Grant-Disaster Recovery (CDBG-DR) and Community Development Block Grant-Mitigation (CDBG-MIT) programs. Kristin performs risk assessments, review of procurement and subrecipient policies and procedures for compliance to t.

OTHER WORK EXPERIENCE

Assistant Project Manager (September 2021 to March 2023) Will County, IL

While at Anser Advisory, Kristin assisted with ARPA funding for clients local to Florida and nationwide. In Will County, she collaborated with the county and their 120 local units of government with applications to receive Federal

Proposed Labor Category

Junior Grant Manager – Task Areas 2, 3, 4, 5, 8, 9, 10, 12, and 15

Proposed Task Areas

- 2. Financial Compliance, Oversight, and Fraud Prevention
- 3. Duplication of Benefits (DOB) Compliance
- 4. Procurement Compliance and Monitoring
- 5. Claims, Appeals, and Case Reviews
- 8. Program Performance Monitoring and Evaluation
- 9. Civil Rights, Fair Housing, Labor Standards, and Historic Preservation
- 10. Audit Readiness and Monitoring Support
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- B.S., Florida State University



funding as a subrecipient. Throughout this she coordinated weekly and monthly meetings for internal and external control, determined eligibility risk for subrecipient projects, tracked subrecipient application process through a project management software system, compiled subrecipient project information, invoices, and purchase orders for the Treasury reporting portal.

Assistant Project Manager (September 2021 to March 2023)
North Lauderdale, FL

Kristin assisted North Lauderdale, FL with ARPA funding and directly met with the city to assess their needs and aligned these needs with ARPA funding. She created and developed a communications plan with the city manager and grants manager to keep residents informed on available programs, guided residents through the application process, and reviewed applicants/applications before being finalized by the city.



Tiffany Thompson

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Thompson is a Senior Consultant at CohnReznick with over 15+ years of Government and Public Sector Advisory experience. She handles various projects that range from providing compliance services for the Public Sector Advisory Team to policy and operational support services.

Currently, Ms. Thompson is supporting various projects by providing financial statement analysis, expenditure testing for allowability, researching emergent compliance benchmarks, writing process improvements as well as assessing accounting and operating controls to determine adequacy. Her expertise includes federal procurement and program requirements as outlined by Code of Federal Regulations, audit requirements for federal awards, reporting requirements in relation to federal grants management, and program and financial compliance monitoring.

Tiffany is a former Internal Auditor for the State of Florida, Department of Legal Affairs. She was also a Financial Compliance Officer for the State of Florida, Department of Agriculture and Consumer Services.

EXPERIENCE

Assistant Project Manager (June 2022 to Present) Florida Department of Commerce (FloridaCommerce)

CohnReznick brings deep experience in compliance monitoring for over \$1.3 billion in Community Development Block Grant-Mitigation (CDBG-MIT) and Disaster Recovery (CDBG-DR) funding tied to Hurricane Michael recovery efforts. Our work spans critical program areas such as housing, workforce development, HMGP match, hometown revitalization, planning, infrastructure, and facility hardening. We conduct risk assessments, perform both onsite and desk monitoring, and provide technical assistance to more than 120 subrecipients to ensure alignment with federal and state requirements. Tiffany plays a key role in this effort by assessing internal controls, testing program expenditures and labor standards, and delivering consistent reporting to stakeholders. Her work directly supports the development of policies, procedures, and SOPs, strengthens financial oversight and fraud prevention, and promotes procurement practices that

Proposed Labor Category

Junior Grant Manager – Task Areas 1, 2, 3, 4, 5, 8, 10, 12, and 15

Proposed Task Areas

- 1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
- 2. Financial Compliance, Oversight, and Fraud Prevention
- 3. Duplication of Benefits (DOB) Compliance
- 4. Procurement Compliance and Monitoring
- 5. Claims, Appeals, and Case Reviews
- 8. Program Performance Monitoring and Evaluation
- 10. Audit Readiness and Monitoring Support
- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- M.B.A., Florida Agricultural & Mechanical University
- B.S., in Finance and Multinational Business Operations, Florida State University



align with compliance standards.

Compliance Review Specialist (July 2024 to March 2025)
Massachusetts Emergency Management Agency (MEMA)

CohnReznick provided comprehensive grant coordination, compliance oversight, technical assistance, and administrative support for federally funded disaster relief programs in response to the COVID-19 event within the Commonwealth of Massachusetts. Our team was responsible for applicant outreach, training, and technical assistance, as well as conducting detailed project reviews to support program integrity and readiness. Tiffany conducted fiscal and programmatic compliance reviews of pre-obligated subrecipient projects in accordance with FEMA Public Assistance (PA) program guidance. Her work contributed to strengthening internal controls, validating project eligibility, and supporting consistent application of federal requirements.

Senior Consultant (January 2022 – Present)
State of New Jersey

New Jersey Department of Education (NJDOE)

New Jersey Department of Community Affairs (NJDOCA)

New Jersey Department of Health (NJDOH)

New Jersey Department of Treasury – OMB and Division of Taxation

New Jersey Department of State (NJDOS)

New Jersey Department of Corrections (NJDOC)

CohnReznick partnered with the New Jersey Office of Management and Budget (OMB) to conduct integrity monitoring for several New Jersey State agencies (DOH, DOC, DCA, DOE, DOS) that received allocations of CARES (CRF) and Consolidated Appropriation Act funds, the total of which exceeded \$1.3 billion. Our professionals reviewed all program expenditures, program design, policy decisions, etc. to confirm compliance with state and federal guidance.

- Attend meetings with NJ leadership to provide updates on progress of planning, execution, and reporting.
- Test expenditures to assess risk involved. Monitor and report issues of fraud, waste, and abuse. Evaluate compliance with federal and state laws, policies, and regulations.
- Assist in finalizing deliverables such as risk assessments and quarterly reports.

Senior Consultant (January 2023 – August 2023)
Texas Department of Housing and Community Affairs (TDHCA)

CohnReznick was engaged to perform Integrity Oversight Monitoring, including Program and Performance Monitoring, Financial Monitoring and Grant Management and Anti-Fraud Monitoring for Homeowner Assistance Funds (HAF). The Homeowner Assistance Fund (HAF) authorized by the American Rescue Plan Act, provided \$9.961 billion to support homeowners facing financial hardship associated with COVID-19. Funds from HAF were used for assistance with mortgage payments, homeowner's insurance, and utility payments.

- Reviewed payment application process and its compliance with contractual and federal/state requirements.
- Developed and reported recommendations regarding potential payment issues and overall grant management.
- Performed periodic reporting of project findings including issues of fraud, waste, and abuse.



Senior Consultant (November 2021 – November 2022)
Florida Department of Children and Families (DCF)

CohnReznick provided compliance monitoring and oversight services on over \$68 million in funding for the HUD Emergency Solutions Grant (ESG). This source of funding was available to the State of Florida to assist with street outreach, rapid re-housing and sheltering of homeless populations. Our team's role was to review program parameters for compliance with federal guidance, provide monitoring over subrecipient's use of the funding, and secure a defensible grant.

- Point of contact for DCF questions and concerns, providing regular updates on the status of the project to all stakeholders.
- Performed risk assessments, sample testing, and assisted with the drafting of quarterly and onsite monitoring reports.
- Prepared weekly and monthly status dashboards reflecting programmatic and financial analysis.
- Developed and implemented recommendations regarding operational inefficiencies and process improvements.



Caitlin Cullman

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Cullman is a detail-oriented, adaptable, and highly motivated advisory professional with three years of experience in collaborative consulting, strategically providing research, administrative, and programmatic support to clients across governmental, nonprofit, and private sectors.

In Ms. Cullman's current role as a Senior Consultant, she regularly provides advisory services in accordance with federal and state regulations and 2 CFR 200 guidelines, as well as project management, policy development, and compliance monitoring for various state agency engagements, ensuring successful implementation and monitoring of complex programs and projects.

EXPERIENCE

Senior Associate (March 2025 - August 2025)

City of Atlanta Department of Grants and Community Development

CohnReznick has been asked to provide project and grant management support for the City's Department of Grants and Community Development (DGCD) federal grant programs including CDBG, HOME, and HOPWA. Specifically, we have been tasked to serve as expert advisors performing fund reconciliations, environmental reviews, application reviews, underwriting, and revising policies/procedures and SOPs for DGCD.

- Coordinate with stakeholders to identify policy or program related compliance issues.
- Developed internal HOME policies and procedures and evaluated compliance with 2 CFR 200 requirements.

Senior Associate (March 2025 - Present)

Clean Energy Fund – Texas

CohnReznick serves as the primary vendor for Clean Energy Fund of Texas Solar for All (CEFTX - SFA) program funding. CohnReznick assessed CEFTX's policies, procedures, and systems, identifying improvements for efficiency and compliance with EPA requirements and 2 CFR 200. Recent updates to 2 CFR 200 were integrated, focusing on data protection, procurement, and grant administration. Collaborating with key SFA partners, CohnReznick developed Program Guidelines that meet EPA standards.

Proposed Labor Category

Junior Grant Manager – Task Areas 2, 4, 10, 12, 15, and 16

Proposed Task Areas

2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management

Education

- M.A., Public Policy, Mills College
- B.A., Politics, Economics, Policy, and Law (PEPL), Mills College, Summa Cum Laude



Recommendations included integrated policies, procedures, and systems for efficient grant administration and reporting.

- **Program Implementation and Federal Compliance Infrastructure:** Supported in the development and implementation of program policies, procedures, and systems to ensure full adherence to 2 CFR 200, EPA Terms and Conditions, and Solar for All Terms and Conditions.
- **Technology and Reporting Systems:** Supported CEFTX on configuring systems for tracking budgets, milestones, and deliverables, including contingency planning for funding disruptions. In instances where the selected technology could not meet all of the needs of the program, CohnReznick advised on wraparound products that could accomplish the program goals.
- **Stakeholder Coordination:** CohnReznick worked in collaboration with CEFTX and its program partners to identify stakeholders, define disparate and coordinated scopes of work, and establish a unified framework for engagement, implementation, and accountability across all program activities.

Application Eligibility Reviewer (June 2023 – August 2024)

Office of the Governor of Texas

CohnReznick is the sole vendor to the Office of the Governor of Texas for providing federal grant oversight and monitoring services for funding received by the State of Texas. CohnReznick provides these services for the state's entire portfolio of programs and projects funded by the Infrastructure Investment and Jobs Act (IIJA), the American Rescue Plan Act (ARPA), the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and the Consolidated Appropriations Act of 2021 (CAA). CohnReznick delivers comprehensive grant administration services, including: monitoring financial and programmatic compliance with state and federal requirements, providing technical assistance to subrecipients and beneficiaries, validating project-level expenditures, reviewing and processing applications for federal assistance, advising on systems development, and leveraging programmatic data to mitigate against fraud, waste, and abuse.

- Supported the development of Subrecipient Monitoring and Oversight processes.
- Performed detailed financial and programmatic reviews of application requests, verifying eligibility, accuracy, and alignment with grant objectives.

Provided technical assistance to subrecipients, supporting compliance with ARPA requirements.

Senior Associate (August 2024 - Present)

Louisiana Office of Community Development – IGX Reporting

CohnReznick provides Software Evaluation and Support Services for the Economic Development and Infrastructure (ED&I) Program team within the Office of Community Development, Disaster Recovery Unit. Funded by HUD's Community Development Block Grant Disaster Recovery Program (CDBG-DR), these services assist the state in long-term recovery efforts. CohnReznick's services encompass several key areas. In process review and optimization, CohnReznick offers recommendations on program processes, organizational structure, and internal quality control. Coordination with OCD stakeholders helps finalize implementation activities, while collaboration with system developers ensures progress tracking, issue resolution, and User Acceptance Testing. Additionally, CohnReznick aids in developing or revising SOPs, process flows, and templates. In reporting and analytics, CohnReznick reviews and aligns system data with desired dashboards and reporting needs. Establishing a data dictionary, cleaning up existing data, and standardizing it are part of the services. Scheduled reports are prepared and delivered to OCD, along with drafting system operational and reporting requirements. Training services include modifying training materials to support changes in process and system design. CohnReznick coordinates with OCD to record tailored trainings for each user type. Project management support involves tracking progress, stakeholder coordination, and status reporting. CohnReznick provides recommendations on program



processes, organizational structure, and internal quality control. This comprehensive support ensures the efficient and effective operation of the ED&I programs.

Process & Program Workflow Optimization: Recommend and implement improvements to processes, structure, and resource use in coordination with OCD. Supported in the implementation of monthly subrecipient report to include milestone tracking activities.

System Support: Collaborate with developers and OCD to manage system updates, testing, and requirements.

Grants Specialist (November 2024 - Present)

New Jersey Department of Administration – Office of Attorney General

The New Jersey Department of Law and Public Safety, Division of Administration (DOA), required a professional services vendor to support their grant administration staff. The vendor, assigned by the DOA grants management team, assists in gathering required documentation from awardees to facilitate contract execution. This scope may involve multiple rounds of document revisions to finalize documentation and budgets. DOA provides the vendor with checklists, program guideline documentation, and templates to ensure successful document collection.

- The first deliverable for this engagement involved documenting the overall grant application review and award process as outlined by the DOA. This task required interviewing client stakeholders, reviewing current process documents and checklists, and referencing existing policies where available.
- The second deliverable focused on supplementing a division lead in completing initial grant application supervisor reviews. Our team collaborated with the division lead to understand her review processes and subsequently took on aging supervisor reviews to assist in clearing the backlog.
- **Data & Reporting:** Align and standardize data from multiple sources, define reporting needs, and deliver scheduled reports. Reports integrate data from state fiscal system of record, DRGR, and Grant Management Solution.
- **Training:** Update and tailor technical specification training materials for revised processes and user-specific needs.

OTHER WORK EXPERIENCE

CDBG-DR Coordinator (August 2022 – May 2023)

Texas General Land Office (GLO)

Coordinated services in Homebuyer Assistance and Economic Revitalization programs to facilitate CDBG-DR housing activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$450 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

Programmatic and administrative support for grant disbursement;

Assessed applicant's ability to construct and operate multi-family housing utilizing CDBG-DR funds;

Analyzed gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment; and

Provided guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.



Kaylor Nelson

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Kaylor has over 18 years of experience working on disaster recovery & emergency service programs; requiring knowledge of Community Development Block Grant funds, Community Development Block Grant-Disaster Recovery Unit funds and Housing and Urban Development requirements. Kaylor has worked on many facets of disaster recovery programs, from file/policy being created, to initial application, appeal, pre & post-closing case management and QA/QC.

EXPERIENCE

Consultant (October 2021 – March 2023)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), LaERAP and HAF Programs

CohnReznick was contracted by the State of Louisiana to provide QA/QC consulting services for the Louisiana Emergency Rental Assistance Program (LaERAP) and the Homeowners Assistant Fund (HAF). These programs are designed to assist households affected financially by COVID-19.

- Train employees on file review process and the requirements of Louisiana Emergency Rental Assistance Program.
- Perform QA/QC review of contractor files to ensure applicants eligibility of LERAP.
- Assist manager in daily assignment of files.
- Perform review of files to determine files submitted by contractor meet policy guidelines to assist homeowners in making mortgage payments.

Consultant (March 2023 – Present)

The Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), Restore Louisiana Homeowner Assistance Program 2020 (RLHP)

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the RLHP 2020 Program. This program was designed to help homeowners repair or rebuild their homes that were damaged by 4 separate state disasters in 2020 and 2021.

Proposed Labor Category

Junior Grant Manager – Task Areas 5, 10, and 15

Proposed Task Areas

- 5. Claims, Appeals, and Case Reviews
- 10. Audit Readiness and Monitoring Support
- 15. Grant Management

Education

- B.S., Business Management, Southern University and A&M College
- Human Resource Management Certificate, University of Phoenix
- Graduate Accounting Certificate, University of Phoenix



- Review required documentation from contractors' files to ensure homeowners' eligibility for program, based on federal policies, program requirements, and internal procedures.
- Stay up to date on procedures and policy changes to ensure consistency and accuracy of files.

OTHER WORK EXPERIENCE

Housing Finance Specialist (May 2018 – October 2021)

Louisiana Housing Corporation

At Louisiana Housing Corporation served as supervisor for Louisiana Emergency Rental Assistance Program. Louisiana Emergency Rental Assistance Program was created to assist renters/landlords affected by COVID-19. Also worked as an Housing Finance Specialist III for the Road Home Small Rental program. Road Home Small Rental program created to assistance landlords who home was damaged by Hurricane Katrina and Rita.

- Served as supervisor for Louisiana Emergency Rental Assistance Program, duties included the following; file review, creating the appeal process, and training employees.
- Served as an Housing Finance Specialist for the Road Home program Small Rental Program, insuring files meet HUD/CDBG-DR guidelines to close out files.

Eligibility Benefit Determination Analyst II (February 2007 – March 2018)

Louisiana Road Home Program (Quadel Housing Consultants, and Hammerman and Gainer Inc.)

At Louisiana Road Home Program, program created to assist homeowners rebuild or sell home affected by hurricanes Katrina and Rita.

- Worked at Road Home program from initial application process to closing of program. Duties included reviewing files from the initial application process, through appeals when necessary and at the end ensuring compliance was met to CDBG-DR/HUD guidelines.



Bernard Ihaza

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Bernard Ihaza is a Senior Consultant in CohnReznick's Government and Public Sector Advisory practice with 10+ years of experience in emergency management services. Based in Baton Rouge, LA, he is a firm leader in providing policy and operational support services to government agencies including compliance and monitoring, QC/QA, and policy and procedure development and Data Operations. Bernard's work in this area includes contractor assessment reviews, QC reviews for Texas Division of Emergency Management, and financial and project management system assessment for the Louisiana Office of Community Development, Disaster Recovery Unit. Bernard has also assisted in a variety of engagements providing project management, financial management, policy and program compliance, and oversight consulting services to state and federal government clients.

EXPERIENCE

Consultant (May 2018 – February 2020)

Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), Restore Louisiana Homeowner Assistance Program (RLHP) 2016

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the Restore Program. This program was designed to help homeowners repair or rebuild their homes that were damaged by flood waters in March and/or August 2016.

- Assist in the development of new policies and procedures.
- Perform monitoring and testing procedures to detect fraud, waste, and abuse.
- Develop and monitor controls.
- Design and produce reports requested by clients.
- Communicate progress of projects, problems, and resolutions to clients
- Identify policy or program related compliance issues.
- Make recommendations for and coordinate resolutions and improvements.

Proposed Labor Category

Junior Grant Manager – Task Areas 5, 8, 10, and 15

Proposed Task Areas

- 5. Claims, Appeals, and Case Reviews
- 8. Program Performance Monitoring and Evaluation
- 10. Audit Readiness and Monitoring Support
- 15. Grant Management

Education

- Bachelor of Professional Studies in Business and Management, Excelsior College
- Associates in Applied Science Emergency Management, Fredrick Community College

Certifications

- Business Consulting - USIDHR Certified

Trainings

- Hazard Mitigation
- NIMS Public Information Systems
- Incident Command System (ICS)
- FEMA Grant Logistics



- Communicate and interact with government officials and stakeholders daily.
- Provide administrative and clerical support of project-related activities.
- Accountable for continuous quality improvement of the client experience, supporting the Call Centers, Field Staff and office operations.
- Proactively detect, report, and monitor for continuous quality improvement of the delivery of recovery service, identifying trends, observations, and opportunities against established service partner agreements.
- Participates in team and business partner calibration sessions, sharing identified trends, observations, and opportunities for improvement to realize tangible benefits to the disaster recovery process.
- Tracking and monitoring personal and team productivity and performance, adhering to established targets and service level agreements.

QA/QC Consultant (March 2020 – May 2021)
Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Performed grant coordination, financial and programmatic compliance, and administration work to respond, administer, organize, and monitor federally funded disaster grants within the State of Texas;
- Ensured deadlines are met, applications or other documentation are complete and correct before submission to federal authorities, monitoring activities are conducted in accordance with the project guidelines, and payment requests are promptly and correctly processed; and
- Performed budget monitoring and project site inspections, and document progress and/or completion of projects, causes for delays in project completion from established timelines, or deviations from the scope of work to ensure procurement and contracting compliance.

QA/QC Consultant (May 2021 – May 2022)
Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), LaERAP

CohnReznick was contracted by the State of Louisiana to provide QA/QC consulting services for the Louisiana Emergency Rental Assistance Program (LaERAP). These programs are designed to assist households affected financially by COVID-19.

- Perform monitoring and testing procedures to detect fraud, waste, and abuse
 - Supported Program Manager and Project Managers in achieving project goals and completing project deliverables.
 - Documented internal team procedures, developed checklists, tools and templates for teams to facilitate consistent and efficient operations.
 - Gathered information required for HUD, the state, and other parties related to reporting, activities performed, etc.
 - Provided training to team members related to procedures and policy updates; and
- Participated in meetings with clients and Program contractor.

**Consultant (May 2022 – Present)****Louisiana Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU), Restore Louisiana Homeowner Assistance Program 2020 (RLHP)**

CohnReznick was contracted by the State of Louisiana to provide Quality Assurance/Quality Control (QA/QC) consulting services for the RLHP 2020 Program. This program was designed to help homeowners repair or rebuild their homes that were damaged by 4 separate state disasters in 2020 and 2021.

- Assist in the development of new policies and procedures.
- Perform monitoring and testing procedures to detect fraud, waste, and abuse.
- Develop and monitor controls.
- Design and produce reports requested by clients.
- Communicate progress of projects, problems, and resolutions to clients
- Identify policy or program related compliance issues.
- Make recommendations for and coordinate resolutions and improvements.
- Communicate and interact with government officials and stakeholders daily.
- Provide administrative and clerical support of project-related activities.
- Identify policy or program related compliance issues.
- Proactively detect, report, and monitor for continuous quality improvement of the delivery of recovery service, identifying trends, observations, and opportunities against established service partner agreements.
- Tracking and monitoring personal and team productivity and performance, adhering to established targets and service level agreements.



Jennie Li

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Ms. Li is a Senior supporting the Government and Public Advisory practice within the Grants Management and Administration team. She has over four years of experience supporting federally funded grant programs across IJJA, ARPA, CARES Act, and other funding sources. She also brings five years of frontline experience supporting eligibility documentation and compliance procedures at a HUD-assisted property, providing a foundational understanding of federal housing requirements and tenant-based program oversight. Ms. Li has supported a range of state and local agencies, including the Texas Department of Housing and Community Affairs, Texas Division of Emergency Management, Texas Office of the Governor, New Jersey Office of the Attorney General, and the City of Atlanta Department of Grants and Community Development.

Her work spans program documentation, internal process coordination, and training and technical assistance material development. She brings over eight years of experience in visual and interactive design, including video production, infographics, and multimedia training content that strengthen communication and build capacity. She is known for making complex regulatory information accessible and supporting program implementation through clear, plain-language communication.

Core competencies include:

- **Grants Compliance & Program Support:** Supports implementation of federally funded programs through internal process coordination, eligibility review, and documentation management in alignment with 2 CFR 200 and agency requirements.
- **Training Material Development & Technical Assistance:** Develops plain-language job aids, guides, and presentations that translate complex federal guidance into accessible tools for subrecipients and internal users. Experienced in supporting TA delivery, including onboarding coordination and instructional support.
- **Accessible Formatting, Visual Design, & Clear Communication:** Applies strong design skills to create clear, user-friendly documents. Maintains awareness of accessibility standards and supports internal efforts toward formatting consistency and plain-language communication.

Proposed Labor Category

Junior Grant Manager – Task Area 12

Proposed Task Areas

12. Training, Technical Assistance, and Capacity Building

Education

- B.F.A., Graphic and Interactive Design, Temple University



- **Collaborative Engagement & Internal Coordination:** Coordinates with internal teams, project leadership, and applicants to support implementation efforts, streamline communication, and manage delivery of program materials and resources.

EXPERIENCE

Training and Technical Assistance Senior Associate (October 2024 – Present)

Texas Division of Emergency Management (TDEM) – Training

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. Including providing high-quality, customized training solutions that equip local and state partners with the knowledge and tools necessary to navigate the complexities of disaster recovery programs. Drawing on expertise in developing, delivering, and evaluating disaster recovery training. Training programs are developed by subject matter experts certified as: Certified Emergency Manager (CEM), Texas Emergency Manager (TEM), Certified Grants Management Specialists (CGMS) and Project Management Professional (PMP). The CohnReznick team's hands-on experience with FEMA Public Assistance, Fire Management Assistance Grants, debris management, and SDRS reimbursement/Mutual Aid ensures a well-designed training curriculum solution that is not only comprehensive but also directly aligned with TDEM's training needs.

- Supported the development of disaster recovery training and technical assistance materials, including digital and print-ready deliverables.
- Conducted research to inform production decisions for training materials, including vendor pricing, timelines, and format options.
- Assisted in the design and formatting of content to ensure alignment with program branding and clear communication.
- Coordinated with subject matter experts and internal teams to support curriculum development and session planning.
- Incorporated client feedback into design revisions to align materials with evolving training objectives

Training and Technical Assistance Associate (July 2024 – January 2025)

City of Atlanta Department of Grants and Community Development (DGCD) - HOME

CohnReznick supports the City with project management, completion of environmental reviews, financial and scope compliance, and oversight monitoring for projects funded under HUD's Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME), Housing Opportunities for Persons with AIDS (HOPWA) and Emergency Solutions (ESG) grant programs totaling over \$40M annually in grant funding. The CohnReznick team supports the City in establishing their Healthy Homes and Lead Hazard Reduction Programs including developing program policies and procedures, marketing materials, developing program support materials such as forms, review guides, trainings, etc..

- Developed applicant-facing materials to support outreach, improve public understanding of eligibility criteria, and guide participants through program processes.
- Created visual and written content to communicate application outcomes, next steps, and key program details in plain language.
- Contributed to internal capacity-building by supporting the reformatting of policy documentation and creating visual diagrams to illustrate complex program processes.



- Maintained consistency in tone, structure, and visual presentation across deliverables to align with program communication goals.

Training and Technical Assistance Associate (June 2025 – July 2025)

Clean Energy Fund of Texas

CohnReznick provided advisory services related to the Clean Energy Fund of Texas related to their Solar for All Program, the CHARGE Initiative. Working primarily with CEFTX, and in collaboration with their Program Partners, CohnReznick was a thought partner for all elements of a launching a new program; from developing an application, review and selection process, drafting program guidelines, written policies and procedures, to conducting financial reconciliations, and developing subrecipient trainings.

- Supported onboarding efforts by facilitating staff training and developing reference materials to aid new team members.
- Reviewed State Mutual Aid Reimbursement Requests for compliance with FEMA PA and state eligibility guidelines.
- Assessed documentation for completeness, allowability, and reasonableness in alignment with federal program requirements.
- Conducted follow-up with applicants to request missing materials and clarify submission details.
- Maintained documentation request logs to ensure audit trail and process accountability.
- Contributed to process improvements for the system of record and internal procedures, supporting increased efficiency and reviewer consistency.

Compliance Review, Training, and Technical Assistance Associate (October 2022 – July 2024)

Texas Office of the Governor

CohnReznick is the sole vendor to the Office of the Governor of Texas for providing federal grant oversight and monitoring services for funding received by the State of Texas. CohnReznick provides these services for the state's entire portfolio of programs and projects funded by the Infrastructure Investment and Jobs Act (IIJA), the American Rescue Plan Act (ARPA), the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), and the Consolidated Appropriations Act of 2021 (CAA). CohnReznick delivers comprehensive grant administration services, including: monitoring financial and programmatic compliance with state and federal requirements, providing technical assistance to subrecipients and beneficiaries, validating project-level expenditures, reviewing and processing applications for federal assistance, advising on systems development, and leveraging programmatic data to mitigate against fraud, waste, and abuse.

- Supported onboarding and informal training of new grant reviewers to build internal capacity and promote consistency.
- Initially led email intake team, managing over 2,000 inquiries before transitioning support to the help desk team lead.
- Provided applicant support via help desk phone line, contributing to a team that fielded over 6,000 calls.
- Verified COVID-19 impacts and assessed initial eligibility in alignment with program guidance.
- Reviewed expenses for allowability, reasonableness, and duplication of benefits, ensuring compliance with federal requirements.
- Validated documentation and issued follow-ups to address missing information; maintained audit trails and document histories.
- Communicated with small business applicants to clarify submissions, resolve issues, and ensure application completeness.



Compliance Review, Training, and Technical Assistance Associate (May 2021 – January 2022) **Texas Department of Housing & Community Affairs**

CohnReznick provides Application Eligibility Review services to TDHCA. Our team assists tenants and landlords who seek assistance for rent and/or utility arrears, or current and future months (up to 15 months total assistance). CohnReznick performs reviews of applications through the entire review cycle, including: initial reviews; communicating with tenants, landlords, and utility providers; setting up draw requests; placing applications into final disposition; and processing first-level appeals.

- Coordinated onboarding training for over 500 incoming prime and subcontractor staff, supporting consistent program delivery for Emergency Rent Relief.
- Conducted first- and second-level compliance reviews in the system of record, including eligibility checks, budget setup, and draw request approvals.
- Supported a team of 80 reviewers by managing initial review workflows and helping ensure quality assurance in high-volume application processing.
- Maintained internal knowledge and resource platforms to ensure staff access to current procedures, templates, and guidance materials.
- Communicated with landlords and tenants to request missing documentation, provide clarification, and confirm participation.
- Tracked audit history of document requests and responses to maintain complete application files.
- Linked landlord and tenant records within the system to ensure accurate eligibility determinations and processing.
- Contributed to ongoing compliance operations while supporting internal technical assistance and procedural consistency.

Compliance Review Senior Associate (July 2025 – Present) **New Jersey Office of Attorney General – Grant Administration**

The New Jersey Department of Law and Public Safety, Division of Administration (DOA), required a professional services vendor to support their grant administration staff. With over twenty Divisions and Offices relying on DOA for centralized grant administration services, the client needed assistance in assessing and making recommendations for how it administers grant awards. This involves assisting with drafting policies and procedures, processing reimbursement and distribution requests, verifying the allowability of costs, and drafting corrective action plans for DOA to follow up with awardees to request missing documentation.

- Reviewed cost reimbursement submissions for completeness and alignment with federal and program-specific guidelines.
- Verified supporting documentation, including invoices and contracts, against approved budgets and eligible cost categories.
- Researched applicable regulations to support consistent, compliant review practices.
- Flagged discrepancies and elevated potential compliance issues for further review by appropriate parties.

Compliance Review Senior Associate (October 2024 – Present) **Texas Division of Emergency Management - TIFMAS**

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. Including the responsibility for reviewing TIFMAS reimbursement requests and ensuring they align with TDEM's mutual aid



reimbursement guidelines. This involves confirming that all labor, equipment, travel, material and contract costs are adequately supported and documented within TDEM's online Grant Management System (GMS). Ensuring jurisdictions receive their reimbursement which starts with notifications of eligible reimbursement costs after a deployment, through the submittal and review process, until finally passing the finalized review over to TDEM for confirmation and payment. The CohnReznick team also supports these processes with jurisdiction outreach to ensure a smooth reimbursement process.

- Conducts compliance reviews of mutual aid cost reimbursement submissions under TIFMAS, EMTF, and TXTF, ensuring alignment with state and federal guidance.
- Assesses submitted documentation for completeness, allowability, and audit readiness in accordance with program requirements.
- Communicates with applicants to clarify requirements, resolve discrepancies, and support submission quality.
- Identifies documentation gaps and supports efforts to improve reimbursement outcomes through clear applicant guidance.
- Maintains accurate records of reviews and contributes to internal quality assurance practices.

Compliance Review Associate (March 2022 – October 2022)

Texas Division of Emergency Management - DFRU

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Supported onboarding efforts by facilitating staff training and developing reference materials to aid new team members.
- Reviewed State Mutual Aid Reimbursement Requests for compliance with FEMA PA and state eligibility guidelines.
- Assessed documentation for completeness, allowability, and reasonableness in alignment with federal program requirements.
- Conducted follow-up with applicants to request missing materials and clarify submission details.
- Maintained documentation request logs to ensure audit trail and process accountability.
- Contributed to process improvements for the system of record and internal procedures, supporting increased efficiency and reviewer consistency.



Samuel Hitchcock

CDBG-DR Program Manager | Metric Consulting

BIOGRAPHY

Mr. Hitchcock 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.

With a Master’s in Global Leadership and Sustainable Development from Hawaii Pacific University and a background in sustainable agriculture, he brings a unique perspective. His experience living and studying in Hawaii has given him a deep understanding of climate adaptation, renewable energy, and resilient infrastructure, particularly in coastal and disaster-prone communities. He integrates these principles into CDBG-DR programs, incorporating green infrastructure and sustainable solutions to enhance community resilience. Known for his reliability, flexibility, and goal-oriented leadership, he ensures effective program administration, regulatory compliance, and equitable recovery outcomes for disaster-impacted communities.

EXPERIENCE

Project Manager (03/2019 – 07/2023) Community Development Block Grants

Mr. Hitchcock managed and designed CDBG-DR Housing, Agriculture, and Economic Development programs for state and territorial government agencies, ensuring HUD compliance and efficient fund distribution. Developed programmatic guidelines, built equitable program processes, and streamlined IT systems for grants management to enhance transparency and oversight. 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.

- Puerto Rico Department of Housing (PRDOH) – Hurricane Maria (2017)

Proposed Labor Category

Compliance Coordinator – Task Areas 1 and 12

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
12. Training, Technical Assistance, and Capacity Building

Education

- M.A., Global Leadership & Sustainable Development, Hawaii Pacific University
- B.S., Environmental Studies, University of Montana



- ReGrow Puerto Rico – Urban & Rural Agriculture Program
 - Small Business Incubators & Accelerators – Economic Development Program
- Florida Department of Economic Opportunity (DEO) – Hurricane Michael (2018)
 - Rebuild Florida – Housing Rehabilitation & Reconstruction Program
- California Department of Housing & Community Development – Wildfire Disasters (2017-2020)
 - ReCoverCA – Housing Rehabilitation & Reconstruction Program

Program Manager (08/2023 – Present)

FEMA Programs, New Mexico Legal Aid

Mr. Hitchcock manages the day-to-day operations of a large Disaster Legal Services program, overseeing civil legal services, community outreach, grant development, and compliance, while coordinating public-facing activities, stakeholder engagement, and disaster recovery efforts to ensure accurate grant delivery and alignment with federal, state, and local regulations.



Emily Pinell

Grant Manager | Metric Consulting

BIOGRAPHY

Ms. Pinell 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, Ms. Pinell excels in collecting, analyzing, and leveraging data to enhance solutions, demonstrating a consistent commitment to success.

EXPERIENCE

Associate HOME-ARP Consultant (05/2023 – Present)
Program Administration Services: HOME-ARP, City of Nashua, NH

Mrs. Pinell works closely with the City of Nashua 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.

Grant Writer (02/2023 – Present)
Grant Preparation Services: Assistance to Firefighters, City of Pinellas Park, FL

Metric was contacted by the Pinellas Park Fire Department to create and apply for the Assistance to Firefighters Grant on behalf of the Department. Our team worked closely with the Department to draft narratives that accurately displayed the Department's needs, and to provide them with a strong, submittal-ready application to FEMA. We evaluated the Department's goals for the program and ensured that they were in line with those outlined in the Notice of Funding Opportunity provided by the Department of Homeland Security.

Grant Writer (09/2023 – Present)
Reconnecting Communities and Neighborhoods Grant Preparation Services, Chipley, FL

Metric worked with the City of Chipley to create and apply for the DOT

Proposed Labor Category

Compliance Coordinator – Task Areas 12 and 15

Proposed Task Areas

- 12. Training, Technical Assistance, and Capacity Building
- 15. Grant Management

Education

- B.S., Business Administration, Nicholls State University (2022)

Certifications

- FEMA IS-100
- Excel for Accounting and Finance Professionals, 2021
- IS-0230.e: Fundamentals of Emergency Management
- IS-276.a: Benefit-Cost Analysis Fundamentals
- IS-01000: Public Assistance Program and Eligibility
- IS-1001: The Public Assistance Delivery Model Orientation
- IS-1002 FEMA Grants Portal
- IS-1005: Public Assistance Alternative Procedures
- IS-1006: Disaster Damage and Developing Project Files
- IS-1007: Detailed Damage Description and Dimensions
- IS-1008: Scope of Work Development



Reconnecting Communities and Neighborhoods (RCN) Grant. Titled “Uniting Communities of Chipley through Equitable Access and Mobility Project”, the proposed project aimed to advance community-centered transportation by addressing the dividing facilities that prevent equitable access to safe, reliable transportation infrastructure. Metric worked closely with the city to assess their needs and provide them with a complete application to submit to DOT.

Grant Writer (09/2023 – Present)**Department of Transportation’s Neighborhood Access and Equity Grant Preparation Services, Morgan City, LA**

Metric was selected by the City of Morgan City to prepare and apply for the Department of Transportation’s Neighborhood Access and Equity (NAE) Grant program. Metric provided the city with cost estimating, needs assessments, and application creation from start to submittal for this project. The project, named the “Connecting Neighborhoods and Communities to Opportunity through Equitable Infrastructure Project,” was designed to enhance community-oriented transportation by tackling the barriers that hinder fair access to secure and dependable transportation infrastructure.

Senior Fiscal Recovery Specialist (06/2023 – 09/2023)**FEMA PA Consultant, Pasco County, FL**

Ms. Pinell conducts 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.

Lead Senior Consultant (11/2022 – 04/2023)**Home Investment Partnerships Program – American Rescue Plan (HOME-ARP) Consulting Services, Franklin County, OH**

Metric worked with Franklin County to develop a HOME-ARP Allocation Plan, ensuring the creation of a plan that best serves the Franklin County community. Metric’s tasks included developing an Allocation Plan schedule, conducting the required agency and service provider consultation process, developing the Allocation Plan in compliance with all HOME-ARP regulations, conducting required public participation, and assisting Franklin County in the submission of the final Allocation Plan to HUD.

Lead Senior Consultant (07/2022 – 04/2023)**Home Investment Partnerships Program – American Rescue Plan Consultation Services, City of Columbus, OH**

Metric was selected by the City of Columbus, Ohio to provide grant consultation services for the City’s \$16M HOME-ARP allocation. Metric’s team created a detailed project work plan to ensure the creation of a compliant and comprehensive funding Allocation Plan. Based on the plan, Metric designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. Then, Metric assisted with the creation and submission of the required Allocation Plan.

Senior Grant Consultant (04/2022 – 07/2023)**Grant Management Project, Terrebonne Parish Consolidated Government, LA**

As a subconsultant, Metric was selected by the Terrebonne Parish Consolidated Government for grant management and administrative services for HUD, FEMA, and other federally funded programs. Metric supported the Parish by 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. Ms. Pinell provided outreach services, identified unmet needs that fit program requirements, and developed projects that met



policy guidelines.

PREVIOUS EXPERIENCE

Disaster Recovery Analyst (09/2022 – 11/2022)

Richmond University Medical Center

Ms. Pinell collaborated with the client to compile all supporting documentation and reconciled project costs for all completed work. She uploaded the supporting documentation into FEMA's Grants Portal so that FEMA could review the projects and obligate funding. She developed spreadsheets to reconcile financial records and cataloged supporting documentation in proper files for final reconciliation.

Senior Recovery Grants / Closeout Specialist (08/2022 – 11/2022)

Lane Electric

Ms. Pinell compiled all supporting documentation and reconciliation of project costs for work that had been completed for the 2020 Wildfires that impacted the State of Oregon. She develops spreadsheets for reconciling financial records and catalogs supporting documentation in proper files for final reconciliation. She was required to communicate with client contractors and field staff for missing documentation. By working with the Closeout Financial Grants Manager and directly with Lane Electric financial department, she processes all documentation to ensure accuracy for the development of final reconciliation of closeout packages and audits. She assesses project's work status, costs, and supporting documentation against the actual Scope of Work to reconcile estimated project costs with actual costs of completed work.

Disaster Recovery Analyst (2016 – 2022)

PSEG/LIPA

Ms. Pinell compiled all supporting documentation and reconciliation of project costs for work that was completed. She developed spreadsheets to reconcile financial records and cataloged supporting documentation for final reconciliation. She was required to communicate with client contractors and field staff for missing documentation. She processed all documentation to ensure accuracy for the development of final reconciliation of closeout packages and audits. She also assessed each project's work status, costs, and supporting documentation against the actual Scope of Work to reconcile estimated project costs with actual costs of completed work.

Project Specialist (05/2016 – 10/2016)

City of Palm Coast, FL

Ms. Pinell was responsible for the development of all Force Account, Labor, equipment, and materials to support the development of Project Worksheets for the City. Ms. Pinell worked closely with the City's various departments to gather required source documentation for submittal to FEMA.



Justin Cauley

Disaster Recovery Specialist | Metric Consulting

BIOGRAPHY

Mr. Cauley 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.

EXPERIENCE

URA Specialist | City of Houston (01/2024 – Present) Harvey Buyout Program, Texas General Land Office, Houston, Texas

With Mr. Cauley’s extensive knowledge of the Uniform Relocation Act of 1970 regulations, he is able to provide 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. Mr. Cauley 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 locator services to ensure contact was made and all necessary documentation was present within each file.

Proposed Labor Category

Compliance Coordinator – Task Area 13

Proposed Task Areas

- 13. Relocation Program (URA/TRA) Development and Compliance Support

Education

- B.S., English, Troy State University (2011)

Certifications

- IS-00001.a: Emergency Manager: An Orientation to the Position
- IS-00029: Public Information Officer Awareness
- IS-00030.a: Mitigation EGrants System
- IS-00042: Social Media in Emergency Management
- IS-00100.b: Introduction to Incident Command System
- IS-00200.b – ICS for Single Resources and Initial Action Incident
- IS-00393.a: Introduction to Hazard Mitigation
- IS-00453: Introduction to Homeland Security Planning
- IS-00632.a: Introduction to Debris Operations
- IS00634: Introduction to FEMA’s Public Assistance Program

**Senior Grant Consultant (05/2022 – 04/2023)****HOME Investment Partnerships Program – American Rescue Plan Consultation Services, City of Columbus, Ohio**

The allocated funds are intended to reduce homelessness and increase housing stability across the country. Our team created a detailed project work plan to ensure the creation of a compliant and comprehensive funding Allocation Plan. Based on this plan, we designed and implemented stakeholder engagement strategies, including an online survey and in-person input meeting. Then, the Metric team assisted the City in the required consultation services report for the Allocation Plan.

Process Engineer (09/2021 – 02/2023)**COVID-19: Response and Assistance, Unified Government of Wyandotte County and Kansas City, Kansas**

The Unified Government sought assistance in maximizing its ARPA funding opportunities while identifying additional federal and state grants to provide relief to citizens. To expedite their efforts, the Unified Government requested grant discovery, community liaison, and technical government grant writing services to maximize their allocated funds. Metric was brought on to identify federal funding opportunities through ARPA, and to collaborate with state agencies to ensure the Unified Government received the maximum amount of funding. Metric provided the Unified Government with comprehensive grant management and cost recovery services, including strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance. Metric also supported the Unified Government through the creation and operation of an ARPA Small Business Grants Portal, which is using \$550,000 of allocated ARPA funds to directly support small businesses within the Unified Government.

Senior Grant Consultant (05/2021 – 07/2022)**Needs Assessment for ARPA Funding, Saline County, Kansas**

Metric's team was engaged by Saline County to support their capabilities to ensure compliance with federal regulations while maximizing the usage of ARPA funding in the local community. Metric's team conducted a Needs Assessment for one of Saline County's ARPA funded programs, and Metric assisted Saline County as they identified that the safe diversion of community members from incarceration through the creation of pathways to specialized services and treatment was one of their goals. The goal of the Needs Assessment was to obtain a full picture of the unmet needs that ARPA funding could address in the interconnected areas of criminal justice, mental health, and public safety. After determining local needs within these priority areas, Metric determined which ARPA funding path would be most beneficial. After analyzing local data and an array of national programming, Metric built an encompassing image of potential ARPA funding streams. Then, Metric determined that Saline County's ARPA funds should be allocated towards developing a mental health program.

Data Manager (07/2020 – 06/2021)**COVID-19: SPARK Grant Management Support, Finney County, Kansas**

In March 2020, the COVID-19 pandemic was declared a major disaster throughout the U.S. Later that month, Kansas' Governor issued an emergency declaration and authorized the use of state resources and personnel to assist with the pandemic's response and recovery operations through the use of Strengthening People and Revitalizing Kansas (SPARK) grant funds. The allocation of SPARK grant funds opened the door for reimbursement for all eligible public assistance applicants for the County, including nearly 37,000 residents. Metric was retained by Finney County to support grant management and writing for COVID-19 related reimbursements aimed at increasing resiliency by improving the systems that support housing, government access, and public infrastructure. Metric provided Finney County with comprehensive



grant management and cost recovery services that covered strategic planning, FEMA PA cost recovery, program implementation support, and technical assistance and training. Metric managed a grant program that included \$10.9 million in funding.

QA/QC Lead (07/2020 – 06/2021)**COVID-19: Recovery and Response Assistance, Seward County, Kansas**

Seward County is located on the southern border of Kansas and has a population of 23,000 residents. The COVID-19 disaster declaration opened reimbursement possibilities for all eligible PA applicants in Seward County, and the COVID-19 disaster declaration was backdated to 01/20/2020. Metric was retained by Seward County to support grant management and writing for COVID-19-related reimbursements. As their technical consultant for FEMA PA cost recovery, Metric is guiding Seward County through FEMA requirements and ensuring they receive the maximum eligible recovery of costs. Additionally, Metric provides community outreach, cost recovery, grant management, program implementation support, and technical assistance and training. Metric has implemented several programs that cover rent, mortgage, and utilities assistance for households - including those with low-to-moderate incomes (LMIs), recovery grants for small businesses and microenterprises, reimbursement of COVID-19 related expenses for government entities and non-profits, and grants for community-supported COVID-19 response and recovery initiatives. Overall, Metric has managed a grant program of approximately \$7 million in funding and has implemented four separate programs that have served a total of 467 households (84% LMI), 65 businesses, and 39 community organizations.

Data Manager (07/2020 – 06/2021)**SPARK Grant Management Support, Neosho County, Kansas**

Metric provided Neosho County with comprehensive grant management, program management, and cost recovery services. The work included a community needs assessment, strategic planning, program design and implementation, training, case management, and project closeout. Metric actively engaged with the community to identify and apply for additional funds and to implement strategies for a holistic recovery effort, and this approach led to Neosho County securing nearly \$1 million in FEMA PA assistance funding to supplement COVID-19 recovery efforts funded by the U.S. Treasury Coronavirus Relief Fund (CRF) grant. Metric collaborated with local non-profit groups to ensure that Neosho County met the needs of their residents, small businesses, and community organizations. Metric's comprehensive approach allowed Neosho County's CRF dollars to be stretched, as Neosho County leveraged other grant programs for the items they could fund. It was one of the state's most successful housing support grant programs, and Neosho County is now cited as one of Kansas' grant management leaders.

Program Manager (05/2019 – 08/2020)**Hurricane Maria, Puerto Rico Department of Housing, San Juan, Puerto Rico**

Mr. Cauley 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.

Data Collection Supervisor (10/2016 – 06/2019)

Hurricane Michael, FDOT District 3, Florida

Mr. Cauley served as a supervisor for the data collection and QA/QC of debris tickets for all off-system roadways for Gulf County, Florida. Mr. Cauley also worked with the contractors performing right-of-way clean-up to reconcile all tickets and prepare and finalize each invoice for reimbursement.

Grant Consultant (03/2016 – 08/2018)

CDBG-DR for New York Rising, Governor's Office of Storm Recovery, New York

Mr. Cauley 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.

Billing Analyst (02/2014 – 08/2014)

South Carolina Severe Winter Storm, South Carolina Department of Transportation

Mr. Cauley served as a billing analyst and performed compliance monitoring to ensure Federal and State regulations were met. He assisted the Project Manager with the invoicing and reconciliation phase of funding for this project.

Recovery Consultant (09/2013 – 03/2014)

2013 Colorado Flooding, Larimer County, Colorado

Mr. Cauley served as a Recovery Consultant and provided comprehensive disaster recovery services. He worked in coordination with the Federal Highway Administration (FHWA) Disaster Recovery Reports. He successfully advocated on behalf of the County to obtain FEMA funding for debris removal from streambeds and demolition of residential structures.

Mobility Counselor (02/2013 – 03/2016)

(CDBG-DR) Program (Homeowner Opportunity Program) – Texas General Land Office

Justin served as a Mobility Counselor responsible for providing relocation support services to eligible homeowners under the HUD CDBG-DR funded Homeowner Opportunity Program (HOP) within the Houston-Galveston Area Council of Government (H-GAC), Galveston County, and City of Galveston, Texas. HOP was a Disaster Recovery Housing Program through which income-qualified applicants living in FEMA-designated "High Risk" areas or areas of high minority and/or poverty concentration may elect to rehabilitate or reconstruct their existing home or relocate to a safer and higher opportunity area. This program involved relocation counseling, and the provision of licensed real estate professionals to explain the options and choices available while encouraging housing choice.



Ethan Zisek

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Ethan Zisek has over four years of experience assisting clients in building automated data extract, transform, and load (ETL) processes, developing data visualizations, publishing reports, and implementing new solutions using technology. This helps create replicable and efficient reporting that program managers can trust when making decisions or reviewing progress. Mr. Zisek is well-versed in several technologies, including Power BI, Python programming, SQL, SharePoint, Power Automate, and AWS cloud services.

EXPERIENCE

Senior Consultant (May 2024 – Present)
State of Louisiana Office of Community Development (OCD) Disaster Recovery Unit (DRU)

CohnReznick is responsible for assisting OCD-DRU with development of their grants management tool for management of its grants portfolio, including its CDBG-DR programs. We are tasked with providing general recommendations on program processes, organizational structure, and developing internal quality control processes. We performed a gap analysis, evaluate implementation options to resolve identified gaps, and coordinate with OCD stakeholders to finalize priority of implementation activities. We identify and assist with program, process, and system changes that provide greater efficiency and effectiveness and optimizes use of personnel and other resources. Along with OCD-DR, we assist in the development or revision of SOPs, process flows, templates business operational requirements and business reporting requirements.

As requested by OCD-DRU, CohnReznick team members coordinate with the system developer to track progress, resolve issues, and perform User Acceptance Testing. We analyze available system data from the developer and align with desired state dashboards and reporting needs.

- Documented the existing data landscape, identifying relationships between the program’s data sources and developed a data dictionary notating the characteristics of all data elements;
- Developed ETL processes to recreate and develop data visualizations in PowerBi to facilitate program reporting;

Proposed Labor Category

Reporting Specialist – Task Area 7

Proposed Task Areas

- 7. Needs Assessments, Market Analysis, and Geospatial Support

Education

- B.S. in Economics, North Carolina State University 2015-2019



- Analyzed the integrity, consistency, accuracy of existing program data sources and versus the needs of the program;
- Recommended and developed design and data changes to the program's existing management software to improve the program's data collection processes; and,
- Coordinated the implementation of design and data changes with the OCD-DRU's software vendor.

Senior Consultant (September 2023 – February 2024)

Port of Houston Authority (PHA)

Project Description: As a subcontractor to AtkinsRéalis, CohnReznick provides financial analysis support service to ensure that the Port of Houston Authority (PHA) channel improvement projects, Project 10 and Project 11 – most high-profile projects, between the PHA and the U.S. Army Corps of Engineers (USACE), have accurate accounting to meet federal requirements. The purpose of this engagement is to maximize the amount of in-kind contributions that are eligible for inclusion in the shared costs for costs sharing purposes under the applicable cost sharing agreement that would also be subject to audit by the Government to determine the reasonableness, allocability and allowability. This was done by ensuring PHA maintained records that complied with the Final Environmental Impact Statement (FEIS), 2 C.F.R. 200, and other mandatory requirements stated by applicable Federal Laws, Regulations and Policies required by the USACE to be considered as eligible for In-Kind credit (WIK).

- Cleaned and combined data from several different sources of WIK expenditures and related data into a database;
- Developed and automated the ETL and process using Python and other technologies to facilitate reporting for PHA; and,
- Developed PowerBi reports for PHA to track WIK expenditure amounts to ensure project requirements are being met.

Senior Consultant (June 2022 – Present)

Office of the Governor (Texas) (OOG)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Developed management workflows to support staff management;
- Cleaned and compiled unstructured report data for review;
- Created data dictionaries and documented data relationships;
- Managed data processes and developed reports to support day-to-day operations; and,
- Automated workflows for the application review process.

Senior Consultant (March 2022 – Present)

Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Created a centralized data source across program data sources;



- Developed automated ETL processes and automated reporting for the management of program operations and tracking of program workflows; and,
- Designed data visualization and KPIs in PowerBi for daily reports.

Consultant (January 2022 – February 2023)

Massachusetts Emergency Management Administration (MEMA)

CohnReznick performs complex grant coordination, financial and programmatic compliance, technical assistance, and administration work to plan, organize, and monitor federally funded disaster grants within the Commonwealth of Massachusetts for COVID-19. Our team is responsible for applicant outreach, training, technical assistance, and performing project reviews. During this engagement, we have also developed a grant management system solution utilizing Commonwealth's SharePoint platform.

- Created Data dictionaries and Mapped Fields Used in the SharePoint App
- Assisted with the design, development, and maintenance of a grants management system using the Power Platform Power Platform Power Apps Forms that Supports Staff with managing Grants.

Consultant (May 2021 – March 2022)

Texas Department of Housing and Community Affairs (TDHCA)

CohnReznick assisted with TDHCA's Texas Rental Relief Program, helping facilitate the distribution of funds to renters facing hardship during the COVID-19 pandemic. CohnReznick was responsible for helping administer this program by reviewing applications submitted by tenants and landlords in the Neighborly system.

- Developed Power BI Reports to Track Program Progress and Ensured TDHCA's Policy Requirements are Met
- Identified Data Needs to Comply with TDHCA Policy
- Migrated Microsoft Excel Reports to Power BI and Automate the Refresh Process.



Brian Livian

Senior | CohnReznick Advisory LLC

BIOGRAPHY

Mr. Livian is a data scientist with expertise in statistical analysis, machine learning and AI, specializing in data-driven solutions for disaster recovery and grant management programs. He has supported HUD-funded initiatives, including CDBG-DR and CDBG-MIT programs, by implementing advanced data analytics, compliance monitoring, and process optimization. His experience includes developing tools for program administration, fraud detection, and policy alignment to ensure compliance with federal and state requirements.

EXPERIENCE

Data Science Senior (September 2024 – Present)

State of Louisiana Office of Community Development / Disaster Recovery Unit (OCD/DRU)

CohnReznick provides data analytics and compliance support for HUD-funded programs under the Community Development Block Grant Disaster Recovery (CDBG-DR) allocations to assist the state in long-term recovery efforts.

- Conduct geospatial mapping of disaster recipient addresses to support housing rehabilitation and infrastructure planning.
- Implement probabilistic record linkage using Fellegi-Sunter modeling with Splink to improve accuracy in disaster grant data matching.
- Lead comprehensive data preprocessing and quality assurance to minimize duplication and maintain integrity across millions of records.
- Design and deliver data reporting solutions using SSRS to provide stakeholders with actionable insights for compliance and program monitoring.

Data Science Senior (August 2023 – Present)

Port Authority of New York and New Jersey

Support compliance oversight for the \$13 billion John F. Kennedy International Airport Redevelopment Program by applying AI and data analytics to monitor contractor activity and detect potential fraud, waste, and abuse.

Proposed Labor Category

Reporting Specialist – Task Area 7

Proposed Task Areas

- 7. Needs Assessments, Market Analysis, and Geospatial Support

Education

- M.A., Mathematics, Katz School of Science and Health
- B.A., Mathematics, Queens College



- Apply data integration and linkage techniques to combine disparate datasets without unique identifiers, enabling oversight teams to identify irregularities and high-risk patterns.
- Use OCR and Document AI technologies to extract structured data from Certified Payroll Reports submitted in unstructured formats such as PDFs.
- Develop and maintain interactive dashboards that consolidate data from multiple sources, including payroll reports, contractor timekeeping systems, and field investigation findings, to support real-time compliance monitoring.
- Implement web scraping solutions to capture supplemental compliance data from dynamic online sources for enhanced monitoring and reporting.

Data Science Senior (October 2024 – March 2025)

New Jersey Department of Human Services

Support compliance and integrity for federally funded benefit programs by applying machine learning and statistical analysis to detect duplication of benefits and potential fraud.

- Identify and resolve duplicate benefit claims across thousands of records to prevent overpayments and strengthen program compliance.
- Apply advanced data processing and analytical techniques to improve accuracy and efficiency in detecting high-risk cases, ensuring timely intervention.
- Utilize scalable data solutions to manage large datasets and deliver actionable insights that support statewide monitoring and decision-making.

Data Science Senior (August 2023 – Present)

Office of the Governor of Texas

Support federal grant oversight and compliance monitoring for programs funded by IIJA, ARPA, CARES Act, and CAA by applying AI and data analytics to detect fraud, waste, and abuse.

- Develop and deploy AI-powered OCR solutions to extract structured data from large volumes of tax documents for grant validation and compliance review.
- Maintain and enhance fraud detection dashboards to provide real-time visibility into high-risk transactions and anomalies.
- Implement automated data collection processes, including web scraping pipelines, to aggregate thousands of data points from multiple sources for oversight and reporting.



Matthew Iwundu

Senior | CohnReznick Advisory LLC

BIOGRAPHY

As a certified Power BI Administrator with 3+ years of experience supporting Federal and state disaster recovery programs, I specialize in delivering data-driven solutions that align with CDBG-DR objectives of Providing grant management services, compliance and Monitoring, housing rehabilitation, Reconstruction, Home Replacement, environmental review and Re-imbursement for eligible rehabilitation expenses. My expertise includes designing and managing Systems of Record (SOR), integrating financial reporting platforms, and developing interactive dashboards that support program transparency and performance tracking. I have successfully led analytics initiatives using Power BI, SQL Server and SharePoint ensuring seamless collaboration with implementation vendors and state personnel. I have supported intake operations in disaster-impacted areas through real-time data collection and visualization. My approach emphasizes scalability, compliance, and responsiveness to evolving program needs, with full availability during standard business hours. I am committed to delivering measurable outcomes and continuous improvement in partnership with HUD Programs.

EXPERIENCE

Power BI Administrator/Reporting- (May 2022- Present)

RLHP Restore20 Disaster Recovery Program- Louisiana

I bring extensive reporting experience developed through my work on CDBG-DR Programs, where I designed and maintained performance dashboards and compliance reports using Power BI, SQL Server, and SSRS which provides real time data and ensures compliance with Federal regulations. My reporting solutions have supported over **\$1.2 billion** in grant disbursements, tracked KPIs such as application throughput, eligibility rates, and fund utilization, and enabled real-time insights for intake centers in Louisiana. I've implemented automated data pipelines and validation frameworks to ensure accuracy and timeliness, and collaborated closely with State agencies, and cross-functional technical teams to align reporting outputs with federal audit standards and program goals.

Proposed Labor Category

Reporting Specialist – Task Area 7

Proposed Task Areas

7. Needs Assessments, Market Analysis, and Geospatial Support

Education

- M.B.A- Marketing
- M.S. Operation Research
- B.S. Statistics

Certifications

- Data Analytics- Certified



Communication, Public Information, and Outreach Support – Task 14



D. Jordan Whichard IV

Vice President | NP Strategy

BIOGRAPHY

A seasoned leader, advocate, and strategist with experience across North Carolina state government, the private sector, the White House and campaigns, I've spent my career improving outcomes for stakeholders and optimizing the success of the organizations I lead. Helped lead North Carolina's response to the Covid-19 pandemic from the State Emergency Operations Center, and managed sensitive negotiations with the General Assembly and Congress.

EXPERIENCE

Project Lead (Key Personnel) - Task Area 14

Vice President (2025 – Present)

NP Strategy

- Serve on the Executive Leadership team for boutique strategic communications firm advising clients across the Southeast and the country in public affairs, stakeholder management, economic development, crisis communications, and more
- Manage the Raleigh office of NP Strategy and grow the firm's brand awareness in the Triangle Community.

State of North Carolina | Raleigh, NC 2017 – 2025

Chief Deputy Secretary (March 2021 - August 2025)

North Carolina Department of Commerce

- Provide strategic and operational leadership for state agency with over 1,200 state employees and over \$1 billion annual budget, all dedicated to the Department's mission to improve the economic well-being and quality of life for all North Carolinians
- Oversee operations of and actively advocates for five divisions across the agency
- Advises the Governor of North Carolina and Secretary of Commerce on matters related to economic development,
- workforce development, employment security, and rural prosperity while interfacing with a broad range of external audiences and stakeholders to share North Carolina's success and forward-looking strategies for continued economic growth and prosperity.

Proposed Labor Category

Proposed Task Areas

- 14. Communication, Public Information, and Outreach Support

Education

- B.A., Political Science; Management and Society, The University of North Carolina, 2007

Community

- Leadership North Carolina, Class XXXI
- Board of Directors, North Carolina Railroad Company (2021-2025)
- Board of Directors, North Carolina Global Transpark Authority (2021-2025)



Director of Intergovernmental Affairs (February 2017 - March 2021)

Office of The Governor of North Carolina

- Served the State of North Carolina under Governor Roy Cooper as a member of his senior leadership team and advisor on all matters related to the Office and Administration's interaction with the United States Congress, the White House, federal executive branch agencies, and local governments across North Carolina along with external stakeholders
- Lead a diverse team with direct oversight of the Governor's Washington, DC office, and three regional directors across North Carolina, responsible for ongoing communication with elected officials, staff, and stakeholders
- Managed relationships between the Governor's office and multiple cabinet agencies across state government.

Principal, Health & Welfare Consultant (2015 -2017)

Hill, Chesson & Woody | Durham, NC

- Provided clients with strategic advice and guidance surrounding the design, implementation, and management of the employee benefit programs that best support the strategic direction of their organizations
- Earned the designation of Group Benefits Associate (GBA) from the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.

Southern Regional Political Director (2014 – 2015)

Democratic National Committee (DNC) | Washington, DC

- Acted as principal liaison for the DNC to maintain open and effective communication between national agenda efforts and elected officials, state parties, candidates, allied organizations and stakeholders throughout the southern United States
- Utilized thorough knowledge of the regional political landscape in leading the development of political briefings for the President, Vice President, First Lady, cabinet secretaries and other top surrogates
- Advised the White House Office of Political Affairs, senior DNC officials, Democratic elected officials and campaign managers regarding Presidential involvement, budgeting, resource allocation and messaging.

Associate Director of Scheduling & Advance and Trip Coordinator (2009 – 2011)

The White House | Washington, DC

- Represented the White House in advance of and traveling with the President throughout the United States and abroad, while liaising with deployed advance teams
- Served as primary point of contact for the President's traveling party, managing schedules and logistics for a traveling party of 10 to 40 staff and officials, including members of Congress and Cabinet secretaries
- Served on Presidential Pre-Advance and Advance delegations abroad, negotiating with foreign governments and creating schedules for the President and delegation
- Traveled to countries on five continents - including wartime Afghanistan and Iraq – successfully implementing Presidential events in conjunction with host governments around the world
- Held Top Secret Security clearance.

Southern Regional Director for Intergovernmental Affairs & Outreach (2011 – 2012)

Democratic National Convention Committee (DNCC) | Charlotte, NC

- Managed the relationship between the DNCC and delegates from 14 Southern states and territories to include elected officials, national party stakeholders, and consulates of foreign governments



- Collaborated with State Democratic Parties to maximize experience and participation at the Convention and create the most open and accessible convention in history.

Deputy Director of Events & Ceremonies (2012-2013)

Event Manager (2008-2009)

Presidential Inaugural Committee (PIC) | Washington, DC 2009, 2013

- Managed a \$1.5 million budget and a staff of 16 in the planning and execution of events surrounding the 57th Presidential Inauguration
- Principal PIC representative in the planning and coordination of four Inaugural events to include the Candlelight Celebration at the National Building Museum and the National Prayer Service at the Washington National Cathedral
- Worked closely with representatives of the National Park Service, US Park Police, US Secret Service, DC Homeland Security and Emergency Management, and other Federal and local agencies to ensure success of for the public's viewing of the 56th Presidential Inauguration on the National Mall.

National Advance Staff (2007 – 2008)

Obama for America | Chicago, IL

- Served as Site Lead for 100+ events to include rallies, press conferences, town hall meetings, roundtable discussions and off-the-record stops for then-Senator Obama, Mrs. Obama and then-Senator Biden over the course of the primary and general elections.



Jesica Johnson Mackey

Vice President | NP Strategy

BIOGRAPHY

A seasoned leader, advocate, and strategist with experience across North Carolina state government, the private sector, the White House and campaigns, I've spent my career improving outcomes for stakeholders and optimizing the success of the organizations I lead. Helped lead North Carolina's response to the Covid-19 pandemic from the State Emergency Operations Center, and managed sensitive negotiations with the General Assembly and Congress.

EXPERIENCE

Vice President September 2019– Present) **NP Strategy Columbia, SC**

As a part of the NP Strategy Executive Leadership Team, I leverage my extensive background in municipal government to help clients navigate the intricacies of elected official relationships and government policies. To ensure organizations reach goals, I work to develop and implement strategic communication plans. My additional skills in strategic planning and project management range from ordinance changes to large scale economic and infrastructure projects.

- Provide senior-level communications and business strategy support for a diverse client portfolio
- Design and implement communications strategies utilizing video, social media, digital marketing, community and government relations
- Lead stakeholder coordination and conflict resolution (in-person visits, phone calls, email)
- Manage mid-manager and junior level communications staff and company internship program.

Senior Strategic Communications Coordinator (May 2015 – September 2019) **HDR Engineering Columbia, SC**

- Led small and large organizations helping to improve image and increase recognition, or public and political buy-in of their project, campaign or brand
- Developed and implemented marketing and communications plans that include target audience strategy, media relations and tracking,

Proposed Labor Category

Project Lead (Key Personnel) - Task Area 14

Proposed Task Areas

14. Communication, Public Information, and Outreach Support

Education

- M.P.A., University of South Carolina Columbia, SC, 2009
- B.A., in Journalism and Mass Communications, University of South Carolina, 2004

Professional Affiliations and Volunteer Activities

- EdVenture Children's Museum Board of Directors (2023 – present)
- South Carolina First Steps Board of Directors (2021 – present)
- Richland County Councilmember (2021 – present); Vice Chair (2022-2023); Chair (2024 – present)
- United Way of the Midlands Board of Directors (2020-2021)
- Women in Transportation Seminar South Carolina Chapter (WTS SC) (Board Member, 2019 – 2021)
- United Way of the Midlands Education Council (Chair, 2018 – 2021)
- Mental Illness Recovery Center, Inc. (Marketing Committee Volunteer, 2018 – 2020)
- Emerge South Carolina (Board of Directors, 2017 – 2019)
- Berkeley County Chamber of Commerce (Board Member, 2014 – 2016)
- Berkeley County First Steps (Board Member/Fundraising Chair/Vice Chair, 2013 – 2016)



collateral material development, comment response programs, event planning, overall activity schedule, information lines, contact databases, and reporting

- Responsible for development of outreach campaigns that include social media, digital ads, direct mail, newsletters, video production, events and public relations activities for local and state agencies
- Managed communications teams including communication specialists, multi-media designers, event planners, data managers, social media specialists and sub-consultants
- Oversaw standalone project contracts ranging from \$10,000 to \$500,000 and task orders on larger efforts for multi-million dollar programs
- Coordinated concept development, writing, editing and assisting in graphic coordination of marketing materials such as surveys, newsletters, websites, handouts, videos, advertisements, and press releases
- Facilitated public meetings, open houses, focus groups, workshops, advisory committees, and other stakeholder meetings
- Experience following National Environmental Policy Act (NEPA) regulations in a marketing environment.

Public Information Officer/Annexation Coordinator March 2010 – May 2015

City of Goose Creek, SC

- Served as primary media contact for City Departments and communication liaison for the Mayor and City Council
- Managed event coordinators, graphic designer and interns
- Produced and distributed press releases, news alerts and meeting agendas
- Designed layout and content for City's marketing materials, newsletter, annual report and special publications
- Maintained City's website and social media pages
- Directed City's economic development efforts to include managing economic development study and serving as staff to the City's Economic Development Advisory Committee
- Coordinated and promoted various citywide events to include annual golf tournament, Fall Festival, Holiday Lights, summer concert series, etc.
- Oversaw City's marketing budget and achieve marketing goals in a cost-effective manner
- Wrote sponsorship proposals, speeches and presentations for executive staff
- Worked with Planning Department to inform and influence community leaders on proposed infrastructure projects
- Communicated Citywide Emergency Preparedness evacuation plan to local media and residents.

Marketing Recruitment Manager (May 2009 – March 2010)

S.C. Governor's School for Science and Mathematics Foundation Columbia, SC

- Developed and executed recruiting plans for the S.C. Governor's School for Science and Math
- Traveled statewide recruiting high school students (public schools, private schools and homeschooled)
- Planned and implemented marketing strategy to increase applicants and awareness of school
- Created and managed all correspondence to prospective students
- Achieved Foundation recruitment goals in a cost effective manner
- Attended statewide professional conferences and career fairs for recruitment and school recognition
- Gave presentations at high schools, student organizations and career fairs throughout the state
- Planned statewide recruiting events and information sessions for prospective students
- Worked in coordination with the Public Relations Manager on website design, implementation and maintenance.



Advertising/Editorial Graduate Assistant July 2008 – May 2009
University of South Carolina – Office of Student Media Columbia, SC

- Worked with Director of Student Media to create budget and ensured student publications met budget guidelines
- Assisted in the completion of payroll and new hire paperwork for student employees
- Provided professional guidance to students involved with The Daily Gamecock student newspaper and Garnet and Black student magazine
- Developed and implemented an orientation and training program for newsroom staff on all USC campuses
- Assisted student newspaper and magazine public relations staff in promotion of publications and special events
- Provided advertising sales training to new employees
- Created and implemented high school recruitment efforts, alumni website and fundraising activities
- Conducted readership survey, analyzed results and developed improvement implementation strategies
- Increased readership survey participation by 503% through targeted marketing campaign
- Served as Co-Editor of Discover Carolina magazine, an orientation publication distributed to incoming freshman bringing in excess of \$27,000 annually.

Marketing and Events Coordinator (August 2005-August 2007)
Palmetto Parent magazine Columbia, SC

- Executed all special events including the Annual Camp and Education Fair, Annual Cover Kids Event, Annual Family Choice Awards, and Speaker Series
- Developed the company's first Family Choice Award event that was completely funded by donations
- Managed budget and ensured event goals were met with each event bringing in excess of \$10,000
- Secured corporate sponsorships, created marketing plans and promotional materials for all events.

AWARDS/RECOGNITIONS

- Live United Award, United Way of the Midlands (2021)
- Riley Fellow, Diversity Leaders Initiative (DLI) Riley Institute (2020)
- Columbia Business Monthly Best and Brightest 35 and Under (2018)
- Columbia Chamber of Commerce Leadership Columbia Graduate (2018)
- South Carolina Economic Development Institute Certification (2013)



Jeff Reeves

Manager | NP Strategy

BIOGRAPHY

Highly organized manager and digital producer with 10 years experience. Areas of expertise include digital content development, social media, and leadership. Tech-savvy communication leader possessing exceptional writing and editing skills. Versed in a range of communication solutions and technologies.

EXPERIENCE

Manager (Aug 2022 to Present)

NP Strategy - Raleigh, North Carolina

Executive Digital Producer (Aug 2016 to Aug 2022)

WNCN-TV - Raleigh, NC

- Supervise nine-member team responsible for gathering, producing, and posting digital content in a highly-competitive market.
- Interview, hire, and develop new team members.
- Managed digital team through multiple CMS transitions.
- Set all-time highs in monthly page views, video views and unique visitors on responsive sites; quadrupled news app usage in 2 years.
- Manage station's social media accounts. Developed and implemented current social strategies while optimizing practices using SocialFlow.
- Manage cbs17.com by developing and refining pages to enhance appearance and increase user experience.
- Streamlined workflow to increase efficiency of team performance and resource allocation.
- Utilize Google Analytics and Trends, Facebook, and Twitter tools/apps to gather data and understand audience activity and engagement.
- Maintain working relationships with digital teams and partnership companies in North Carolina.
- Collaborate with sales and marketing departments to ensure digital and content and strategies are aligned with business and brand goals.
- Awarded best news website in 2020 by RTDNAC.

Digital producer (June 2012 to Aug 2016)

WNCN-TV - Raleigh, NC

- Produced digital content using AP Style and WordPress to deliver news in a competitive market.

Proposed Labor Category

Communications Manager – Task Area 14

Proposed Task Areas

14. Communication, Public Information, and Outreach Support

Education

- B.A., Communications: Media, North Carolina State University



- Managed and provided content to increase views and drive traffic from station's social media accounts.

Production Technician (Mar 2006 to Apr 2012)

WRAL-TV - Raleigh, NC

- Managed and operated technical equipment used in live newscasts.
- Directed live and recorded weather and news-related content.



Mary Cullen

Manager | NP Strategy

BIOGRAPHY

Award-winning journalist turned global communications strategist with experience in media relations, crisis comms, and thought leadership.

Proven success managing large-scale campaigns for clients in varying industries. Adept at crafting compelling stories that elevate brand reputation and drive visibility.

EXPERIENCE

Manager (2021-Present)

NP Strategy - Raleigh, NC, USA

- Manage strategic media relations planning & execution
- Lead crisis response & reputation management
- Project manage a roster of 8 to 12 clients at a time
- Advise clients across tech, healthcare, education, nonprofit, government, & more
- Coordinate tasks for a team of producers, writers, designers, & strategic thinkers
- Serve as the Raleigh office lead for a team of 3 & manage in-office intern staff
- Mentor entry-level staff across all NP Strategy offices

Media Relations Manager (2020-2021)

Connect2 Communications - Raleigh, NC, USA

- Managed media relations for tech & telecom clients
- Crafted unique tech savvy pitches paired with current industry trends
- Developed client messaging through blogs, white papers, & press releases
- Managed relationship building with national trade & mainstream telecom media

News Reporter & Producer (2018-2019)

89.1WGLT PublicMedia - Normal, IL, USA

- Wrote daily news & award-winning depth reporting for web & broadcast
- Newscasted & served as local live host for All Things Considered program

Proposed Labor Category

Communications Manager – Task Area 14

Proposed Task Areas

14. Communication, Public Information, and Outreach Support

Education

- M.A., Public Affairs Reporting, University of Illinois Springfield
- B.S., News Editorial Journalism, Illinois State University, Technical Writing minor
- Study Abroad: Paris, France & Groningen, Netherlands

Awards

- 1st Place, 2020 Regional Edward R. Murrow, Investigative Reporting
- 1st Place, 2020 National PMJA, Investigative Reporting



- Received a Regional Edward R. Murrow Award for Investigative Reporting

Statehouse Political Reporter (2018)

NPR Illinois WUIS Public Media - Springfield, IL, USA

- Reported daily on the Illinois General Assembly session
- Composed in-depth feature and investigative reporting
- Built strong and positive rapport with Illinois state legislators & media personnel

Public Speaking Professor (2019)

Illinois State University - Normal, IL, USA

- Instructed college students on the basics of public speaking & communication
- Planned lessons, facilitated discussions & arranged engaging activities
- Succeeded in this role while reporting full-time at WGLT Public Media

Board Member: Secretary (2025), Programs Director (2024)

North Carolina Public Relations Society of America - Raleigh, NC, USA

- Appointed to serve as Programs Co-Director in 2024, in charge of member events
- Elected to serve as Board Secretary in 2025



Darain C. Ginyard

Creative Specialist | NP Strategy

BIOGRAPHY

Dynamic and results-driven marketing and creative professional with expertise in digital strategy, branding, and content development. Adept at building and maintaining relationships through strong interpersonal and communication skills. Passionate about integrating traditional and modern marketing techniques to drive brand awareness, engage audiences, and foster business growth. Proven ability to lead cross-functional teams, develop compelling visual content, and execute high-impact campaigns across multiple platforms.

EXPERIENCE

Creative Specialist (February 2022 – Present)

NP Strategy

- Collaborate closely with client teams to deliver strategic creative solutions, including graphic design, photography, and social media content development.
- Develop compelling visual and written content for client newsletters and social media platforms to enhance brand messaging.
- Oversee the creation and execution of external communication materials, ensuring brand consistency.
- Actively participate in strategy planning meetings to contribute creative insights and innovative marketing approaches.
- Coordinate freelance graphic designers, ensuring high-quality and timely deliverables.
- Serve diverse industries, including healthcare, technology, manufacturing, agriculture, government, energy, and community programming.

Contact: Jean Cecil Frick – Chief Operating Officer | 803-253-8232

Brand & Digital Coordinator (PRN) (October 2019 – Present)

Cooperative Health

- Assist in the development and execution of the organization’s annual marketing plan.
- Partner with the Director of Public Relations and Executive Officer to establish and analyze key performance metrics.

Proposed Labor Category

Graphic Designer - Task Area 14

Proposed Task Areas

- 14. Communication, Public Information, and Outreach Support

Education

- Master’s Degree in Mass Communications & Digital Marketing (4.0 GPA), Southern New Hampshire University (2020)
- B.S., in Exercise Science – Scientific Foundation, Minor in Psychology, University of South Carolina (2012)

Certification

- Google Ads Display Certification

Community Engagement

- Leadership Columbia (Class of 2026)
- Alex English/ Let's Share Foundation Celebrity Golf Tournament | Marketing Lead (2025)
- Vice Board Chair, One Columbia for Arts & Culture (2023 – Present)
- Board Member, ColaFW Alliance (2022 – Present)



- Design and implement strategic marketing initiatives to support business objectives and brand growth.
- Develop and enforce brand guidelines to ensure consistency across all marketing materials.
- Produce high-quality print and digital collateral, including promotional materials and event assets.
- Create and manage digital content across digital platforms, increasing audience engagement and brand awareness.
- Capture and produce photo and video content to support internal and external communication efforts.
- Oversee website design updates, manage Google Business accounts for 28 locations, and optimize SEO strategies to improve digital presence.
- Analyze website and social media performance data, providing actionable insights to leadership.
- Manage vendor relationships to produce branded merchandise and maintain marketing collateral inventory.

Contact: Jennifer Glover-Hawkins | 803-210-9588

Chief Marketing Officer (January 2022 – Present)

Columbia Fashion Week

- Lead and expand the marketing team, fostering creativity and innovation to align with business goals.
- Develop and execute comprehensive marketing strategies, driving brand visibility and audience engagement.
- Oversee the creation of content campaigns aimed at generating leads and enhancing brand recognition.
- Maintain an organized event calendar, conducting market research to optimize scheduling and maximize attendance.
- Build strong partnerships with local businesses and media outlets to enhance promotional efforts.
- Write and distribute press releases, coordinate publicity campaigns, and organize high-impact promotional events.
- Develop pricing strategies for ticket sales and sponsorships, maximizing revenue opportunities.
- Manage advertising campaigns across multiple channels, including social media, print, and digital media.
- Lead the design and development of marketing materials, including the COLAFW Digital Magazine and social media assets.
- Implement data-driven social media strategies to increase engagement, following, and community interaction.

Contact: Juliette Muller – Executive Director | 803-603-3860

Formalwear Manager (June 2011 – January 2020)

The Men's Wearhouse

- Managed rental department operations, overseeing a team of 4-12 employees to ensure smooth execution of services.
- Led community outreach and marketing initiatives to drive brand awareness and local engagement.
- Served as Bridal Show Leader and Coordinator, organizing promotional events and strengthening partnerships within the wedding industry.
- Managed staff scheduling and workload distribution to optimize efficiency and service quality.
- Oversaw inventory management, ordering supplies, and ensuring timely fulfillment of customer rentals.
- Delivered high-level customer service, resolving issues and enhancing client satisfaction.
- Generated and analyzed rental business reports to drive operational improvements and sales growth.
- Provided employee training and mentorship, ensuring team members met performance and service standards.



Maryanne Grinnell

Communications Specialist | NP Strategy

BIOGRAPHY

Maryanne is highly proficient in Adobe Creative Suite including InDesign, Photoshop, Premiere Pro. And has experience in Brandcast, Wordpress, Agorapulse Hubspot, Mailchimp, Activecampaign, Canva, Smartsheet, Hootsuite, Meta, Google Analytics, Asana.

Maryanne skilled in graphic design, video production, social media management & advertising, podcast management, email marketing, digital newsletters, website development/design, data reporting. Maryanne has industry experience in strategic communications, public relations, podcasting, commercial real estate and marketing.

EXPERIENCE

Communications Specialist (Mar 2024– Present) NP Strategy

- Guide clients in integrated communication strategies to promote brand awareness
- Produce digital media to support social media initiatives and websites
- Create and manage social media campaigns, e-newsletters and KPIs to drive client success
- Support client blog programs by writing, publishing and promoting content to engage target audiences

Marketing Coordinator (Jan 2024 - Mar 2024) Colliers South Carolina

- Led the Columbia retail brokerage marketing strategies and digital ad campaigns
- Managed statewide social media program to drive engagement and promote key initiatives
- Authored and distributed press releases, supporting media relations
- Supported ad campaigns for commercial properties on the market, generating leads for sales and leases.

Proposed Labor Category

Graphic Designer - Task Area 14

Proposed Task Areas

- 14. Communication, Public Information, and Outreach Support

Education

- B.S., in Business Administration, Marketing
University of South Carolina

Awards

- Graduate of Seasons Leadership Program (2021)
- Top Sales & Marketing Business Award, Ascension (Q1 2021, Q4 2020)
- Certified Professional SalesPerson, national Association of Sales Professionals (2020)



Marketing Assistant (Nov 2021 - Jan 2024)

Colliers South Carolina

- Created and managed digital content for commercial real estate social media, websites and marketing campaigns to tell compelling stories and engage target markets
- Designed visual assets to support print and digital communications, including property proposals, presentations and advertising campaigns
- Managed event planning and logistics for groundbreaking ceremonies, ensuring smooth execution and positive public engagement.

Marketing Manager (Aug 2020 - Nov 2021)

Ascension Transformation Solutions

- Managed integrated marketing strategies and ad campaigns
- Led the development of proposals, presentations, and consulting materials
- Produced digital media, including websites and podcasts, to support social media initiatives and enhance client engagement.



Maya Ward

Manager | NP Strategy

BIOGRAPHY

Public relations manager with 8+ years of experience driving strategic communications that elevate brand reputation and boost media engagement. Skilled in leading high-performing teams and leveraging creative storytelling to secure impactful media placements.

EXPERIENCE

Manager (January 2025 – Present)
NP Strategy, Charlotte, NC

- Cultivate strong relationships with clients, providing strategic counsel and executing comprehensive communication plans that are aligned with business objectives.
- Secure high-impact media placements resulting in millions of media impressions monthly.
- Draft and edit a wide range of communications materials, including press releases, media advisories, op-eds, pitches, and key messaging documents.
- Serve as the primary liaison between clients and journalists, managing press interviews and facilitating successful media opportunities.
- Leverage media monitoring and analytics tools to track campaign performance, generate client reports, and inform future strategies.

Public Relations & Internal Communications Manager (March 2022 - December 2024)
DKMS, Charlotte, NC

- Lead national public relations strategy, securing 30+ media hits monthly, valued at \$1.8M+ in ad exposure.
- Developed press releases and pitched stories to the media, securing coverage in top outlets like the Today Show, NBC Nightly News, and People.
- Strategized and implemented a data-driven communications plan driving 1,100% growth in media impressions year-over-year.
- Wrote speeches and coached spokespeople for consistent, positive DKMS brand representation in the media and at public appearances.
- Collaborated cross-departmentally to shape effective internal and external communication for key stakeholders across the organization.

Proposed Labor Category

Outreach Specialist – Task Area 14

Proposed Task Areas

14. Communication, Public Information, and Outreach Support

Education

- B.S., in Psychology, Wofford College
- B.A., in Philosophy, Wofford College

Certifications

- PR Media Relations and Media Monitoring, Meltwater
- Social Media and Digital Marketing, HubSpot Academy
- Crisis Communications, LinkedIn Learning



- Served as a team lead providing mentorship and support to members of the Marketing and Communications department.

Communications & Development Associate (October 2019 - March 2022)

Women's Rights and Empowerment Network, Columbia, SC

- Pitched compelling stories to the media to raise awareness of WREN's mission and legislative activities, resulting in increased media coverage and public engagement.
- Managed the website and all social media channels, growing followers by 18.6% and ensuring 22,000+ followers were engaged and informed.
- Developed copy and designed infographics to engage the public across all digital channels including blogs, monthly e-newsletters, and social media.
- Supervised and mentored a communications intern, providing guidance on content creation and digital strategy development.

AmeriCorps VISTA (June 2018 - July 2019)

BirthMatters, Spartanburg, SC

- Implemented community outreach strategies, resulting in a 34% increase in social media followers.
- Coordinated a team of 64 volunteers, contributing over 600 volunteer hours for events and fundraisers.
- Planned fundraising events and successfully wrote grants, securing over \$45,000 in funding.



Margaret “Annie” Howie

Strategic Communications Specialist | NP Strategy

EXPERIENCE

Strategic Communications Specialist (April 2023 –Present)

NP Strategy, Charlotte, NC

- Crafting compelling messaging, editorials, talking points, website content, video scripts, media pitches, and press releases to share clients’ stories at a national level across all digital platforms
- Driving stakeholder and community engagement initiatives for economic development projects throughout the Southeast, informed by in-depth community and media sentiment analysis
- Orchestrating impactful events, including press conferences, ribbon-cutting ceremonies, and community engagement events to maximize media exposure and create lasting impressions
- Supporting crisis communication efforts to protect brand reputations during critical moments
- Expertise in fast-paced agency with complex energy, manufacturing, mining, & data center clients.

Marketing Coordinator (March 2021 – April 2023)

Rikard and Protopapas, LLC, Columbia, SC

- Established first in-house marketing role to improve brand recognition in a saturated market
- Spearheaded a full brand transformation, redesigning the logo, website, mission statement, and marketing materials, then launching a multi-platform campaign to introduce the new identity
- Managed the firm’s website, SEO, and digital ads through thoughtfully crafted blogs and storytelling
- Tailored a robust marketing strategy incorporating community partnerships, email marketing, social media, sponsorships, client retention initiatives and case-specific sub-websites.

Page, House of Representatives (January 2019 – March 2020)

South Carolina Statehouse, Columbia, SC

- Improved constituent relations by answering calls on behalf of Representatives, addressing immediate concerns, conveying messages to Representatives, and following up with those needing more help.

Proposed Labor Category

Outreach Specialist – Task Area 14

Proposed Task Areas

14. Communication, Public Information, and Outreach Support

Education

- B.S., Business Administration, Moore School of Business, University of South Carolina, 2021

Certifications

- WordPress, Adobe Creative Cloud Apps, Canva, Hootsuite, MailChimp, Salesforce, Microsoft Office, POS. Certified in Google Ads Search, Analytics & Digital Marketing; Certified Professional Salesperson (NASP)



Marketing & Sales Intern (June 2019 – October 2019)

Riddle & Bloom, Columbia, SC

- Developed a Salesforce database to track my cold calls and execute 50+ high school sporting events for the client's target audiences across the country

Sales Associate (April 2019, April 2022 (Seasonal))

Augusta National Golf Club, Berckmans Place, Augusta, GA

- Delivered advanced customer service to uphold the Masters Tournament's exemplary service standards while interacting with thousands of international patrons during 14-hour days.

Manager (January 2015 – May 2022)

Broadcloth Boutique & Page 6 Boutique(s), Fort Mill, SC

- Facilitated the opening of a third boutique and the launching of the new location's rebrand
- Created content for social platforms to engage with a 65K following of various ages and interests.

Specialized Support – Tasks 11 and 17



Susan M. Ruinen

Civil Engineer V | Michael Baker International

BIOGRAPHY

Ms. Ruinen has managed numerous infrastructure projects including road design projects, enhancement projects, and feasibility studies. She has much experience in the various phases of the project lifecycle including project management, alternatives analysis, benefit cost analysis, public relations, traffic analysis, preliminary design, final plans preparation, bidding, and award.

Ms. Ruinen will provide local support to the project. She will bring the exemplary organizational skills she has developed over the past 30+ years in the industry and will act as a local liaison. In addition to the long-term relationships, she has developed with her clients, coworkers, and subconsultants, she has recently worked with the South Carolina Department of Education on the update to the South Carolina Office of School Facilities Planning and Construction Guide and the new Office of School Facilities Policy and Procedures Manual.

EXPERIENCE

Program Manager

Grant Administration Services, Alabama, Georgia, Mississippi, South Carolina, North Carolina, and Virginia, Statewide. Southeast Crescent Regional Commission

Responsible for project delivery and management of subconsultants. Ensures project progress and that milestones are met. Reviewed 58 grant applications for Alabama, DC, Georgia, Mississippi, North Carolina, Virginia and South Carolina. The reviews provide feedback on engineering, construction and environmental aspects of the projects.

Michael Baker is providing construction management and administration services across Alabama, Georgia, Mississippi, South Carolina, North Carolina, and Virginia for this State Economic and Infrastructure Development grant program. The scope includes application review, environmental review of records, preparation of basic agency letters, review of plans and specifications, issuance of the notice to bid, review and recommend for approval of requests for payment, monitoring of project files and process, assistance with project files and close-out, assistance

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- M.Eng., 1994, Civil Engineering/Transportation, Clemson University
- B.S., 1991, Civil Engineering, Clemson University

Certifications

- Professional Engineer, South Carolina, 1999, 19497
- Professional Engineer, North Carolina, 2019, 049307
- Professional Engineer, Virginia, 2019, 061304
- Road Safety Professional, Level 2 (RSP2), USA and Canada, 2021, 98

Professional Affiliations

- American Society of Highway Engineers (ASHE)
- Institute of Transportation Engineers (ITE)



with application review, ensuring project compliance with federal and state rules and regulations, and offering technical assistance through the life of the project.

2024 Kershaw Resurfacing, Kershaw County, South Carolina. Kershaw County

Michael Baker is providing engineering expertise services in a support role to Kershaw County staff. Michael Baker provides engineering review and advisement to multiple departments in Kershaw County, including the Planning and Zoning and Public Works. The focus of these support services is to review developer plans from conceptual sketch plans through final construction plans for compliance with Kershaw County and South Carolina Department of Transportation design standards. Michael Baker staff is able to co-locate to Kershaw County offices and project sites, as needed, to provide these services to the client. Weekly status meetings are held at the Kershaw County offices to review and discuss the developers' plans and any design issues identified in a collaborative environment. On-site meetings are held to review construction problems that arise within new developments in Kershaw County, and Michael Baker provides the appropriate staff members to advise on solutions as the County's representative.

Project Manager. Zone 2 Coordinator

Transportation Enhancement Program Support, Statewide, South Carolina. South Carolina Department of Transportation

Responsible for the SCDOT Enhancement Program that funds streetscape improvements throughout the state, provided assistance to DOT in the administration of the program. Michael Baker provided technical support to the department's Enhancement Program Outreach Office for the implementation of the transportation enhancement program. Michael Baker's services included project management, grant application assistance and review, environmental compliance services, site inspections, workshop facilitation support, agency coordination, and customer service.

Project Manager

ADA Bergan Road Pedestrian Underpass, Greenway Trail, North Augusta, South Carolina. City of North Augusta

Responsible for design and management of all elements of this project. Michael Baker provided a revision to the original design for the Greenway Extension, a continuation of the city's existing seven-mile Greenway system. The project included a 12-foot-wide asphalt-paved bicycle and pedestrian trail constructed on a former railroad right-of-way that was revised to meet American Disability Act (ADA) requirements using a system of ramps and railings. This project required extensive coordination with South Carolina Department of Transportation.

Project Manager

North Augusta Greenway Extension and Underpass Design, North Augusta, South Carolina. City of North Augusta

Responsible for design and management of all elements of this project. Michael Baker provided design services for the extension of the North Augusta Greenway. The extension includes a pedestrian/bicycle underpass at Bergen Road. The underpass was constructed using a pre-cast 10-foot-by-10-foot box culvert. The project limits extend from I-20 north to Broxten Drive. The project included a wetland investigation, surveys, a CE-A reevaluation, path design, drainage design, structural design, geotechnical work, utility coordination, and final design plans and specifications. This project falls under SCDOT's Local Public Agency (LPA) process and required extensive coordination.

**Senior Engineer****South Downtown Sewer Replacement On-Call Engineering Services, Greenville, South Carolina. City of Greenville, South Carolina**

Provided guidance to staff on highway standards. Michael Baker is performing professional and engineering services for civil, infrastructure, transportation, and highway engineering projects. Under this on-call project, Michael Baker provided work on the Street Resurfacing and Road Diet, South Downtown Sewer Improvements, Design Services for New Sidewalks, and On Call Bridge Design, Load Rating, and Repair projects.

Project Manager**Spartanburg County On-Call Engineering Services FY 22 and FY 23, Spartanburg, South Carolina. Spartanburg County**

Responsible for project organization and management including supervision of drainage design and utility coordination. Engineer of Record for the roadway plans. Responsible for all required permitting. Michael Baker is serving as an on-call consultant to perform roadway, bridge, and general civil design for Spartanburg County Public Works and the Community & Economic Development Departments. To date, tasks have included bridge inspection, load ratings, bridge analysis and repair, roadway design, drainage and erosion control, utility coordination, permitting and traffic control.

Project Manager**County Road Index and Field Inventory. Marlboro County**

Responsible for the development of a road index for all county and secondary roads. Marlboro County has 757 miles of roads. Michael Baker was responsible for completing a field inventory of those roads, developing a criteria for which to prioritize them for the county, and compiling the data into a format which aided the Marlboro CTC when choosing upcoming projects.

QA/QC Engineer**North Maple Street, North Maple Street, Summerville, South Carolina. Town of Summerville, South Carolina**

Provided a quality review of the final plans. Michael Baker is providing engineering services for the preparation of the final roadway construction plans and is providing construction administration for the 1.4-mile widening of North Maple Street (S-131) from Parsons Road (S-59) to the end of the North Maple Street Extension. The focus of this project involves widening the existing two-lane roadway to three lanes from Parsons Road to U.S. 78, and to five lanes from U.S. 78 and North Maple Street Extension. This project also requires realignment of Parsons Road to create a four-leg intersection.

Senior Engineer**Riverfront Canal Repair, Columbia, South Carolina. City of Columbia**

Provided assistance to drainage subconsultant with GIS information. Michael Baker is providing multi-discipline engineering services for the complete assessment and design on a design-bid-build project for restoration of the Columbia Canal. Michael Baker's services include project management; civil, hydrologic, structural, and environmental assessments; restoration design; and construction administration. The proposed canal reconstruction and new water intake facility will both have adverse effects on the National Register-listed Canal and associated archaeological sites. The project requires extensive coordination with government agencies including the Federal Emergency Management Agency, the Federal Energy Regulatory Commission, South Carolina Department of Health and Environmental Control, South Carolina Fish and Wildlife, South Carolina Department of Natural Resources, and the South Carolina Historic Preservation Office.

**Project Manager****Secondary Road 25 Year Maintenance Cost Analyses, Anderson County, South Carolina. Anderson Regional Airport**

Responsible for project management and analysis of maintenance cost for Anderson County. Michael Baker provided an engineering analysis of Secondary roads within Anderson County in order to determine the annual cost to maintain these roads. The project consisted of the preparation of a report outlining the projected 25-year annual cost to Anderson County to perform the required routine maintenance on roads with an ADT lower than 10,000. This project had a very aggressive schedule only allowing one month for completion.

Senior Engineer**Road Inventory and Prioritization, Kershaw County, South Carolina. Kershaw County**

Responsible for providing guidance on project prioritization for a roadway database. Michael Baker provided engineering services to create a road inventory of the roads on the current petition list for paving for Kershaw County and prioritized them based on agreed upon criteria from the County Transportation Committee. Michael Baker researched, visited, inventoried, and photographed the 64 roads on the petition list in the county. The number of residences, bridges, dams, connectivity, school bus usage, mail delivery, schools, and churches were noted for each facility for use in ranking.

Project Manager**Lexington Medical Center Adaptive Signalization, Lexington County, South Carolina. Lexington Medical Center**

Responsible for design and management of all elements for this project. Michael Baker provided engineering services required to complete the installation of InSync signals through project closeout and successful turnover to the town of Lexington and South Carolina Department of Transportation (SCDOT). Lexington Medical Center, the town of Lexington, and SCDOT installed adaptive traffic signalization on 10 intersections along the Sunset Boulevard (U.S. 378) corridor extending from the intersection of Hebron Road to the intersection of Hummingbird Drive. Services included project management, surveying, adaptive signal design, permitting, utility coordination, right-of-way acquisition, cost estimating, project procurement, and construction engineering and inspection. The Town of Lexington received a 2020 Municipal Achievement Award for this Adaptive Signalization System which uses cutting edge technology to improve traffic flow and decrease travel time.

Project Manager**Adaptive Traffic Signals Design, Lexington County, South Carolina. South Carolina Department of Transportation**

Responsible for managing the design staff and assuring schedules are met. Michael Baker provided right-of-way and design services for 12 traffic signal upgrades at intersections to accommodate adaptive traffic signal system equipment. Michael Baker verified existing right-of-way at all identified locations and identified locations where right-of-way acquisition services were necessary. Michael Baker performed site visits; prepared signal plans that identified the location of signal poles, pedestrian poles, signal heads, pushbuttons and signs, sidewalk ramps, pull boxes, conduits, pavement markings, and loops; and provided pay items and quantities. Michael Baker also coordinated with adaptive traffic signal system vendors to ensure all necessary design elements were included in the signal plans. The Town of Lexington received a 2020 Municipal Achievement Award for this Adaptive Signalization System which uses cutting edge technology to improve traffic flow and decrease travel time.



Assembly Street Benefit Cost Analysis, Columbia, South Carolina

Computed benefit-cost ratios for four alternatives to determine which route provided the most benefits to the motoring public. A sensitivity analysis was also completed. The improvements include roadway and railroad projects.

Adjunct Professor (2015 to present)

University of South Carolina, Columbia, South Carolina, ECIV 541- Highway Design

As a professor, teaches highway design to seniors and graduate students majoring in Civil Engineering. ECIV 541 is designed to provide students with an introduction to the field of geometric design for Highway Engineering. The scope of the course includes various topics pertaining to design of transportation facilities using relevant tools and guidelines with emphasis on physical and operational aspects of arterials, freeways, intersections, and interchanges, including geometry, capacity, control, and safety.



Justin S. Blackman

Civil Engineer III | Michael Baker International

BIOGRAPHY

In his current role as a Civil Associate, Justin draws on his experience in the field performing construction and inspection of infrastructure projects, and incorporates that knowledge into his ability to analyze the requirements and designs for cost effectiveness and potential cost savings. Justin is adept at preparing cost estimates and quantities development of various infrastructure projects.

EXPERIENCE

Engineer

Bridge No. 54 Replacement, Mecklenburg County, North Carolina. North Carolina Department of Transportation

Responsible for assisting the project managers with the production of roadway plans throughout various stages of design. My responsibilities included generating horizontal and vertical alignments, 2D design and labeling, plan sheet and profile sheet layout, corridor modeling, cross section production, and calculating quantities. Michael Baker is providing engineering and environmental services for the replacement of Bridge No. 54 on NC 160 in Mecklenburg County, North Carolina.

Engineer

Extension of NC 148 - C.F. Harvey Parkway, Lenoir County, North Carolina. North Carolina Department of Transportation

Assisted with plan clean-up and quantity calculation in the final stages of design. Michael Baker provided comprehensive engineering services for the extension of NC 148 (C.F. Harvey Parkway) from NC 58 to NC 11. Michael Baker's services included project management, preliminary and final roadway design, structure design, utility coordination, environmental permit acquisition, transportation management plans, pavement marking, traffic signal design, and signing design.

Engineer

Dutchman Estates Paving, Wake County Government

Developed an estimate for the Dutchman Estates HOA to improve Van Gough Lane to NCDOT standards. The improvements would consist of

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 2018, Engineering Drafting Technology, North Carolina State University



pavement repair and resurfacing, clearing ROW areas, and cleaning out drainage pipes.

Engineer

NCDOT R-3603A. North Carolina Department of Transportation

Assisted in quantity calculations for 2 different options for the widening of NC-127.

Field Technician

Lochill Farm Stream Mitigation Site, Orange County, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Responsible for assisting the Cary, NC Stream group with wetland restoration by planting trees within the conservation easement, cutting back invasive plant species, and monitoring vegetation plot growth. Also assisted with various maintenance activities onsite including repairing a broken water line under the stream. Michael Baker is providing environmental engineering services for the restoration, enhancement, and preservation of nine stream reaches, totaling approximately 5,500 LF of existing streams that are part of the Lochill Farm project drainage area. The project will provide stream mitigation credits in the Neuse River Basin, approximately 5 miles northeast of the Town of Hillsborough. The project involves the restoration, enhancement, or preservation of stream, wetland, and riparian buffer functions along Finches Branch and unnamed tributaries to Finches Branch. Finches Branch flows into Buckwater Creek, which is listed as a Water Supply Watershed (WS-IV) and Nutrient Sensitive Water.

Civil Associate

Surrett Drive Widening, Randolph and Guilford Counties, North Carolina. North Carolina Department of Transportation

Responsible for assisting the project managers with the production of roadway plans throughout various stages of design. My responsibilities included generating horizontal and vertical alignments, 2D design and labeling, plan sheet and profile sheet layout, corridor modeling, cross section production, and calculating quantities. Michael Baker provided planning, engineering, and design services to widen Surrett Drive and improve its intersections. Surrett Drive is an important north-south route through Randolph County connecting I-85 to Business I-85 and High Point. Michael Baker's services included data collection, scoping, coordination activities, development of alternative concepts, capacity analysis, natural resource surveys and a NRTR, public involvement, right-of-way plans, environmental documentation, roadway design, utility coordination, signalization, traffic phasing, and railroad coordination.

Civil Associate

R-5735 - U.S. 19/74/64/129 Improvements, Cherokee County, North Carolina. North Carolina Department of Transportation

Assisted with basic design task and helped to calculate quantities throughout the ROW and final design phases. Michael Baker completed the design for improvements to a 1.2-mile section of U.S. 19/74/64/129 in Cherokee County. The project included the modernization of the existing five-lane facility with wider lanes and congestion relief design components. Components incorporated to relieve congestion include a connector road to the parallel Old Ranger Road to allow traffic from downtown Murphy to bypass a highly congested commercial section of the corridor.



Field Technician

Thomas Creek Restoration, New Hill, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Assisted the stream restoration group in surveying stream cross sections as a part of their yearly monitoring. As part of a full-delivery project, Michael Baker restored 4,721 linear feet (lf) and enhanced 3,948 lf of perennial and intermittent tributaries to Thomas Creek, a significant tributary to the Harris Lake reservoir. The streams had been impaired from past agricultural conversion and cattle grazing. The project involved restoring or enhancing nine headwater tributaries with a combined drainage area of 246 acres. Rosgen Priority Level 1 and 2 Restoration design approaches were utilized to restore stream access to an active floodplain. The restored riparian buffers adjacent to the streams are protected through a 23-acre permanent conservation easement with fencing that excludes livestock.

Civil Associate

HE-0013 Leap Frog TO 2. North Carolina Department of Transportation

Responsibilities for this project included incorporating.



Brent Schleck

Task Order Manager, Senior Environmental Planner |
Michael Baker International

BIOGRAPHY

Brent is a Senior Environmental Planner with thirteen years of experience assisting in and managing the preparation of environmental compliance documentation in accordance with the National Environmental Policy Act (NEPA). Currently, Brent assists in and manages the preparation of environmental documentation in accordance with NEPA, such as Environmental Assessments and Categorical Exclusions for residential, industrial, institutional, and mixed-use projects throughout the Country. Brent has also conducted specialized NEPA training programs for client agencies to instruct them how to complete environmental documentation for HUD programs pursuant to 24 CFR Part 58, such as CDBG and HOME Investment Partnership programs.

Prior to joining Michael Baker, Brent worked for the National Oceanic and Atmospheric Administration as a federal contractor preparing NEPA documentation for federally funded projects through the Nation Ocean Service and the National Marine Fisheries Service.

EXPERIENCE

Team Lead

NEPA documentation (24 CFR Part 58) for HUD-funded CDBG- and HOME Investment Partnership Projects

Brent leads a team of NEPA practitioners who prepare NEPA categorical exclusions, categorical exemptions, environmental assessments, and ERRs pursuant to 24 CFR Part 58 for HUD-assisted projects through the CDBG, HOME Investment Partnership, and Community Project Funds (CPF) programs. These environmental documents include public park facilities and infrastructure improvements, residential rehabilitation programs, and affordable housing construction. Specifically, Brent has prepared NEPA documentation for the following cities/jurisdictions:

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- M.U.P., 2012, Environmental Planning, University of Michigan
- B.S., Biology, Purdue University, Minor in Spanish, 2010

Professional Affiliations

- Association of Environmental Professionals (AEP)

**Nationwide:**

- South Carolina Office of Resilience
- City of Atlanta, GA
- City of Bethlehem, PA
- City of Allentown, PA
- Delaware State Housing Authority

California:

- City of South San Francisco
- City of Oakland
- City of Union City

- City of Cupertino
- City of San Leandro
- City of Palo Alto
- Sonoma County
- City of Santa Rosa
- Contra Costa County
- City of Lakeport
- Sacramento Housing and Redevelopment Agency
- City of Long Beach
- City of Orange

- City of Santa Ana
- City of Palm Desert
- City of Garden Grove
- City of Pasadena
- City of Santa Clarita
- City of Redondo Beach
- City of Rosemead
- City of Norwalk
- City of Huntington Park
- Covina Valley Unified School District

Environmental Task Lead**South Carolina Office of Resilience Hurricane Helene HUD NEPA Assistance. South Carolina Office of Resilience.**

Prepared tiered environmental assessments for the South Carolina Office Resilience's Hurricane Helene Housing Program in five South Carolina counties, including Abbeville, Anderson, Oconee, Pickens, and Laurens Counties. The Program included rehabilitation activities, relocation, reconstruction, and property buyouts. In addition, Michael Baker prepared templates for Tier II site-specific reviews and coordinated with local, state, and federal agencies to obtain feedback on the proposal as it relates to the federal laws and authorities required to be addressed by HUD.

Project Manager**NEPA documentation (24 CFR Part 58) for HUD-funded CDBG Projects. CohnReznick, Responsible Entity: City of Atlanta Department of Grants and Community Development.**

Brent is managing preparation of EA/FONSI sections, categorical exclusions, and environmental review records (ERRs) pursuant to 24 CFR Part 58 for HUD-assisted projects related to minor home repair programs, affordable housing construction, and residential rehabilitation programs for the City of Atlanta. Project highlights include:

- 557 Lindsay Street Multifamily Affordable Housing Project EA/FONSI.
- Ralph David House - 277 Moreland Avenue Motel Conversion EA/FONSI.
- Residences at Chosewood Park Affordable Housing Project EA/FONSI.
- Gorman and Company/Sweet Auburn Affordable Housing Project EA/FONSI
- Quest/The Simpson Project Affordable Housing Project EA/FONSI
- Sylvan Hills Affordable Housing Project EA/FONSI

Project Manager**280 Ramona Affordable Senior Housing Project EA/FONSI and CEQA Exemption. City of Pasadena, CA**

Brent is managing preparation of an EA and CEQA Class 32 Categorical Exemption report for the Ramona Affordable Senior Housing Project. The Project proposed to construct 111 units of affordable senior housing within the Civic Center Historic District in Pasadena, in immediate proximity to local landmarks such as an historic YMCA building, YWCA building, and Pasadena City Hall. As part of the NEPA and CEQA documentation, Michael Baker is preparing an Air Quality Technical Study to quantify construction and operational emissions, as well as a Noise analysis to determine compliance with HUD's noise guidelines.



Project Manager

West Creek Park Rehabilitation Project CEST. City of Santa Clarita, CA

Brent managed preparation of a CE statutory checklist, per 24 CFR 58.35(a), which demonstrated compliance with the Federal environmental laws and authorities listed at 24 CFR 58.5 for a project that proposed to rehabilitate an existing park facility (West Creek Park) located on the northwest side of the City of Santa Clarita. Specifically, the project consists of the removal of approximately 5,200 square feet of existing play area and the construction of a new inclusive play area. As part of the NEPA environmental document preparation, Michael Baker prepared a cultural resources identification and evaluation study to address requirements of Section 106 of the National Historic Preservation Act.

Senior Environmental Planner

City of San Leandro HUD NEPA Assistance for the Community Development Department. City of San Leandro

Coordinated with the City to perform an audit of the uploaded environmental reviews and associated documentation to the HUD Environmental Review Online System (HEROS) and rectify the potential gaps by updating the documentation.

Project Manager

Inn by the Coliseum Affordable Housing Project EA/FONSI. Danco Communities. Responsible Entity: City of Oakland, CA

Brent managed preparation of an EA/FONSI for the conversion of two commercial motel buildings to a residential use (affordable/supportive housing for households experiencing homelessness), rehabilitation of the buildings and construction of a one-story structure within an existing surface parking lot in the southern portion of the Project Site. In addition to the EA/FONSI, Michael Baker International prepared a cultural resources identification and evaluation study to address requirements of Section 106 of the National Historic Preservation Act.



Candice Mahoney

Senior Grant Manager | Metric Consulting

BIOGRAPHY

Ms. Mahoney 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.

EXPERIENCE

Senior Grant Manager (07/2024 – Present) Louisiana Office of Community Development

- **City of West Monroe:** CDBG compliance and project implementation for LWI Round 2 drainage project.
- **Village of Clarence:** CDBG compliance and project implementation for LWI Round 2 drainage project.

Senior Grant Manager (01/2018 – 06/2024) HUD Entitlement, CDBG-DR, and Treasury Funds, City of Baton Rouge, Parish of East Baton Rouge

Developed policies and procedures for all aspects of entitlement programs and ensured program compliance with applicable grant requirements. Provided general technical assistance on all entitlement and disaster recovery programs.

Senior Grant Manager (05/2023 – 06/2024) CDBG-DR RCIP, CDBG-DR Funds, Calcasieu Parish

Assisted in preparing multiple project applications for RCIP funding.

Senior Grant Manager (01/2015 – 05/2024) Isaac and RCIP, CDBG-DR Funds, Plaquemines Parish

Administered all aspects of a Parish-wide housing rehabilitation program, including case management, community outreach, environmental reviews, requests for payments, implementation of policies and procedures, application and budget preparations, technical assistance and monitoring visits. Served as lead grant manager for the Parish’s Resilient Communities Infrastructure Program (RCIP) Recovery Proposal and project application process.

Proposed Labor Category

Project Lead (Key Personnel) – Task Area 17

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
5. Claims, Appeals, and Case Reviews
8. Program Performance Monitoring and Evaluation
12. Training, Technical Assistance, and Capacity Building
13. Relocation Program (URA/TRA) Development and Compliance Support
15. Grant Management
17. Environmental Review

Education

- M.H.A., Healthcare Administration, University of Houston at Clear Lake
- B.A., Political Science, Louisiana State University



Senior Grant Manager (07/2022 – 04/2024)

CDBG-DR Funds, City of Lake Charles

Prepared environmental assessments for infrastructure and public facility projects. Assisted in the development of the CDBG-DR Action Plan.

Senior Grant Manager (07/2023 – 03/2024)

LWI Program, CDBG-DR Funds, St. Charles Parish

Prepared Environmental Assessment for LWI drainage project.

Senior Grant Manager (06/2022 – 05/2024)

LLOP Program, CDBG-CV Funds, Tensas Parish

Prepared project application for Love Louisiana Outdoors Project. Prepared requests for payment, assisted in construction bid process, completed environmental review record, and provided technical assistance to the Parish.

Senior Grant Manager (06/2016 – 06/2020)

Gustav/Ike Projects, CDBG-DR Funds, City of Gretna, Louisiana

Developed policies and procedures for all aspects of the CDBG program. Assisted in contractor procurement process. Ensured cost reasonableness of change orders and contract amendments. Prepared final project completion and monitoring reports.

Senior Grant Manager (11/2015 – 04/2020)

Gustav/Ike Projects, CDBG-DR Funds, Jefferson Parish

Coordinated project schedules from environmental clearance through engineering and construction administration to ensure that critical path milestones were met on time, including labor compliance. Prepared monthly status reports and guided development and review of plans and specifications. Ensured cost reasonableness of change orders and contract amendments. Processed requests for payment and prepared final project completion and monitoring reports.

Senior Grant Manager (06/2009 – 12/2014)

CDBG, St. Tammany Parish Government

Served as CDBG Entitlement Administrator and liaison to HUD. Lead all program management efforts, developed policies and procedures, oversaw NOFA process, prepared environmental reviews, managed project budgets. Ensured compliance for CDBG and CDBG-DR funding for both HUD and LA OCD-DRU funded projects.



Geoffrey Magon

Director | CohnReznick Advisory LLC

BIOGRAPHY

Geoffrey has over fourteen years of experience in the project management of Federal, State and local programs. He has held roles focused on program design and project management, grant and contract management, and business analytics. His specific experience includes CDBG, CDBG-DR, HOME, NSP, and LIHTC project development and subsidy layering.

- Grant administration for Environmental Protection Agency (EPA), Federal Emergency Management Agency (FEMA) and U.S. Department of Housing and Urban Development (HUD) funded projects
- Experienced in Program Design and Implementation (Housing and Economic Development programs)
- Stafford Act compliance for disaster recovery projects
- Data Architecture Development for Program Design, Development, and Reporting.

EXPERIENCE

Director (March 2025 – Present) Inclusive Prosperity Capital

Geoffrey led CohnReznick’s technical assistance to Inclusive Prosperity Capital (IPC) in launching its EPA-funded Solar for All program. He oversaw the development of IPC’s compliance infrastructure and provided strategic guidance on federal grant management.

- Developed IPC’s Compliance Framework Manual, including workflows, risk assessments, and oversight protocols.
- Created tools and templates for procurement, financial management, and subrecipient oversight.
- Provided day-to-day oversight on draw reviews, EPA/OIG reporting, and subrecipient payment processing.
- Delivered training and technical assistance on Davis-Bacon (DBRA), Uniform Relocation (URA), National Historic Preservation Act (NHPA), Build America Buy America (BABA), and Environmental Review.
- Reviewed and advised on IPC’s internal policies, procurement practices, and conflict of interest protocols.

Proposed Labor Category

Senior Grant Manager – Task Area 17

Proposed Task Areas

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

Education

- B.A., Sociology with an Economics emphasis, University of Illinois



Director (January 2025 – Present)

HUD Technical Assistance – City of Asheville and CDBG-DR Universal Notice

CohnReznick was engaged by HUD to provide direct technical assistance to the City of Asheville following Hurricane Helene and was also engaged to support HUD's national rollout of the CDBG-DR Universal Notice for financial management. Geoffrey played a dual role, supporting local implementation and contributing to national-level policy and tool development.

- For the City of Asheville, Geoffrey provided TA regarding the launch of the city's Business Restabilization Grant Program using CDBG funds, providing training, compliance oversight, and capacity-building support to city staff and subrecipients.
- He reviewed program materials, assessed subrecipient readiness, and facilitated coordination with HUD to ensure alignment with federal requirements.
- At the national level, Geoffrey led the development of financial management tools for HUD to distribute to CDBG-DR grantees, including a Financial Certification Package and guidance on proficient financial controls, procurement procedures, and fraud prevention.
- He co-authored policies and procedures templates for disaster recovery websites, duplication of benefits (DOB) prevention, timely expenditure of funds, and conducted staffing and capacity assessments to support grantee readiness.

Senior Manager (May 1, 2023 – May 30, 2024)

Community Preservation Corporation

CohnReznick worked with the Community Preservation Corporation (CPC) to assist them in assessing the feasibility of their program design, review of their existing policies and procedures, highlight potential gaps in their policies and procedures, assessed their Implementation and Administration Plan, and provided an analysis of the GGRF National Clean Investment Fund (NCIF) Notice of Funding Opportunity (NOFO).

- Geoffrey served as CPC's on-call advisor during the application development and award negotiation process. He advised executive and program level staff regarding EPA specific compliance requirements, 2CFR 200 requirements, federal cross cutting requirements (Davis Bacon, URA, Historic Preservation, Build America Buy America, etc.)
- Additionally, he provided advisory services regarding their program design framework, funds flow across entities, and overall budgeting and allowable cost categories.

Senior Manager (January 2023 - Present)

ROC USA

ROC USA is a leader within the manufactured housing and resident owned community industry. Due in large part to their effort in championing the PRICE fund, Congress appropriated funding through HUD under the Housing and Community Development Act of 1974 for manufactured housing and resident owned communities. CohnReznick was contracted by ROC USA based on our experience with new and innovative grant programs - most recently CARES Act and ARPA funding - to assist with preparation, planning, and program design.

- Program Design Support; and
- Program Administration Plan Development.



Senior Manager (September 2022 - Present) **Delaware State Housing Authority (DSHA)**

CohnReznick is engaged to provide Project Management, Accounting & Compliance Reporting for DSHA's State and Local Fiscal Recovery Funds (SLFRF) Program, funded under the American Rescue Plan Act (ARPA). This \$60 million program incorporates several sub-programs to address the critical affordable housing needs throughout the State of Delaware. The Catalyst Fund is designed to redevelop blighted areas unable to be redeveloped by traditional market forces. The Accelerator and Preservation Fund are separate approaches to stabilize and increase the number of affordable housing units throughout the state. Finally, the Market Pressure Relief program seeks to address the rapidly evolving market and economic conditions to ensure that ongoing affordable housing LIHTC developments continue their sustainability.

- Program Design Support;
- Program Administration Plan Development;
- Program Policy, Procedure, and Application Development;
- System of Record and Data Architecture Development;
- Project Application Eligibility Review; and
- Program Compliance and Reporting.

Lead Senior Manager (January 2021- December 2021) **Connecticut DOH – UniteCT Emergency Rental Assistance Program**

CohnReznick contracted with CTDOH to provide support for its Emergency Rental Assistance Program, UniteCT. Our duties included analysis of statutory language from the Consolidation Appropriations Act 2021. We worked with the CTDOH and the Governor's Office of Policy Management (OPM) to develop the State's policies and program eligibility requirements. This \$235 million program was designed to provide rental and utility payment assistance to qualified CT households financially impacted by the COVID-19 pandemic. The intention of UniteCT to help stabilize CT's rental housing market while serving households at or below 80% of HUD's Area Median Income required both effective policies and procedures and quick action to make eligibility determinations. Our firm managed over 250 staff simultaneously and 15 separate non-profit Housing Counseling Agencies throughout Connecticut to perform in-depth reviews of applicant residency and income information and eligibility, as well as landlord ownership information and payment amounts. CohnReznick had the opportunity to assist the State of Connecticut in the disbursement of over \$195 million to more than 27.5k households in a period of less than 8 months.

- Reviewed Treasury guidelines and regulations to develop program policies for UniteCT;
- Collaborated with Yardi Systems on the Rent Relief portal development and customization for UniteCT;
- Developed program procedures, processes, tools, and resources for the application review team;
- Developed outward-facing correspondence templates for application review team;
- Trained and onboarded over 250 internal and external staff on performing application reviews;
- Supported the State's staff in implementing various new guidance, functions, processes, and initiatives; and
- Supported the State and the application review team by addressing complex or problematic applications or program participants and performing conflict resolution.

Senior Manager (April 2019 – November 2022) **Texas General Land Office (GLO)**

CohnReznick as a teaming partner carries out financial monitoring and oversight, grant administration, and project



Management duties in the recovery efforts from Hurricane Harvey. This \$5 billion program is one of the largest awards in CDBG-DR history.

- Relationship management with CohnReznick’s teaming partner;
- Provision of management plans for Organizational Conflicts of Interest;
- Program oversight for the City of Houston’s Homeowner projects;
- Technical Assistance to the GLO and the City of Houston for their respective Economic Development programs;
- System of Record development and process improvement;
- Program data reporting;
- QA/QC planning, identification, and testing; and
- Guidance on Compliant Policy, Appeals Policy, and Anti-Fraud Waste and Abuse (AFWA) Policy.

Senior Manager (November 2018 - Present)

Texas General Land Office (GLO)

CohnReznick is currently engaged under a contract with the GLO to provide application and underwriting services to facilitate CDBG-DR housing and infrastructure activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside \$250 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

- Assess applicant’s ability to construct and operate multi-family housing utilizing CDBG-DR funds;
- Analyzes the financial feasibility of proposed developments;
- Underwrites the allowability and cost reasonableness of all hard construction costs, associated soft costs, and development fees;
- Analyze gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment;
- Develops underwriting tools, reporting templates, and workflow processes; and
- Provides guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.

Analyst (October 2010 – October 2012)

Illinois Department of Commerce and Economic Opportunity

CohnReznick was engaged as a subcontractor in the Illinois “Ike” Disaster Recovery Program, (IDRP) which is a key component of the state’s long-term recovery efforts pursuant to the record flooding experienced in 2008. The mission of this program was to disburse approximately \$211 million in HUD’s CDBG-DR funds for expenses related to disaster relief, long-term disaster recovery and restoration of infrastructure, housing, and economic revitalization in areas affected by the flooding.

- Geoffrey assisted in the development of policies and procedures for economic development programs which included the state’s Community Stabilization Program and Business Assistance program;
- Evaluated the ability of contracted subrecipients and CDFI’s to manage revolving loan funds;
- Analyzed the financial feasibility of requested loans;
- Underwrote the allowability and cost reasonableness of all economic development projects submitted to the State of Illinois;
- Analyzed gap funding, identify potential duplication of benefits issues, ensured projects were meeting the economic development public benefit standards for job creation;
- Developed underwriting tools, reporting templates, and workflow processes.



Carson Phillips

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Carson Phillips has 10+ years of experience in federal grants management and has served in roles directly interfacing with the federal agency making grant awards as the prime recipient and acting as a passthrough to subrecipients. She has Carson Phillips has 10+ years of experience in federal grants management and has served in roles directly interfacing with the federal agency making grant awards as the prime recipient and acting as a passthrough to subrecipients. She has also served in roles where she was a subrecipient of federal awards passed through state agencies and has advised on strategy. She is a credentialed Certified Grants Management Specialist and a sought-after speaker who regularly leads workshops and presentations on federal grant compliance.

Carson has a variety of experience supporting client's grant management portfolios including federal funds from Housing and Urban Development (HUD), Environmental Protection Agency (EPA), Administration for Children and Families (ACF), and other state, local, and private funding sources. Her experience spans across 42 states and includes the full grant lifecycle from application to closeout. She has worked with a variety of grant management platforms and has an eye for supporting development of a strong system that has robust capabilities for prime grantee oversight, is practical for program officer use, and is user-friendly for subrecipient reporting and reimbursement requests.

She specializes in launching large, new programs with strong infrastructure to avoid compliance pitfalls. In the aftermath of the COVID-19 Pandemic, Carson supported a large childcare company to set up a new grants management department which processed over 4,500 grants. She was instrumental in developing the compliance infrastructure for a Greenhouse Gas Reduction Fund Solar for All project. Similarly, she supported a national nonprofit apply for, receive funding, and launch a new infrastructure program to preserve affordable housing.

Prior to joining CohnReznick, as Executive Director of the South Carolina Service Commission, Carson successfully applied for public and private funding, managed statewide competitive grant opportunities, awarded grants, completed risk assessments, designed, and implemented

Proposed Labor Category

Senior Grant Manager – Task Area 17

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
4. Procurement Compliance and Monitoring
6. Action Plan Development and Amendments
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- B.A. Psychology, Focus on Social Psychology, Clemson University
- B.A. Sociology, Focus on Industrial Sociology, Clemson University

Certifications

- Certified Grants Management Specialist (CGMS)



monitoring schedule, and closed out awards. She led a team of seven to completely update all written policies and procedures for the Commission and trained new staff on operations. She was responsible for oversight of monthly expenditure reviews, drawing funds, and issuing payment to subgrantees for reimbursement on federal grants totaling ~\$4M annually, and was also responsible for the development, creation and implementation of Salesforce as the Commission's system of record. Carson created reports and other collateral material for the federal agency, UWASC Board of Directors, SC Service Commission Board of Commissioners, elected officials and general audiences. She led a communications campaign including TV ads, billboards, and social media outreach that yielded over \$600,000 in in-kind donations and exponentially increased web traffic and social media impressions.

During her time at the United Way Association of South Carolina, Carson responded to 6 federally declared natural disasters. During the floods of 2015, she served on the Executive Committee of the state VOAD who worked closely with the state Emergency Management Division and the Federal Emergency Management Agency to determine strategy for response and recovery.

EXPERIENCE

Project Manager (January 2023 – Present)

Louisiana Office of Community Development – Disaster Recovery Unit (LA OCD DRU)

CohnReznick provides Software Evaluation and Support Services for the Economic Development and Infrastructure (ED&I) Program team for the Office of Community Development, Disaster Recovery Unit. The ED&I programs are funded by allocations from the Department of Housing and Urban Development's (HUD) Community Development Block Grant Disaster Recovery Program (CDBG-DR) with the objective of assisting the state in long-term recovery efforts

- **Process & Program Workflow Optimization:** Recommend and implement improvements to processes, structure, and resource use in coordination with OCD. Implementation of monthly subrecipient report to include milestone tracking activities.
- **System Support:** Collaborate with developers and OCD to manage system updates, testing, and requirements.
- **Data & Reporting:** Align and standardize data from multiple sources, define reporting needs, and deliver scheduled reports. Reports integrate data from state fiscal system of record, DRGR, and Grant Management Solution.

Training: Update and tailor technical specification training materials for revised processes and user-specific needs.

Project Manager (March 2025 – Present)

Clean Energy Fund of Texas

CohnReznick provided advisory services related to the Clean Energy Fund of Texas related to their Solar for All Program, the CHARGE Initiative. Working primarily with CEFTX, and in collaboration with their Program Partners, CohnReznick was a thought partner for all elements of a launching a new program; from developing an application, review and selection process, drafting program guidelines, written policies and procedures, to conducting financial reconciliations, and developing subrecipient trainings.

- **Program Implementation and Federal Compliance Infrastructure:** We developed and implemented program policies, procedures, and systems to ensure full adherence to 2 CFR 200, EPA Terms and Conditions, and Solar for All Terms and Conditions.
- **Technology and Reporting Systems:** We advised CEFTX on configuring systems for tracking budgets, milestones, and deliverables, including contingency planning for funding disruptions. In instances where the selected technology



could not meet all of the needs of the program, CohnReznick advised on wraparound products that could accomplish the program goals.

- Subrecipient Support and Oversight: Our team structured the subrecipient application and review process to ensure proper governance. Further, we established and enhanced systems necessary for effective grant management, including financial tracking, reporting, and compliance monitoring.
- Stakeholder Coordination: CohnReznick worked in collaboration with CEFTX and its program partners to identify stakeholders, define disparate and coordinated scopes of work, and establish a unified framework for engagement, implementation, and accountability across all program activities.

Project Manager (January 2023 – Present)

ROC USA

CohnReznick worked with ROC USA to write and submit their application through Grants.gov to HUD to apply for \$75MM in funding to be distributed across 29 ROCs identified in the application through PRICE funding. Projects were sourced from throughout their national footprint and included acquisition, infrastructure, infill, and resilience activities. The grant was funded and CohnReznick is now supporting the implementation of the project.

- Provide grant writing and application management, including proposed budget;
- Attend client management meetings to provide updates on progress;
- Provide technical assistance on 2 CFR 200 requirements.

Project Manager (December 2021 – April 2025)

Bright Horizons – Centralized Funding Administration Process

CohnReznick provides consulting services to Bright Horizons, one of the largest for-profit childcare providers in the world, to seek federal funding for various costs, such as loss of revenue, incurred as a direct result of the COVID-19 pandemic. The team assists Bright Horizons in identifying, applying for, reporting on, and reconciling federal and state funding received across over 500 childcare centers in over 30 states. Our professionals are also responsible for creating and maintaining standard operating procedures that document internal controls against fraud, waste, and abuse. Estimated funds pursued are \$400 million. In conjunction with Bright Horizon's staff, our team secured over \$225M in grant funding to support the preservation of childcare across the country.

- Identify eligible grant opportunities across all states of operation;
- Prepare and submit over 4,500 grant applications;
- Ensure compliance to specific grant requirements of over 260 unique grant programs
- Provide technical assistance on 2 CFR 200 requirements;

Create robust standard operating policies and procedures to ensure proper control environment;

- Generate weekly reports on progress;
- Perform reviews of all project workflows;
- Identify & correct discrepancies the system of record.
- Provide overall management and oversight over staff;
- Prepare reports to executive team, local operations, and other unique audiences to communicate progress.

**Project Manager, Research Lead (January 2023 – May 2025)****City of Atlanta Department of Grants and Community Development**

CohnReznick has been asked to provide project and grant management support for the City's Department of Grants and Community Development (DGCD) federal grant programs including CDBG, HOME, and HOPWA. Specifically we have been tasked to serve as expert advisors performing fund reconciliations, environmental reviews, application reviews, underwriting, and revising policies/procedures and SOPs for DGCD.

- Provide overall management and oversight over staff and subcontractors;
- Attend client management meetings to provide updates on progress;
- Provide technical assistance on 2 CFR 200 requirements.
- Oversee execution of NEPA compliant HUD Environmental Reviews for each of the categories
- Oversaw review of HOME applications, development of review tool

Project Manager (January 2024 - May 2024)**Coalition for Green Capital – Legal Services Procurement**

CohnReznick supported CGC's efforts to solicit legal services via a full and open competition, in compliance with procurement policies set forth in 2 CFR Part 200. CohnReznick supported each stage of the solicitation process from drafting, publishing and distributing, and developing selection criteria for bids related to three solicitations for legal services. Services were provided in a sprint pace to meet the client's need to release an RFP and host competition ahead of internal deadlines.

- Perform GAP analysis on current policies and procedures for 2 CFR 200 Compliance
- Propose updates and draft sample language to update policies and procedures
- Create drafts for RFPs for three distinct solicitations for legal services
- Provide guidance on how to maximize responses via advertising and RFP distribution
- Create a schedule and procedure for receipt of responses
- Create a scoring template for reviewers use
- Create an overall scoring template for overall review
- Provide guidance on maintaining a complete folder of documentation for purposes of demonstrating compliance.

Compliance Manager (February 2023 – August 2023)**City of Columbia**

CohnReznick is responsible for developing grant proposals on behalf of the City of Columbia. The South Carolina Opioid Relief Fund has been the primary source of funding, however the scope of services is expansive to other funding opportunities.

- Provide grant writing and application management, including proposed budget;
- Guide client on deliverables promised in application;
- Share best-practices for grant management;
- Develop stakeholders.



OTHER WORK EXPERIENCE

Executive Director (April 2013 – December 2021)

United Way Association of South Carolina

Carson served as the Executive Director of the South Carolina Service Commission, where she provided leadership to a state-wide portfolio of AmeriCorps programs, representing over \$4M of Federal Funds, matched with local support. The United Way Association of South Carolina serves as the alternative administrative agency for State Commission. This strategic position has given Carson the unique opportunity to serve as part of the both the United Way and State Service Commission networks, aligning on the common goal of volunteerism.

- Skilled leader in change management and implementing strategic planning, leading a team with a \$1.5M Internal Operating Budget.
- Strong ability to identify and interpret federal and state policies governing effective program management.
- Responsible for a portfolio of 20+ AmeriCorps Programs and Volunteer Generation Funds Programs, representing over \$ 4.5M investment of federal and private funds into direct-service programming throughout SC as Prime Grantee
- Responsible for training, monitoring, and enforcing programmatic and fiscal requirements to ensure compliance and mitigate risk while maximizing impact to local communities
- Created communications to regularly engage with constituents and build relational trust, tailored to each audience.



Sarona Saadeh

Senior Manager | CohnReznick Advisory LLC

BIOGRAPHY

Sarona Saadeh is a Senior Manager with CohnReznick's Government Advisory Practice with over 12 years of experience providing financial analysis and disaster recovery consulting services to housing developers and government entity clients. Ms. Saadeh has experience providing financial advisory and underwriting services for housing projects funded with the Low-Income Housing Tax Credit, Tax Exempt Bonds, CDBG-DR, and other Federal programs. Ms. Saadeh also provides grant management and disaster recovery consulting to State entities utilizing CDBG-DR and FEMA Public Assistance Grant funds and has been involved in assisting State entities run large-scale housing programs.

EXPERIENCE

Subject Matter Expert; Program Manager (September 2022 - present) **Delaware State Housing Agency (DSHA)**

CohnReznick is engaged to provide Project Management, Accounting & Compliance Reporting for DSHA's State and Local Fiscal Recovery Funds (SLFRF) Program, funded under the American Rescue Plan Act (ARPA). This \$60 million program incorporates several sub-programs to address the critical affordable housing needs throughout the State of Delaware. The Catalyst Fund is designed to redevelop blighted areas unable to be redeveloped by traditional market forces. The Accelerator and Preservation Fund are separate approaches to stabilize and increase the number of affordable housing units throughout the state. Finally, the Market Pressure Relief program seeks to address the rapidly evolving market and economic conditions to ensure that ongoing affordable housing LIHTC developments continue their sustainability.

- Program Design Support;
- Program Administration Plan Development;
- Program Policy, Procedure, and Application Development;
- System of Record and Data Architecture Development;
- Project Application Eligibility Review; and
- Program Compliance and Reporting.

Proposed Labor Category

Senior Grant Manager – Task Area 17

Proposed Task Areas

1. Development of Policies, Procedures, and Standard Operating Procedures (SOPs)
2. Financial Compliance, Oversight, and Fraud Prevention
3. Duplication of Benefits (DOB) Compliance
4. Procurement Compliance and Monitoring
5. Claims, Appeals, and Case Reviews
6. Action Plan Development and Amendments
8. Program Performance Monitoring and Evaluation
10. Audit Readiness and Monitoring Support
12. Training, Technical Assistance, and Capacity Building
15. Grant Management
16. Technical Systems Specification & Project Management
17. Environmental Review

Education

- M.B.A., Texas State University
- B.B.A., Accounting, Texas State University



Subject Matter Expert; Program Manager (January 2021- December 2021) **Connecticut Department of Housing (CTDOH)**

CohnReznick contracted with CTDOH to provide support for its Emergency Rental Assistance Program, UniteCT. Our duties included analysis of statutory language from the Consolidation Appropriations Act 2021. We worked with the CTDOH and the Governor's Office of Policy Management (OPM) to develop the State's policies and program eligibility requirements. This \$235 million program was designed to provide rental and utility payment assistance to qualified CT households financially impacted by the COVID-19 pandemic. The intention of UniteCT to help stabilize CT's rental housing market while serving households at or below 80% of HUD's Area Median Income required both effective policies and procedures and quick action to make eligibility determinations. Our firm managed over 200 staff simultaneously to perform in-depth reviews of applicant residency and income information and eligibility, as well as landlord ownership information and payment amounts. CohnReznick had the opportunity to assist the State of Connecticut in the disbursement of over \$195 million to more than 27.5k households in a period of less than 8 months.

- Reviewed Treasury guidelines and regulations to develop program policies for UniteCT
- Collaborated with Yardi Systems on the RentRelief portal development and customization for UniteCT;
- Developed program procedures, processes, tools, and resources for the application review team;
- Developed outward-facing correspondence templates for application review team;

Trained and onboarded over 250 internal and external staff on performing application reviews;

Developed processes and trained case management professionals for high volume application intake;

- Supported the State's staff in implementing various new guidance, functions, processes, and initiatives;
- Supported the State and the application review team by addressing complex or problematic applications or program participants and performing conflict resolution.

Subject Matter Expert; Grant Manager (July 2019 – July 2020) **Texas General Land Office (GLO)**

CohnReznick is currently engaged with the GLO to provide grant management services to facilitate CDBG-DR administered by the GLO and their Subrecipients under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$5 billion for the Hurricane Harvey CDBG-DR recovery activities. Ms. Saadeh is specifically responsible for the oversight of four community development programs totaling nearly \$700 million in CDBG-DR funding and provides technical assistance on cross-cutting federal regulation, CDBG-DR policy, industry best practice, and program specific evaluation to develop solutions to meet federal and state requirements.

- Review Action Plan amendments to ensure consistency and accuracy with desired outcome;
- Review subrecipient program guidelines to provide feedback and revisions that align with federal/state policy;
- Develop program criteria including application and payment request requirements;
- Develop application/payment review processes: SOPs, checklists, organizational structures;
- Develop project trackers, determination letter templates, progress & status reports;
- Perform reviews of documentation to determine eligibility for participation and for reimbursement;
- Act as a liaison between the subrecipient and the State to ensure clear and up-to-date flow of information;
- Collaboration with State grant management system designers to update and improve functionality for optimal project record retention and reporting.

**Manager (October 2018 - Present)**
Texas General Land Office (GLO)

CohnReznick is currently engaged with the GLO to provide application underwriting services to facilitate CDBG-DR housing activities administered by the GLO under the State of Texas Plan for Disaster Recovery. The State of Texas has set aside over \$450 million for the Hurricane Harvey Affordable Rental Housing Program to rehabilitate, reconstruct, and newly construct multi-family housing.

- Develop underwriting tools, reporting templates, and workflow processes;
- Assess applicant's ability to construct and operate multi-family housing utilizing CDBG-DR funds;
- Analyze the financial feasibility of proposed developments;
- Underwrite the allowability and cost reasonableness of all hard construction costs, associated soft costs, and development fees;
- Analyze gap funding, identify potential duplication of benefits issues, and review projects for undue enrichment; and
- Provide guidance to the State of Texas regarding CDBG program and other federally required regulatory compliance.

Grant Coordinator (October 2017 – December 2019)
Texas Division of Emergency Management (TDEM)

Led by CohnReznick professionals with expertise in disaster recovery grant management, CohnReznick serves as the prime contractor to the Texas Division of Emergency Management for Federal Grant Administration. CohnReznick is responsible for establishing consistent oversight standards, providing proactive technical assistance and communication, project and disaster closeouts, centralized data and reporting, quality management protocols, reviewing and improving procedures, and addressing reimbursements and financial management.

- Establish and maintain relationships with subrecipients around the State;
- Provide technical and programmatic assistance regarding the Stafford Act, FEMA Public Assistance Program, and relevant updates in policies and procedures;
- Ensure deadlines are met, applications and documentation is complete and accurate before submission to federal authorities;
- Review project worksheets scope of work to ensure completeness and accuracy;
- Provide assistance on project reimbursement documentation to ensure compliance with applicable regulations;
- Perform site inspections and document progress and/or completion of projects, causes for delay, and deviations from scope of work;
- Process subrecipient requests regarding scope changes, time extensions, and special circumstances; and
- Monitor compliance through regular technical assistance, quarterly status reviews, and ongoing monitoring of reimbursement requests.
- Closely involved with the Texas General Land Office PREPS Program, serving as a liaison between the State, FEMA, and the GLO by assisting with program compliance, grant management and tracking, and assisting with special issues outside the traditional realm of FEMA Public Assistance.



Development Finance Consultant (2014 - 2018)
Houston Housing Authority (HHA)

CohnReznick was engaged with HHA in the areas of taxation, audit, and real estate consulting relating to the HHA's tax credit and public housing affordable properties.

- Review tax returns and audited financial statements of affordable rental properties;
- Provide financial projections and cash exposure analysis on existing projects;
- Review pre-development financial budgets for new project proposals and provide technical assistance in project financial structuring and forecasting;
- Perform various agreed-upon procedures related to tax and programmatic compliance requirements such as tax-exempt bond arbitrage analysis, and 95-5, 50%, and 10% cost tests;
- Review and assist in the preparation of 8609 applications; and
- Provide portfolio valuation, capital account analyses, and debt analysis on new and existing projects.



Robert Myers III

Environmental Scientist | Metric Consulting

BIOGRAPHY

Mr. Myers is experienced providing a wide array of environmental assessments and technical reports, with an emphasis on PD&E, wildlife surveys, and environmental permitting. Mr. Myers has held USFWS 10(a)(1)(A) endangered species permits for 20 federally listed species and is a proven PD&E scientist who has managed PD&E projects in five FDOT districts.

EXPERIENCE

Project Manager/Senior Environmental Scientist

CDBG, HOME, ESG, CDBG-CV, and EGS-CV HUD Grant Environmental Documentation, Collier County, Florida

Metric holds an ongoing contract with Collier County Government to conduct Site Specific Environmental Reviews and prepare appropriate NEPA documentation. Metric begins by screening projects and determining the appropriate Classes of Action and level of required documentation. Metric 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. We have also found that following and attaching the HUD Partner Worksheets for each particular category is key to understanding how HUD interprets environmental regulations and what supporting information will be required to demonstrate compliance and secure project approval. As public involvement and notification are often required, Metric identifies if the 8-step or 5-step processes are required and then prepares necessary documentation for public notice. As needed, Metric also develops correspondence and documentation for regulatory agencies. Ultimately, Mr. Myers (Project Manager) certifies the environmental documentation and presents it to the County for approval and signature by the County Manager as the Responsible Entity.

Community Development Block Grant-Disaster Recovery Expert Administrative Support Proposed Labor Category

Senior Grant Manager – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- B.S., Biology, University of Texas at Austin (2004)



Senior Environmental Scientist

HUD Voluntary Home Buyout, City of Panama City, Panama City, Florida

Metric 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, Metric 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.

Environmental Specialist

Hurricane Harvey Disaster Recovery Program, Texas General Land Office, Various Sites, Texas

Mr. Myers 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 US Housing and Urban Development Block Grants related to Hurricane Harvey. Metric created a custom GIS tool and has produced the required GIS maps, data, and NEPA documentation for well over 100 applicant properties.

Senior Environmental Scientist

Tradeport Boulevard ACE Study, Florida Department of Transportation, District 1

This project 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.

Senior Environmental Scientist

SR 29 from I-75 to Oil Well Road PD&E Study, Florida Department of Transportation, District 1

Mr. Myers manages all environmental aspects of the PD&E to widen SR 29 between I-75 and Oil Well Rd. This project corridor runs between Florida Panther National Wildlife Refuge and Big Cypress National Preserve. Because of the high-profile conservation land and potential impacts to listed species, this project requires extensive coordination between FDOT, USFWS, NPS, and private landowners. Major issues involve environmental impacts to wetlands, public land, Florida panthers and other listed species.

Senior Environmental Scientist

I-75 ITS Installation Wetland Delineation, Listed Species Survey, and Environmental Permitting, Florida Department of Transportation, District 2

Conducted a wetland delineation and gopher tortoise burrow survey for 87 miles of ITS installation. Tasks also included coordination of avoidance and minimization measures with design engineers, agency coordination, and obtaining permits from USACE and SJRWMD through FDEP.

Senior Environmental Scientist

US 90 PD&E Study, Florida Department of Transportation, District 3

Providing environmental management and QA/QC for this PD&E Study of a new roadway alignment within Milton, FL. The study covers approximately five miles and faces unique challenges from Section 4(f) impacts, relocations, contamination, and a river crossing. Mr. Myers' principal duties include serving as the lead author for the Conceptual Stage Relocation Plan, the Section 4(f) DOA and DOE, the Contamination Screening Evaluation Report, as well as providing support for the Noise Study Report.



Matthew Paek

Environmental Scientist | Metric Consulting

BIOGRAPHY

Matthew Paek 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, Mr. Paek 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.

EXPERIENCE

Environmental Scientist

HUD Voluntary Home Buyout, City of Panama City, Florida

Metric holds an ongoing contract to conduct 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 its first Task Work Order, Metric 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.

Environmental Scientist

General Program Services (Homeowner Assistance Program), Texas General Land Office

Metric 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

Proposed Labor Category

Junior Grant Manager – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- M.S., Natural Resources, Auburn University (2021)
- B.S., Natural Resource Management, Auburn University (2019)

Certifications

- FDEP Qualified Stormwater Management Inspector



broad reviews and qualify for the program under one of several proposed actions. The Metric 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 Metric 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.

Environmental Scientist

22-03-00 Professional Services - Environmental Review of DeSoto County CDBG-MIT & CV Funded Projects, DeSoto County, Florida

Metric held an ongoing contract with DeSoto county providing Professional Services for the Environmental Review of current, anticipated, and upon request, future Housing and Urban Development (HUD) Community Development Block Grant Mitigation (CDBG-MIT) and Community Development Block Grant Corona Virus (CDBG-CV) funded projects. Throughout this contract Metric will conduct Environmental Assessments and Tiered Environmental Reviews that satisfy all HUD requirements as defined in 24 CFR 58, in accordance with all applicable laws, environmental regulations, applicable Federal, State, and Local regulations established by the National Environmental Policy Act (NEPA), and development of the corresponding Environmental Review Records (ERR). Metric will oversee the Environmental Assessments of an array of potential impacts, including but not limiting to: Land Development, Socioeconomic, Community Facilities and Services, Health Care, Social Services, Solid Waste Disposal/Recycling, Wastewater/Sanitary Sewers, Water Supply, Public Safety – Police Fire, and Emergency Medical, Parks, Open Space and Recreation, Unique Natural Features, Water Resources, and Vegetation and Wildlife. During the entire environmental review process Metric provided a comprehensive Environmental Review Record for the pre-project environmental conditions, the anticipated environmental impact of the proposed activities and any potential mitigation measures that may be appropriate to bring the project into environmental compliance. Task Work Orders include:

- **TWO 1 Middle School Hardening:** This TWO involved the “hardening” of an emergency shelter which was also a public middle School (DeSoto Middle School), including installing a backup generator. This location was also a public school and the NEPA review required extensive coordination and modeling to demonstrate the project did not represent an unacceptable explosive risk.
- **TWO 2 Bridge Repair:** This TWO involved replacing a bridge over Horse Creek on County Road 769, DeSoto County’s only county-maintained bridge recognized by the Florida Division of Emergency Management as an Evacuation Route. The rural location provided potential habitat for the Federally listed Audubon’s crested caracara, and Horse Creek is designated Critical Habitat for manatees with associated wetlands. Metric led coordination with USFWS and regulatory agencies, securing a letter confirming no anticipated adverse impacts on listed species.
- **TWO 3 King & Baker Drainage:** This project was to replace and upgrade the water lines and the stormwater system in a residential neighborhood in Arcadia.

**Environmental Scientist****Professional Consulting Services to Permit FEC Section II, Cemex Construction Materials of Florida**

Metric provides environmental services for USACE Dredge and Fill Permit applications and FDEP Environmental Resource Permit applications for Phase II's that are currently under review. Metric secures permits from the Miami-Dade County Department of Regulatory and Economic Resources (DRER). This Metric Team provides full support in the award of a Miami-Dade Class IV Wetland Permit, Rockmining Certificate and Lake Excavation Permit, and will also coordinate with MacVicar Consulting as needed.

Environmental Scientist**Tradeport Boulevard ACE Study, FDOT District 1**

This project 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. Mr. Paek assisted with GIS analysis and mapping as well as research and documentation of existing conditions.

Environmental Scientist (2022-2025)**PD&E Study Race Track Road at SR 5 (US 1), FDOT District 2**

Race Track Road at US 1 is a vital intersection located on the Duval and St. Johns County line. This intersection ties into the fast-growing Nocatee community and is adjacent to a rail line owned by Florida East Coast Railway. This PD&E study will look at alternatives to improve the currently strained intersection while minimizing impacts to the natural, social, and physical environment. Our PD&E staff will work alongside the Department to help repurpose old racetrack land into the Grand Cypress which will support mixed-use development for the community. Additionally, this project will work to reduce current intersection congestion. Overall, this project will be completed through Phase I which includes the execution of various studies and then through Phase II which supports the development of design work. This project is anticipated to roll into final design with an anticipated construction date of 2027.

Environmental Scientist (2022 – 2027)**Continuing Services Design Consultant, FDOT District 3**

This task work order based contract includes design work for milling and resurfacing, intersection improvements, structures, signalization, lighting, drainage, signing and pavement markings (S&PM), maintenance of traffic, right-of-way maps, environmental permits, utility coordination and relocations, geotechnical investigations and testing, design surveys, and post-design services, as well as minor services such as plans updates, cost estimates and scheduling support, fiber upgrades, and public involvement (PI) services.

Environmental Scientist**Tri-Rail Coastal Link Service PD&E Study in Palm Beach, Broward and Miami-Dade Counties, FDOT District 4**

This effort included preparation of the environmental studies necessary to comply with FTA requirements and led to the preparation of an Environmental Assessment for a proposed integrated regional rail transit system on the Florida East Coast Railway Corridor. The transit corridor being evaluated is along the existing FEC Railway that generally parallels Dixie Highway and U.S. 1. The 85-mile study area extends from Jupiter through Pompano Beach to downtown Miami. Tasks also included the existing and future operational analysis for the rail-highway grade crossings and adjacent signalized intersections, in addition to the 25 station area locations along the alignment (65 additional intersections).



Environmental Scientist

I-75 at NW 49th PD&E Study from NW 49th St. to NE 35th St. in Marion County, FDOT District 5

Type 2 CE PD&E Study for a new I-75 interchange at NW 49th Street in Ocala, FL. The proposed interchange is needed to support the economic viability of the Ocala 489 Commerce Park, a Class A industrial distribution center, and contiguous Enterprise Zone, as well as the County's vision for a future east-west corridor parallel to US 27. Several interchange concepts were evaluated including a diamond, single point urban, and partial cloverleaf. The preferred alternative involves a diverging diamond and extension of NW 49th Street to the future NW 35th Street extension County project. The Study involved preparation of an Interchange Justification Report (IJR) an extensive stakeholder coordination.

Environmental Scientist

SR 535/Vineland Road PD&E Study from US 192 to North of World Center Drive, FDOT District 5

This purpose of this PD&E Study is to accommodate future projected traffic demand and improve safety involved with widening of SR 535 from US 192 to World Center Drive, a project length of approximately 2.2 miles. In the existing condition, SR 535 is an urban minor arterial, access class 3 facility with posted speeds ranging from 45 miles per hour (MPH) to 50 MPH. The roadway has four travel lanes (two in each direction) from US 192 to SR 536/World Center Drive.

Environmental Scientist

PD&E Public Involvement, FDOT District 7

This contract is intended to provide staff extension to the District 7 Planning and Environmental Office. At its base, the contract will provide public engagement support for a variety of projects from planning, and design, through to construction, or maintenance. It will also provide support for high profile projects such as the Tampa Bay Next. This contract will also be utilized to initiate a novel approach to transportation, taking on a proactive stance rather than reactive. Community conversations will be held to support meaningful engagement with stakeholders along corridors to determine the needs of the area. The identified improvements will undergo analysis to determine potential effects, as well as conceptual plan development. TWOs include

- **Route Feasibility Study – Ayers Road Extension:** Providing a route feasibility study to continue the eastward extension of Ayers Road from US 41 to I-75. The study will include, but is not limited to, alignment feasibility, planning concept analysis, documentation of existing conditions, planning level traffic analysis, and community engagement.

Environmental Scientist

PD&E Widen TPK from N. of SR 70 to N. of SR 60 (MP 152-193), Florida's Turnpike Enterprise

This is a PD&E study to evaluate the widening of the Florida's Turnpike (SR 91) from north of SR 70 (Fort Pierce – MP 152) to SR 60 (Yeehaw Junction – MP 193) in St Lucie, Okeechobee, Indian River and Osceola Counties. Improvements and modifications to the existing SR 60 interchange, as well as possible future access locations will be studied. Florida's Turnpike (SR 91) is currently a four lane (two lanes in each direction). The following alternatives are three general toll lanes (in each direction) or recommendations for potentially phased implementation.

PRIOR WORK EXPERIENCE

Graduate Research Assistant (08/2019 – 12/2020)

School of Forestry and Wildlife Sciences, Auburn University

Mr. Paek conducted field surveys, collected and analyzed data, assisted with literature reviews and authored technical reports for various projects on Southeastern flora. During habitat assessments he used GIS programs to aid conservation



efforts for Southeastern flora.

Undergraduate Research Assistant (04/2018 – 05/2019)

Department of Biological Sciences, Auburn University

Mr. Paek assisted students in data collection on rare plant species. He also prepared permits for research on Southeastern flora and established pollinator plots and studied floral visitation.

Insulation Technician (05/2017 – 09/2017)

Ecological Insulation

Mr. Paek delivered insulation to project sites across Alabama and also assisted with installing the insulation in new apartment complexes in downtown Auburn. He used forklifts and box trucks to help complete his tasks.



William B. Kerr, Jr.

Senior Associate | Michael Baker International

BIOGRAPHY

Mr. Kerr is a Sr. Associate with experience in planning, environmental compliance, and impact analysis. His experience includes project planning, budgeting, scope preparation, negotiation, staff supervision, document preparation, and marketing. He has also coordinated public involvement for a variety of projects, presenting information to citizens and stakeholders, incorporating their feedback into the project development process.

EXPERIENCE

Senior Planner

Hampton Roads Transit East Side Draft Environmental Impact Statement, Hampton Roads, Virginia. Hampton Roads Transit

Responsible for the development of an Environmental Assessment for a transit line in downtown Norfolk. Michael Baker, through a joint venture, is leading a transit extension project to extend high capacity transit from HRT's existing light rail to Naval Station Norfolk along the east side of Norfolk. The project includes two tiers of alternatives analysis and completion of a draft and final environmental document for an initial recommended alternative. The project addresses extending light rail transit or bus rapid transit from the existing tide light rail to Naval Station Norfolk, the region's major employment center of more than 60,000 jobs. Michael Baker is responsible for project management, purpose and need, NEPA, traffic engineering, stakeholder and public engagement, and financial plan development.

Project Manager

HUD Environmental Analysis and Grant Application Reviews, Atlanta, Georgia. CohnReznick, LLP

Responsible for managing project, client coordination, QA/QC of project deliverables and environmental impact analysis. Michael Baker is providing environmental analysis and grant application reviews in support of the City of Atlanta Department of Grants and Community Development, as a sub-consultant to CohnReznick. The department serves as the lead agency for the Department of Housing and Urban Development (HUD) Environmental

Proposed Labor Category

NEPA Planner 3 – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- M.A., Urban and Regional Planning, San Jose State University, 1988
- B.A., Political Science, Howard University, 1984
- Graduate Studies, O, Journalism, University of Maryland

Professional Affiliations

- American Institute of Certified Planners (AICP)



Reviews. Michael Baker is also providing an analysis of HUD grant applications and grant underwriting to assess the feasibility of proposed projects.

Project Manager

Tier II Draft Environmental Impact Statement for Southeast High-Speed Rail Corridor (SEHSR)_ME 0544, Richmond, Virginia to Raleigh, North Carolina. North Carolina Department of Transportation

Responsible for final tasks associated with Southeast High Speed Rail Tier II EIS. Coordinated production of Record of Decision (ROD) and planning for post-ROD public meetings. Michael Baker prepared a Tier II draft environmental impact statement for the Southeast High-Speed Rail Corridor between Richmond, Virginia, and Raleigh, North Carolina. The project proposed to implement approximately 180 miles of high-speed rail along the former Seaboard Air Line Railroad and the existing CSX railroad. This was part of an overall plan to extend high-speed passenger rail service from the Northeast Corridor, which runs between Boston, Massachusetts, to Washington, D.C., southward from Washington, D.C., to Charlotte, North Carolina.

Senior Planner

West Street Extension Environmental Assessment and Finding of No Significant Impact, Raleigh, North Carolina. City of Raleigh

Served as Project Manager and Lead Analyst responsible for the production of an Environmental Assessment/ FONSI. Also supervised agency coordination and public involvement.

Michael Baker performed an environmental assessment and prepared a finding of no significant impact for the extension of South West Street between West Cabarrus Street and West Martin Street in downtown Raleigh, through the Boylan Railroad Wye. In addition, the environmental assessment evaluated the closure of the at-grade railroad crossing at West Cabarrus Street. Michael Baker's services included field investigations; analyses of natural resources, cultural resources, community impacts, noise, and air quality; a design alternatives analysis; agency and stakeholder coordination, including railroads; and public involvement.

Project Manager

NC 11 Transportation Improvements, Lenoir and Pitt Counties, North Carolina. North Carolina Department of Transportation

Responsible as the Project Manager for preliminary design and environmental study. Michael Baker provided planning and engineering services for the upgrade of NC 11 to interstate standards from NC 148 (Harvey Parkway) extension to Greenville Southwest Bypass in Lenoir and Pitt counties in North Carolina. Tasks included conceptual alternatives screening, preliminary roadway design, traffic forecasting and capacity analysis, natural resource investigations, public involvement, air quality analysis, traffic noise analysis, community impact analysis, permit application, and creation of a State Environmental Policy Act (SEPA) environmental document.

Senior Planner

U.S. 301 Improvements, Wilson, North Carolina. City of Wilson

Served as Task Manager and Lead Analyst responsible for the production of a Programmatic Categorical Exclusion. Michael Baker provided engineering and environmental services for improvements to a 1.2-mile section of U.S. 301, from S.R. 1515 (Lipscomb Road) to S.R. 1606 (Old Black Creek Road) and an approximately 1.5-mile multiuse path extension from U.S. 301 to Herring Avenue. Michael Baker's services included project management, data collection and agency



coordination, a programmatic categorical exclusion, a community characteristics report, a natural resources technical report, public involvement, water quality permitting, traffic studies, preliminary and final design, drainage design, utility coordination and relocation design, and traffic control plans.

Senior Planner

NCDOT Feasibility Studies On-Call Contract, Statewide, North Carolina. North Carolina Department of Transportation

Responsible as the Lead Analyst for production of environmental documents. Michael Baker is providing services to the NCDOT Feasibility Study Unit to develop conceptual designs and environmental screening reports for the initial project development phase of projects identified as a need in the State Transportation Improvement Program.

Project Manager

NC 127 Widening Preliminary Design, Catawba and Alexander Counties, North Carolina. North Carolina Department of Transportation

Responsible for managing the project through initial phases of scoping, conceptual design, and environmental screening. Michael Baker provided engineering and environmental services for improvements to NC 127 from Cloninger Mill Road (S.R. 1400) to Richey Road (S.R. 1156). Michael Baker's services included project management, a noise analysis, and air quality analysis, community impact studies, oversight of a preliminary hydraulic analysis, preliminary roadway design, a state-level environmental assessment, public involvement, and regulatory agency coordination.

Project Manager

Planning and Design Limited Services Agreement, Statewide, North Carolina. North Carolina Department of Transportation

Responsible for managing the project and conduct analysis for project alternatives and coordination efforts with the client and state and federal government agencies during the project development process for this ongoing project. Michael Baker provided comprehensive engineering and environmental services for highway and interchange improvement projects under a three-year limited services agreement for planning and design. Michael Baker's services included project management, traffic analyses, right-of-way plans, hydraulic and hydrological analyses, environmental investigations and documentation, public involvement, and preliminary and final design.

Project Manager

Bridge No. 1 Replacement, Mecklenburg County, North Carolina. North Carolina Department of Transportation

Responsible for budget and schedule management, data collection, analysis, and production of a community impact assessment and Categorical Exclusion. Michael Baker is providing engineering and environmental services for the replacement of Bridge No. 1 on S.R. 1138 in Mecklenburg County, North Carolina. Services include project management, public involvement, agency coordination, preliminary hydraulic design, preliminary roadway design, and federal level categorical exclusion. The transportation management plan included a one-directional closure with offsite detour of westbound Arrowood Road traffic as well as design and implementation of temporary onsite detour crossovers. The proposed bridge required stage construction due to the high volume of traffic in this area and proximity to I-77 interchange. With these challenges in mind, the team analyzed various maintenance of traffic alternatives to develop the optimal bridge staging and traffic phasing plan.



Project Manager

U.S. 258/U.S. 64 ALT Bridge Replacement and U.S. 258 Widening, Edgecombe County, North Carolina. North Carolina Department of Transportation

Responsible for management of all aspects of a bridge replacement project. Managed the project budget, schedule, environmental tasks, public involvement, and client coordination. Coordinated project development with roadway engineers and structural engineers. Expedited selective tasks by utilizing recent experience with the owner, and utilized lessons learned from previous projects. Michael Baker provided services to widen U.S. 258 from S.R. 1601 (Colonial Road) to U.S. 64 and replace Bridge No. 320101 in Tarboro, North Carolina. Improvements included road widening and replacement of the bridge in place and construction of intersections and U.S. 64 on-ramp and off-ramp connections with U.S. 258.

Project Manager

Planning and Design Limited Services Agreement, Statewide, North Carolina. North Carolina Department of Transportation

Responsible for managing the project and conduct analysis for project alternatives and coordination efforts with the client and state and federal government agencies during the project development process for this ongoing project. Michael Baker provided comprehensive engineering and environmental services for highway and interchange improvement projects under a three-year limited services agreement for planning and design. Michael Baker's services included project management, traffic analyses, right-of-way plans, hydraulic and hydrological analyses, environmental investigations and documentation, public involvement, and preliminary and final design.



Emaly N. Simone

Environmental Planning And Resiliency Group Lead |
Michael Baker International

BIOGRAPHY

Ms. Simone has experience as an environmental scientist specializing in the communication of complex scientific concepts and results to a variety of target audiences ranging from scientists to regulators to the general public. She has assessed multiple environmental media, including groundwater, surface water, air, and land. She has technical experience with National Environmental Policy Act-compliant (NEPA-compliant) reports and practices for transportation and nuclear projects, hydrogeologic assessment and site characterization activities, remediation technologies and alternatives, vapor intrusion, water and air quality, data collection and analysis, database design and management, and quality assurance (QA). Ms. Simone developed community impact assessments, regulatory reports, scientific reports, factsheets, briefings, workshops, and webinars. She has received commendations from U.S. Environmental Protection Agency (EPA) and awards from the Renewable National Resource Foundation and the Carolina Chapter of the Society of Technical Communications.

EXPERIENCE

Environmental Planner (2021)

Feasibility Studies LSC 7000020832. North Carolina Department of Transportation

Prepared Project Scoping Reports for improvements to NC 226 in McDowell County, Lawyers Road in Union County, Gum Branch Road in Onslow County, NC 148 in Lenoir County, and US 70 in Alamance County.

Environmental Planner

NCDOT Feasibility Studies On-Call Contract, Statewide, North Carolina. North Carolina Department of Transportation

Responsible for GIS-level data gathering and development of Feasibility Studies. Michael Baker provided services to the NCDOT Feasibility Study Unit to develop conceptual designs and environmental screening reports for the initial project development phase of projects identified as a need in the State Transportation Improvement Program.

Proposed Labor Category

NEPA Planner 2 – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- B.S., Business Administration, Moore School of Business, University of South Carolina, 2021

Certifications

- WordPress, Adobe Creative Cloud Apps, Canva, Hootsuite, MailChimp, Salesforce, Microsoft Office, POS. Certified in Google Ads Search, Analytics & Digital Marketing; Certified Professional Salesperson (NASP)

**Environmental Planner****Bridge 6 Replacement. North Carolina Department of Transportation.**

Responsible for leading the project planning task. Primary responsibilities included preparation of environmental documentation and coordination among agencies, stakeholders, NCDOT staff and departments, and internal team members. Also collected and analyzed data, tracked progress, and prepared deliverables. Michael Baker is designing a new bridge replacement on existing Cypress Church Road in Moore County, North Carolina. Michael Baker is providing roadway design, structural design, and utility design and coordination. Design efforts are to minimize cost and schedule impacts to the client.

Senior Planner**HUD Environmental Analysis and Grant Application Reviews, Atlanta, Georgia. CohnReznick, LLP**

Conducted in-depth quality, consistency, and appropriateness reviews of environmental documents prepared for HUD. Specific activities included conducting technical edits and reviewing reports' methodology, conclusions, and sources to ensure that each report is correct, complete, well written, and appropriate to the proposed project. Michael Baker is providing environmental analysis and grant application reviews in support of the City of Atlanta Department of Grants and Community Development, as a sub-consultant to CohnReznick. The department serves as the lead agency for the Department of Housing and Urban Development (HUD) Environmental Reviews. Michael Baker is also providing an analysis of HUD grant applications and grant underwriting to assess the feasibility of proposed projects.

Environmental Planner**I-95 Widening and Seven Interchanges, Statewide, North Carolina. North Carolina Department of Transportation**

Prepared environmental consultations to update anticipated impacts as a result of design changes since the CEs were signed. Evaluated sidewalk options and potential funding. Michael Baker provided comprehensive planning and engineering design services to complete 13 miles of I-95 widening including seven interchanges. Michael Baker's services include project management, environmental documents, roadway and structure design, utility coordination, transportation management plans, and traffic signal and signing design. Utility coordination impacts include Duke Energy Progress transmission power, distribution power, telephone, Spectrum CATV, Piedmont Natural Gas transmission and distribution, water, and sewer. The project requires a highly accelerated schedule to deliver letting plans four years earlier than projected.

Community Planner**NCDOT_B-5984. North Carolina Department of Transportation**

Led planning, public involvement, and community studies efforts on this bridge replacement project. Specific activities included coordination with agencies and local officials, conducting a pedestrian study to determine origins and destinations, evaluating impacts by alternative, and preparing a Community Impact Assessment. Key issues included determining accommodations for pedestrians and bicycles in this Environmental Justice area.

Task Manager**NC 215 Environmental Impact Statement, Transylvania County, North Carolina. North Carolina Department of Transportation, PDEA**

Led task to prepare Community Impact Assessment. Provided technical support for other environmental documents, including Draft Environmental Impact Statement, Visual Impact Assessment, and Constructability Report. Technical duties



included data analysis, coordination with federal agencies, drafting report sections, providing technical and editorial reviews, and addressing reviewer comments. Michael Baker developed a draft environmental impact statement for proposed improvements to NC 215, from U.S. 64 to S.R. 1326 (Macedonia Church Road). As a prime consultant, Michael Baker's services included preparation of the constructability report, a visual impacts assessment for impacts to U.S. Forest Service resources, preparation of a natural resources technical report, stream and wetland delineations, endangered species surveys, community impact assessment, indirect and cumulative effects assessment, and traffic noise analysis report. Michael Baker also developed the draft Department of Transportation Section 4(f) evaluation and led public involvement and agency coordination activities.

Team Member**Tier II Draft Environmental Impact Statement for Southeast High-Speed Rail Corridor (SEHSR)_ME 0544, Richmond, Virginia to Raleigh, North Carolina. North Carolina Department of Transportation**

Provided environmental analysis, technical and editorial reviews, and meeting coordination. Developed a relational database to improve efficiency and accuracy in processing and analyzing farmland soils. Michael Baker prepared a Tier II draft environmental impact statement for the Southeast High-Speed Rail Corridor between Richmond, Virginia, and Raleigh, North Carolina. The project proposed to implement approximately 180 miles of high-speed rail along the former Seaboard Air Line Railroad and the existing CSX railroad. This was part of an overall plan to extend high-speed passenger rail service from the Northeast Corridor, which runs between Boston, Massachusetts, to Washington, D.C., southward from Washington, D.C., to Charlotte, North Carolina.

Project Manager**Surrett Drive Widening, Randolph and Guilford Counties, North Carolina. North Carolina Department of Transportation**

Responsible for preparing for and participating in public and local officials meeting, collaborating with agencies, NCDOT units, and local officials to identify and minimize environmental, historic, and socioeconomic impacts from the project, and preparing the Community Impact Assessment. Michael Baker provided planning, engineering, and design services to widen Surrett Drive and improve its intersections. Surrett Drive is an important north-south route through Randolph County connecting I-85 to Business I-85 and High Point. Michael Baker's services included data collection, scoping, coordination activities, development of alternative concepts, capacity analysis, natural resource surveys and a NRT, public involvement, right-of-way plans, environmental documentation, roadway design, utility coordination, signalization, traffic phasing, and railroad coordination.

Project Manager**NCDOT I-5877 I-95 Interchange Improvements, Harnett County, North Carolina. North Carolina Department of Transportation**

Responsible for serving as planning lead for this interchange improvement project. Responsibilities include conducting research, preparing for and participating in the Internal Scoping Meeting, and developing the Community Characteristics Report and Indirect and Cumulative Effects Appendices. Collaborated with agencies and NCDOT units to identify and minimize historic, socioeconomic, and environmental impacts while achieving the purpose and need for the project. Additional responsibilities included public involvement and completing the categorical exclusion. Michael Baker performed planning, engineering, and design services for the North Carolina Department of Transportation's I-95 improvement project at Bud Hawkins Road and Long Branch Road interchanges. The project fell under two task orders.



For the first task, Michael Baker provided data collection, a community characteristics report, and agency start-of-study letters. Under the second task, Michael Baker provided traffic forecasts, architectural and archeological surveys, noise, air quality, and environmental studies, roadway and structural design, signing, signalization, and pavement marking, public involvement, as well as utility coordination, cost estimates, and public engagement.

Environmental Planner

I-95 Harnett County Lane Widening Project, Harnett County, North Carolina. North Carolina Department of Transportation

Served as planning lead for 26-mile widening project. Responsible for agency coordination, public involvement, community studies, environmental documentation. Michael Baker provided comprehensive planning and engineering design services to complete 13 miles of I-95 widening including seven interchanges. Michael Baker's services included project management, environmental documents, roadway and structure design, utility coordination, transportation management plans, and traffic signal and signing design. The project, which was located from Exit 70 to Exit 81 on I-95, involved widening from four to eight lanes and required a highly accelerated schedule to deliver letting plans four years earlier than projected.

Project Manager

R-5823: NC 65/NC 68 Widening, Guilford & Rockingham Counties, North Carolina. North Carolina Department of Transportation

Responsible for client and agency coordination, community and stakeholder outreach, community studies, and impact assessment. Michael Baker is providing engineering and environmental services for the widening of NC 68 from the intersection with NC 65 to the intersection with U.S. 220 in Guilford and Rockingham Counties, North Carolina.



Terry L. Burhans, Jr.

Environmental Scientist | Michael Baker International

BIOGRAPHY

Mr. Burhans is an environmental scientist with exemplary analytical and technical writing skills. He has experience in transportation planning, landscape level geospatial analysis and GIS analysis, project management and collaboration, stream and wetland identification, protection, restoration and mitigation, state and federal environmental permitting, endangered species surveys and conservation planning including conservation measures development, implementation, and monitoring. Mr. Burhans also has an interest in Stream and Wetland Ecology, and Soil and Water Science. Mr. Burhans' additional experience is in research entomology, outreach education, and marketing including video production and social media development. Mr. Burhans has specific experience in permitting under the Clean Water Act (Section 404, Section 10, Section 401) NPDES Permitting, Essential Fish Habitat Assessments, US Coast Guard Bridge Permits, Federal Coastal Consistency Documentation, Endangered Species Act Compliance, and NEPA and SEPA Documentation.

EXPERIENCE

Environmental Scientist

Bridge No. 54 Replacement, Mecklenburg County, North Carolina. North Carolina Department of Transportation

Principal Investigator for Natural Environment Systems responsible for Natural Systems surveys including, Stream Identification and Wetland Delineation, Aquatic feature valuation including NCWAM and NCSAM, Endangered Species Surveys, Natural Communities Assessment and Report and Figure Generation. Michael Baker is providing engineering and environmental services for the replacement of Bridge No. 54 on NC 160 in Mecklenburg County, North Carolina. Services include project management, public involvement, community impact assessment, agency coordination, preliminary roadway design, and federal level categorical exclusion.

Proposed Labor Category

NEPA Planner 1 – Task Area 17

Proposed Task Areas

17. Environmental Review

Education

- M.S., Forestry, West Virginia University, 2012
- B.S., Environmental Sciences, University of California, Riverside, 2010
- Graduate Studies, 0, Soil Science, Texas Tech University

Certifications

- Certified Professional Soil Scientist, 2017, 406082
- Confined Space Training, West Virginia, 2015, BBCSE00CEN
- CPR Certified
- PEC Safety Certification, West Virginia, 2014, PEC100474438
- SafeLandUSA Training, West Virginia, 2014, PEC100474438

**Environmental Scientist****Bridge No. 88 Replacement, Mecklenburg County, North Carolina. North Carolina Department of Transportation**

Principal Investigator for Natural Environment Systems. Responsible for Natural Systems surveys including, Stream Identification and Wetland Delineation, Aquatic feature valuation including NCWAM and NCSAM, Endangered Species Surveys, Natural Communities Assessment and Report and Figure Generation. Michael Baker is providing engineering and environmental services for the replacement of Bridge No. 88 on NC 49 in Mecklenburg County, North Carolina. Services include project management, public involvement, community impact assessment, agency coordination, preliminary roadway design, and federal level categorical exclusion.

Environmental Scientist**Hurricane Florence Recovery Bridge Replacements at Marine Corps Base Camp LeJeune, Marine Corps Base Camp Lejeune, Jacksonville, North Carolina. NAVFAC Mid-Atlantic**

Responsible for Environmental Permit Acquisition including site investigations for stream and wetland delineations, endangered species surveys followed by Clean Water Act permitting (Section 404, Section 401, Section 10), Essential Fish Habitat Assessments, Federal Consistency Documentation, US Coast Guard Bridge Permitting, and Construction Stormwater Permitting. Additional duties included Base and Agency Coordination, site inspections, NEPA documentation, and site design recommendations. Michael Baker is providing engineering and design services for the design-build replacement of three bridges that were damaged during Hurricane Florence. The bridges are included in two projects – Project No. P1387F and Project No. P1505F. Proposed actions associated with Project P1387F include the replacement and demolition of the Onslow Beach Bridge (SBA 129), an existing 66-year-old swing bridge that crosses the Atlantic Intracoastal Waterway and is the single permanent transportation link between Onslow Beach and Camp Lejeune. Project P1505F includes the replacement of the White Oak River Trestle Bridge (S882) and the Queen Creek Trestle Bridge (S880) in North Carolina along the railroad route from MCB Camp Lejeune and Marine Corps Air Station Cherry Point. Michael Baker is supporting both projects by providing specific design and engineering support in the civil, roadway, structural, and environmental disciplines. Tasks include roadway designs, bridge designs, and environmental studies and permit applications for the projects.

Principal Investigator**I-95 Widening and Seven Interchanges, Statewide, North Carolina. North Carolina Department of Transportation.**

Responsible for Natural Systems surveys including, Stream Identification and Wetland Delineation, Aquatic feature valuation including NCWAM and NCSAM, Endangered Species Surveys, Natural Communities Assessment, Report and Figure Generation; Coordination with State and Federal Agencies for Jurisdictional Determination and Permitting Amendments under Section 404 and 401 of the Clean Water Act. Michael Baker is providing comprehensive planning and engineering design services to complete 13 miles of I-95 widening including seven interchanges. Michael Baker's services include project management, environmental documents, roadway and structure design, utility coordination, transportation management plans, and traffic signal and signing design. Utility coordination impacts include Duke Energy Progress transmission power, distribution power, telephone, Spectrum CATV, Piedmont Natural Gas transmission and distribution, water, and sewer. The project requires a highly accelerated schedule to deliver letting plans four years earlier than projected.

**Team Leader****Surrett Drive Widening, Randolph and Guilford Counties, North Carolina. North Carolina Department of Transportation**

Responsible for field work and report generation for Natural Environment Services including Stream and Wetland Delineation and assessment and protected species surveys for the Natural Resources Technical Report and Jurisdictional Determination of aquatic resources found throughout the project area. Michael Baker provided planning, engineering, and design services to widen Surrett Drive and improve its intersections. Surrett Drive is an important north-south route through Randolph County connecting I-85 to Business I-85 and High Point. Michael Baker's services included data collection, scoping, coordination activities, development of alternative concepts, capacity analysis, natural resource surveys and a NRTR, public involvement, right-of-way plans, environmental documentation, roadway design, utility coordination, signalization, traffic phasing, and railroad coordination.

Environmental Scientist**R-5823 N.C. 65 & N.C. 68 Widening, Guilford & Rockingham Counties, North Carolina. North Carolina Department of Transportation**

Responsible for field work and report generation for Natural Environment Services including Stream and Wetland Delineation and assessment and protected species surveys for the Natural Resources Technical Report and Jurisdictional Determination of aquatic resources found throughout the project area. Michael Baker provided support for the widening of N.C. 65 and N.C. 68 in Guilford and Rockingham Counties, North Carolina. Our team organized traffic count collection, project-level traffic forecasting, crash analysis, capacity analysis, and built concept development for the corridor.

Environmental Scientist**West Site Nationwide Permit, Piedmont Triad International Airport (GSO), Greensboro, North Carolina. Piedmont Triad Airport Authority**

Responsible for Natural Systems surveys including, Stream Identification and Wetland Delineation, Aquatic feature valuation including NCWAM and NCSAM, Endangered Species Surveys, Natural Communities Assessment and Report and Figure Generation. Also responsible for coordination with State and Federal Agencies for Jurisdictional Determination and Permitting under Section 404 and 401 of the Clean Water Act. Michael Baker is providing environmental permitting services for the routing of an access road at the current Regional Road terminus, along the south side of I-73, to the airport's West Site. Since the route could contain two unavoidable stream crossings, Michael Baker will compile information to support a Section 404 nationwide permit and associated State (NC) 401 Water Quality Certification for the crossings that would comply with the preconstruction notification required by the United States Army Corps of Engineers and the North Carolina Department of Environmental Quality Division of Water Resources. This information includes prior project history, a proposed impacts inventory, impact justification and mitigation, stormwater management and diffuse flow plan, and supplementary information.

Planner**U.S. 301 Improvements, Wilson, North Carolina. City of Wilson**

Responsibilities included contributions to the Categorical Exclusion as well as Agency Coordination and USFWS Consultation. Michael Baker provided engineering and environmental services for improvements to a 1.2-mile section of U.S. 301, from S.R. 1515 (Lipscomb Road) to S.R. 1606 (Old Black Creek Road) and an approximately 1.5-mile multiuse path extension from U.S. 301 to Herring Avenue. Michael Baker's services included project management, data collection and



agency coordination, a programmatic categorical exclusion, a community characteristics report, a natural resources technical report, public involvement, water quality permitting, traffic studies, preliminary and final design, drainage design, utility coordination and relocation design, and traffic control plans.

Environmental Scientist**R-3403B, U.S. 17 Widening, Craven County, North Carolina. North Carolina Department of Transportation**

Responsible for field work and report generation for Natural Environment Services including Stream and Wetland Delineation and assessment and protected species surveys for the Natural Resources Technical Report and Jurisdictional Determination of aquatic resources found throughout the project area. Michael Baker is providing engineering services for the 7.5 miles of widening U.S. 17 from S.R. 1433 (Antioch Road) to N.C. 43 from a two-lane facility to a four-lane, median-divided facility with partial control of access in Craven County, North Carolina. The project scope includes three culvert replacements, a 600-foot-long bridge over Little Swift Creek, and the conversion of an at-grade intersection with a Norfolk Southern spur line to a grade separation with a single span structure. Services include roadway design, structure design, utility coordination, traffic control, signing, pavement marking, traffic signals, environmental permitting, meetings and coordination, railroad coordination, traffic forecast and analysis, natural resources technical report, re-evaluation of the state finding of no significant impact, community characteristic memorandum preparation, and historic architecture and archaeology coordination.

Environmental Scientist**Greenway Design, Permitting Services, and Construction Documentation, Summerfield, North Carolina. Town of Summerfield**

Responsible for Natural Systems surveys including, Stream Identification and Wetland Delineation, Aquatic feature valuation including NCWAM and NCSAM, Endangered Species Surveys, Natural Communities Assessment, Report and Figure Generation; Coordination with State and Federal Agencies for Jurisdictional Determination and Permitting under Section 404 and 401 of the Clean Water Act and Section 7 of the Endangered Species Act. Michael Baker is developing the final designs and providing permitting and construction documents for a proposed 2.55-mile-long greenway that provides walking and biking access with a 10-foot-wide asphalt surface. Michael Baker's responsibilities include hydrologic/hydraulic designs, erosion and sedimentation control permitting, agency coordination, natural resources investigations, 401/404 permitting, programmatic categorical exclusion, local permitting, and meetings and coordination.



Kyle T. Crager

Civil Engineer V | Michael Baker International

BIOGRAPHY

Mr. Crager is a Senior Civil Engineer with a diverse background in project management, design, permitting, bidding, and construction phase services with water, wastewater, stormwater, solid waste and site development projects for public and private clients. Typical projects include potable water distribution systems, sanitary sewer collection systems, water & sewer pump stations over 1 MGD, sewer rehabilitation, comprehensive land development, hydraulic studies, landfill design and permitting, and stormwater projects.

EXPERIENCE

Project Manager

Ridgeville Commerce Park Regional Water, Ridgeville, South Carolina. Dorchester County Water & Sewer

Project Manager for survey, design, permitting and construction administration of a water system built to serve Ridgeville Commerce Park and the adjoining region. The system consisted of a 750,000-gallon composite concrete elevated water tower, 10,000 LF of distribution line and a 650-gallon per minute potable well, including a small treatment building and hydropneumatic tank. The system was designed in 2017 and construction of portions of the system were completed in 2018. Construction of all contracts is scheduled for completion in 2019. Budget: \$4.5 Million

Project Manager

Whitley Branch Hazard Mitigation Project, Kentucky. City of London, Laurel County, Kentucky

Project Manager for assisting the City of London with a FEMA HMGP project aimed at reducing flooding probability within a flood prone area of the city. The project consisted of analyzing a 234-acre watershed, identifying restrictive existing structures and designing two remediation sites to correct the problems without negatively affecting the downtown district environment. The project was designed in 2012 and constructed in 2013. The owner reported observing a design level rainfall event in early 2014, and experienced no further structure flooding within the watershed.

Proposed Labor Category

Civil Engineer V – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 2006, Agricultural and Environmental Engineering, University of Kentucky

Certifications

- Professional Engineer, North Carolina, 2019, 048522
- Professional Engineer, South Carolina, 2014, 31886

Professional Affiliations

- American Council of Engineering Companies (ACEC)
- American Public Works Association (APWA)
- American Water Works Association (AWWA)
- Water Environment Federation (WEF)



Budget: \$1.4 Million.

Project Manager

Canal Embankment Repair, South Carolina. City of Columbia

Responsible for overseeing repair of pedestrian facilities associated with the Columbia Canal repair project. Michael Baker is providing professional engineering services, permitting, and construction administration for the canal embankment repair along the Three Rivers Greenway. The project includes three sites that were impacted from the October 2015 floods throughout South Carolina. Michael Baker is responsible for preparing repair plans for two of the existing pedestrian bridges and an observation deck. Michael Baker's services include project management, preliminary and final pedestrian and structural design, wetland investigation, city and agency coordination, permitting, bidding-phase support, and construction administration.

Project Manager

COC Utility Relocation, Columbia, South Carolina. City of Columbia

Responsible for overseeing the design team for this project including on-call relocation design, coordination, permitting, and construction services. Michael Baker is providing services for an on-call contract for utility coordination, design, permitting, and construction coordination of numerous water relocations associated with roadway projects in the city of Columbia's water service area.

Project Manager

Columbia Resilient Water Supply Project, Columbia, South Carolina. City of Columbia

Responsible for serving as the project manager for design, permitting and construction services for a new 80-MGD raw water intake for the City of Columbia's Canal water treatment plant.

Design Review Manager

Dunean Mill Village Collection Sewer System Improvements, Greenville, South Carolina. MetroConnects

Responsible for overseeing project delivery and execution. Michael Baker designed the replacement of a portion of a failing collection sewer system in the Dunean Mill Village in Greenville, South Carolina. The project replaced approximately 13,000 linear feet of 8- and 10-inch gravity sewer lines, lateral installations, and construction within the roadway.

Consultant

Dunean Mill Water Main Replacement, Greenville, South Carolina. Greenville Water

Responsible for Michael Baker's project team for project delivery of a Mill Village water distribution system rehabilitation project. Michael Baker is providing survey and engineering services for the replacement of approximately 4,500 linear feet of new 8-inch and 6-inch water lines to replace deteriorated galvanized smaller diameter mains in the Dunean Mill Village in Greenville, South Carolina.

Project Manager

Gills Creek Relief Sewer, Columbia, South Carolina. City of Columbia

Served as the project manager for design and permitting for the installation of 6,500 linear feet of 36-inch relief sewers. Michael Baker is providing engineering services for this project to provide capacity relief to the lower Gills Creek watershed in Columbia, South Carolina. The design consists of 6,500 linear feet of 36-inch DIP sewer relief and 1,700 linear feet of 48-inch DIP gravity sewer via open cut, microtunneling, and jack and bore. The project will provide an additional 10 MGD of capacity to this lower trunk section of the city's existing sewer collection system.

**Design Engineer****Hurricane Florence Recovery Bridge Replacements at Marine Corps Base Camp LeJeune, Marine Corps Base Camp Lejeune, Jacksonville, North Carolina. NAVFAC Mid-Atlantic**

Responsible for managing the design of water and sewer facilities. Michael Baker is providing engineering and design services for the design-build replacement of three bridges that were damaged during Hurricane Florence. The bridges are included in two projects – Project No. P1387F and Project No. P1505F. Proposed actions associated with Project P1387F include the replacement and demolition of the Onslow Beach Bridge (SBA 129), an existing 66-year-old swing bridge that crosses the Atlantic Intracoastal Waterway and is the single permanent transportation link between Onslow Beach and Camp Lejeune. Project P1505F includes the replacement of the White Oak River Trestle Bridge (S882) and the Queen Creek Trestle Bridge (S880) in North Carolina along the railroad route from MCB Camp Lejeune and Marine Corps Air Station Cherry Point. Michael Baker is supporting both projects by providing specific design and engineering support in the civil, roadway, structural, and environmental disciplines. Tasks include roadway designs, bridge designs, and environmental studies and permit applications for the projects.

Project Manager**Lower Crane Creek EQ Storage, Columbia, South Carolina. City of Columbia, SC**

Project manager responsible for construction inspection project for installation of an 8-MG equalization basin. Michael Baker is providing owners management services during construction including construction management, resident project inspection and overseeing construction materials testing for the installation of a new 12-million-gallon equalization basin and pump station for the City of Columbia's Crane Creek sewer basin.

Project Engineer**Miscellaneous Lift Station Improvements, Columbia, South Carolina. City of Columbia**

Responsible for the design, permitting, and construction administration of the rehabilitation of 12 existing City of Columbia sewer lift stations. Michael Baker is providing engineering services for the rehabilitation of eight existing pump stations within the city of Columbia system. Tasks include consultation, design, permitting, bidding, construction administration, and inspection services.

Engineering Manager**Olympia Village Sewer Rehabilitation, Olympia Mills District, Columbia, South Carolina. City of Columbia**

Responsible for mill village sewer rehabilitation project. Michael Baker is designing approximately 17,500 linear feet of new 8-inch, 10-inch and 12-inch gravity sewers, and rehabilitating approximately 15% of the existing system to serve the historic Olympia Mills district of Columbia, South Carolina. Construction methodologies deployed include cured-in-place pipe (CIPP) lining, pipe bursting and new construction to maximize results while minimizing capital outlay to correct largely defunct sewer within the 350-home residential district. Critical components to the success of this project include robust public engagement, agency coordination, cost effective rehabilitation design, assessment of property and community impacts, and 'right-sized' scope for construction services.

Project Manager**Riverfront Canal Repair, Columbia, South Carolina. City of Columbia**

Responsible for project oversight and project manager duties. Michael Baker is providing multi-disciplined engineering services for the complete assessment and design on a design-bid-build project for restoration of the Columbia Canal. Michael Baker's services include project management; civil, hydrologic, structural, and environmental assessments;



restoration design; and construction administration. The proposed Canal reconstruction and new water intake facility will both have adverse effects on the National Register-listed Canal and associated archaeological sites. The project requires extensive coordination with government agencies, including the Federal Emergency Management Agency, the Federal Energy Regulatory Commission, South Carolina Department of Health and Environmental Control, South Carolina Fish and Wildlife, South Carolina Department of Natural Resources, and the South Carolina Historic Preservation Office.

Project Manager

Sewer Improvements Phase 1, Columbia, South Carolina. City of Columbia

Responsible for the design, permitting, and construction administration of 13,500 LF of 20-inch and 30-inch gravity sewer for the City of Columbia associated with a capacity improvement project. Michael Baker is working for the City of Columbia and CleanWater2020 for a full-service project delivery of 13,500 linear feet of 21-inch and 30-inch gravity sewer replacement as part of a capacity improvement project. The project consists of preliminary evaluation, design, construction sequencing and bypass pumping design, trenchless construction design, and all additional facets of a large diameter trunk sewer replacement project.

Design Engineer

Midnight/Oates Water and Sewer Relocations, North Carolina. North Carolina Department of Transportation

Responsible for managing the relocation design of water and sewer facilities. Michael Baker provided design and oversight for water and sewer relocations for a roadway improvement project. Work included utility coordination with the client, town of Mooresville, and North Carolina Department of Transportation for the design of 6-inch to 16-inch finished water lines, 12-inch to 36-inch raw water lines, and 8-inch gravity sewer lines.

Project Manager

US 19/64/74/129 Corridor Traffic Estimate and Traffic Analysis, Murphy, North Carolina. North Carolina Department of Transportation

Serving as the water and sewer relocation design manager. Michael Baker completed future traffic estimate and traffic analyses for the US 19/64/74/129 project corridor, which included four stop-controlled and one signalized intersection. Michael Baker also prepared the construction phasing, transportation management plan, signal modification design, signing and pavement marking, and roadway design plans for the final design.

Design Engineer

Western Div 2018 P&DSC and GESC On-Call 7000019115. North Carolina Department of Transportation

Responsible for managing the relocation design of water and sewer facilities.

Pipeline Engineer

NCDOT R-5861 Cherokee. Town of Murphy

Serving as the project manager for relocation design and permitting for water and sewer relocations.

Senior Engineer

NCDOT R-5861 Cherokee. Town of Murphy

Serving as the project manager for water and sewer relocation design and permitting.



Kathleen M. McKeithan

Civil Engineer V | Michael Baker International

BIOGRAPHY

Ms. McKeithan has extensive experience in the environmental sector, specializing in resiliency related to water resources. Her expertise encompasses a broad range of areas including watershed assessment, planning, geomorphic assessment, permitting, design, construction management/inspection, erosion and sedimentation control, greenways, best management practices (BMPs)/stormwater control measures (SCMs), stormwater analysis, hydrologic and hydraulic (H&H), sustainability, and remediation projects across diverse geographic settings.

As both a designer and manager, Ms. McKeithan is passionate about overseeing long-term environmental projects from initial concept through to post-construction monitoring.

EXPERIENCE

Senior Engineer

Pinebridge Stormwater Design, Mayland Community College, Spruce Pine, North Carolina. Mayland Community College

Responsible for site assessment, design, engineering, and construction plans. Michael Baker provided innovative design solutions through construction oversight for the Pinebridge site in North Carolina through several grant sources and local matches, including the NC Clean Water Management Trust Fund, the Phillips Foundation, and CCAP. The overall concept was to develop a living learning campus that showcases sustainability by turning the entire campus into an outdoor classroom. Design was provided to maximize the available space for use as stormwater treatment with consideration to parking, service access, and pedestrian circulation. Tasks included meeting coordination, analysis, conceptual design, stormwater calculations, permitting, construction administration, presentation support, survey, stakeholder coordination, monitoring, and curriculum and coursework development. Upon finalization, approximately 95 percent of the stormwater generated from the retrofitted site will be treated for water quality and quantity through innovative systems.

Proposed Labor Category

Civil Engineer V – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- Graduate Studies, 2000, Biological Engineering, North Carolina State University
- B.S., 1998, Biological Engineering, North Carolina State University

Certifications

- Certified Project Manager, 2009
- Rosgen II, River Morphology and Applications, 2000
- Rosgen III, River Assessment and Monitoring, 2001
- Rosgen IV, River Restoration/Natural Channel Design, 2001
- Rosgen I, Applied Fluvial Geomorphology, 1997
- Certified Floodplain Manager, North Carolina, 2010, NC-10-0359
- Professional Engineer, North Carolina, 2002, 28432
- USDA NRCS Technical Service Provider Certification, North Carolina, 2017, TSP-14-9852
- Notary Public, North Carolina, 2014, 201406200012
- Professional Engineer, South Carolina, 2014, 31401
- Professional Engineer, Tennessee, 2005, 109480
- Certified Professional in Erosion and Sediment Control, USA, 2005, 2546
- Certified Professional Storm Water Quality, USA, 2003, 135
- Professional Engineer, Virginia, 2007, 0402043644

Professional Affiliations

- National Wildlife Federation
- North Carolina Wildlife Federation
- Trout Unlimited (TU)

**Project Manager****Greenway Design, Permitting Services, and Construction Documentation, Summerfield, North Carolina. Town of Summerfield**

Responsible for project management, field observations, and submittal of quality assurance/quality control. Michael Baker is developing the final designs and providing permitting and construction documents for a proposed 2.55-mile-long greenway that provides walking and biking access with a 10-foot-wide asphalt surface. Michael Baker's responsibilities include hydrologic/hydraulic designs, erosion and sedimentation control permitting, agency coordination, natural resources investigations, 401/404 permitting, programmatic categorical exclusion, local permitting, and meetings and coordination.

Environmental Engineer**FEMA Professional and Technical Services (PTS), Puerto Rico and New Hampshire. FEMA**

Responsible for coordinating delivery of PTS tasks. Michael Baker provided professional and technical services for the 2023 Annual Report. The Technical Mapping Advisory Council (TMAC) was asked to look at possibilities for redefining the special flood hazard area (SFHA), how fill placed in the SFHA should be handled for flood plain management and mandatory insurance purchase purposes, recommendations on use of 2D modeling and methods for sharing complex visual and data information with the public. ARC's support of TMAC activities for this report included identifying and scheduling 35 focus groups of three to six members each to present the TMAC's initial thinking on these issues and gather insights and input from focus group participants to help shape the TMAC's ultimate recommendations. Audiences for focus groups included state floodplain managers, local and community officials, state officials, lenders, and developers. Each focus group was recorded and transcribed as well as summarized in live notes taken by the ARC team. Reports of findings from the focus groups were incorporated into the final 2023 Report to Congress.

Project Manager**Russell Gap Stream Mitigation, Alexander County, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services**

Responsible for the site's restoration design, permitting, construction plans, construction oversight and post-construction monitoring fieldwork and documentation.

Design Engineer**Westside Creek Restorations, San Antonio, Texas. U.S. Army Corps of Engineers, Tulsa District**

Responsible for overseeing natural channel design elements. Michael Baker is providing environmental restoration measures for Apache Creek, San Pedro Creek, Alazan Creek, and Martinez Creek in San Antonio, Texas, as part of the San Antonio Channel Improvements Project and Westside Creeks Restoration Project. Tasks include hydrology and hydrological analysis, civil design, cost estimating, construction scheduling, value engineering, and bidding-phase support services. The team is also providing pilot channel design, flood level analysis, creek alignment, and geotechnical analysis.

Project Manager**Whittier Creek Mitigation Project. North Carolina Department of Environmental Quality Division of Mitigation Services**

Responsible for site assessment, site restoration design, permitting, construction plans, construction oversight and post-construction monitoring fieldwork and documentation.



Project Manager

Big Branch Mitigation, Alexander County, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Responsible for project management, landowner coordination, design review, permitting, and implementation of the project.

Project Manager

Cullowhee Creek Restoration, Jackson County, North Carolina. USDA Natural Resources Conservation Services

Responsible for site implementation including construction oversight, NRCS documentation, and TSP close out forms. Michael Baker provided stream design services for 1,663 linear feet of Cullowhee Creek, a cold water stream and designated trout water flowing through an agricultural parcel, near Sylva, North Carolina. The purpose of this project was to support the Western North Carolina Stream Initiative by improving degraded stream and riparian conditions. Michael Baker's services included collecting baseline field data on existing conditions, obtaining all necessary environmental permits, producing final design, overseeing construction, and conducting close-out investigations to ensure thorough completion of the project to design specifications.

Project Manager

Relocation of Holly Springs Road and Stream Restoration, Mount Airy-Surry County Airport (MWK), Surry County, North Carolina. Mt. Airy/Surry County Airport Authority

Responsible post-construction monitoring fieldwork and documentation including site close out documentation. Michael Baker provided engineering services for the relocation of Holly Springs Road (S.R. 1627) to enable the extension of Runway 18-36 and Taxiway A and the construction of the Taxiway A turnaround. The project also included permitting for the runway and taxiway extension and turnaround and the restoration of more than 5,200 linear feet of incised streams in an unnamed tributary to Cooks Creek to offset jurisdictional stream impacts from the airport construction. Michael Baker's services included project management, existing condition surveys, utility coordination, preliminary and final design, permitting, bidding-phase services, and agency coordination, and construction management for the stream mitigation.

Project Engineer

Tributaries of Brown Creek, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Responsible for assisting with annual monitoring activities. Michael Baker restored 8,213 linear feet of perennial stream, enhanced 2,481 linear feet of stream, and preserved 518 linear feet of stream along Hurricane Creek and unnamed tributaries to Brown Creek, a 303(d) listed stream that flows through the Pee Dee National Wildlife Refuge in Anson County, North Carolina. Tasks included site assessments, project permitting, FEMA hydraulic analysis, stream restoration design work, construction management, buffer reestablishment, invasive species control, and a seven-year monitoring effort.



Cody D. Batchelder

Civil Engineer III | Michael Baker International

BIOGRAPHY

Mr. Batchelder brings over a decade of experience in several aspects of civil engineering, including ecosystem restoration, stormwater/flood/erosion and sedimentation control design, and residential and commercial site development projects from concepts to construction drawings. Mr. Batchelder's wide-ranging experience gives him the flexibility to work on many types and aspects of projects. Mr. Batchelder's certifications include Professional Engineer (NC), USDA NRCS Technical Service Provider, and Stream Bank Repair Certification, and he has extensive experience in multiple modeling programs, including HydroCAD, Hydraflow Storm Sewers, HEC-RAS, Bentley WaterCAD, EPANET, AutoCAD Civil 3D, and AutoCAD Express. Mr. Batchelder has experience working with multiple permitting agencies, including NCDEQ, Metropolitan Sewerage District of Buncombe County (MSDBC), US Army Corps of Engineers, the State Construction Office (SCO), and many municipalities throughout North Carolina.

EXPERIENCE

Project Engineer

Exchange at Holly Springs, Holly Springs, North Carolina

Responsible for conceptual design, permitting, and construction drawings of a 316-unit apartment complex. This project required learning all aspects of Town of Holly Springs development standards and codes without any prior experience in this municipality and consistent coordination with many other parties to maintain a strict schedule, including the engineer with the adjacent development and approved Master Plan, the developer, plan reviewers from the Town of Holly Springs, landscape architect, and current landowner. Site constraints included on-site wetlands and streams that required careful planning meet regulations.

Engineer

Patton High School Stormwater Design, Morganton, North Carolina. Burke County Board of Education

Responsible for design of stormwater wetland, site grading, construction oversight, permitting, and client coordination. Michael Baker is providing

Proposed Labor Category

Civil Engineer III – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 2012, Civil Engineering, Rose-Hulman Institute of Technology

Certifications

- Certified PADI Scuba Diver, 2017
- Stream Bank Repair Certification, North Carolina, 2020
- Professional Engineer, North Carolina, 2017, 046012
- USDA NRCS Technical Service Provider Certification, North Carolina, 2021, TSP-20-23343



design and construction oversight for a stormwater control measure (SCM) for Robert L. Patton High School, contributing to water quality and water quantity improvements, including 15,235 SF of storage. The drainage area flowing to the SCM is approximately 17 acres, and includes roadway, parking lot, running track, steep slopes, and lawns. The site drains into Fiddler's Run. Design, permit acquisition, and bidding is completed for this project, and construction is expected to begin in Fall 2022. Michael Baker provided engineering, technical, and wetland design services for a stormwater control measure at Patton High School. Tasks included survey, design, stakeholder engagement, soil testing, permitting, interpretive signage design, invasive species control, and bid support.

Project Manager

Haywood Habitat for Humanity, Waynesville, North Carolina

Responsible for initial planning, permitting, and construction documents for a 10-unit subdivision. The client was a non-profit and budgets were slim, so the most cost-effective solutions were mandatory with grading homes on steep slopes, stormwater management, water, and sewer. Communication and coordination with permitting and planning personnel was essential to explore creative cost-effective solutions that would be allowable and permitted.

Engineer

Blair Creek Mitigation Project, Clay County, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Responsibilities included quantity estimates and erosion control permitting. Michael Baker identified and secured the Blair Creek Mitigation Site in Clay County, North Carolina. A mitigation plan has been developed that provides a stream restoration design for four stream reaches and their associated riparian wetlands within the stream buffer. A survey and conservation easement have been completed. Additionally, Michael Baker is conducting construction to implement the restoration design and providing monitoring for seven years post construction.

Environmental Specialist

City of Raleigh Parks, Recreation and Cultural Resources On-Call Contract #294, Raleigh, North Carolina. City of Raleigh

Michael Baker is providing design, engineering, permitting, construction assistance, and project management as part of an on-call contract to provide connections to gaps between communities, parks, and greenways for the Neighborhood and Community Connections program. To date, Michael Baker has provided services for four projects including the Battle Ridge Community to Neuse River Trail, Structure 66 Realignment, Lake Boone Trail to House Creek Trail, and Battle Ridge North to Neuse River Trail projects. Tasks include site assessment, connectivity options, geometric alignment, permitting, value engineering, cost estimating, and construction administration services.

Engineer

UT to Rush Fork Stream Mitigation Project, Haywood County, North Carolina. North Carolina Department of Environmental Quality Division of Mitigation Services

Responsibilities included quantity estimates and erosion control permitting. Michael Baker is performing stream restoration and enhancement on three unnamed tributaries to Rush Fork Creek, totaling approximately 3,600 linear feet of existing stream. A Best Management Practice will also be installed to remove nutrients and sediment coming into the stream at the head of one stream. Additionally, degraded riparian wetlands will be restored or enhanced through implementing Priority Level 1 restoration, excluding livestock, and through revegetation of the riparian buffer. The existing stream reaches have been significantly impacted by unrestricted livestock access and removal of riparian buffers. The



project stream reaches are unstable, incised, and exhibit active bank erosion from both high flows and livestock access. All the project reaches lack adequate, quality riparian buffers. Currently, the project reaches act as sources of sediment and nutrient contamination to streams in the French Broad River watershed. Michael Baker's services include surveying and mapping, sediment transport analysis, hydrologic modeling, permitting, stream channel restoration and enhancement design, revegetation design, conservation easement acquisition, and development of monitoring plans. This project will alleviate the identified problems and provide significant functional improvement at this site. Construction is planned to be completed in late 2019 and monitored for seven years.

Engineer

South Development Area, Raleigh Executive Jetport (TTA), Sanford, North Carolina. Sanford Lee County Airport Authority

Responsibilities included completion required revisions for stormwater permitting. Michael Baker provided engineering services for the additional development to the existing hangar area located to the south of the existing terminal area. The project includes site preparations for three future box hangars/associated aprons, improvement of the current taxilane to accommodate ADG II aircraft, and the connection of the existing t-hangar taxilanes to a new taxilane behind the existing t-hangars. The project also includes installation of site utilities and an expansion of the existing stormwater pond to accommodate the additional impervious surfaces.

Project Engineer

Bleachery Boulevard Storage Units, Asheville, North Carolina

Responsible for conceptual design, permitting, and construction drawings of a 750-unit, two-phase storage unit facility. The project faced two major difficulties- multiple zoning districts on-site and a late discovery of existing, shallow shot rock. GIS services showed that the site had existing split zoning, and the plan reviewer required a large property line landscaping buffer at the split, which would have reduced the size of the proposed building, and ended the project. After reading through historical deeds and plats, Cody discovered that the GIS zoning feature was not supported by legal documentation, and that there was only one existing zoning district on-site, which allowed us to reduce the property line buffer and retain the building size that the client desired. During the beginning phases of construction, previously unknown shot rock was discovered in the existing ground- this required a redesign of several features, including elevating the building above three additional feet of fill, which changed the design of drainage ditches, utilities, parking lot elevations, driveway slopes, and a proposed foundation wall, which was accomplished in a short time to keep the project on schedule.



Amanda Sharpe

Civil Engineer III | Michael Baker International

BIOGRAPHY

Since receiving a degree in Civil Engineering in 2011, Mrs. Sharpe has been a part of Michael Baker's structures unit where she has applied her in-depth understanding of the bridge and structures design process. During the past several years, she has been engaged in the design of a variety of projects, including bridge, staged construction, retaining walls, box culverts, and riser boxes. Mrs. Sharpe has participated in projects across the country including North Carolina, Arkansas, South Carolina, Ohio, and Texas.

EXPERIENCE

Bridge Designer

I-73 Final Plans, Cost and Schedule Risk Analysis, and Monte Carlo Simulation, Statewide, South Carolina. South Carolina Department of Transportation

Responsible for verifying previous design was still adequate for the duals on this project that was designed ten years ago. Michael Baker facilitated a cost and schedule risk analysis workshop and conducted a Monte Carlo simulation for the entire I-73 project from I-95 – S.C. 22 (segments A1-A8) and for the section from I-95 to U.S. 501 (segments A1-A2). The Michael Baker team developed a cost opinion, summary of quantities, and project schedule.

Structural Designer

Stream and Culvert Rehabilitation and Stabilization, Prince William County, Virginia. Prince William County

Responsible for endwall design. Stream stabilization design measures were proposed for approximately 905 linear feet of Marumsco Creek Tributary A, stream stabilization design measures were proposed for approximately 800 linear feet of Tributary No.1 to Marumsco Creek Tributary B, and stream stabilization and velocity dissipation structures were designed along approximately Bull Run Tributary A.

Proposed Labor Category

Civil Engineer III – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 2011, Civil Engineering, North Carolina State University

Certifications

- Professional Engineer, North Carolina, 2016, 043878
- Professional Engineer, South Carolina, 2022, 40806

**Structural Designer****S-83 (Hard Scrabble Road) Widening, Richland County, South Carolina. South Carolina Department of Transportation**

Designed three of the retaining walls on this project, which included a masonry facade. Michael Baker is providing engineering services for the construction to widen S-83 (Hard Scrabble Road) from SC Route 555 (Farrow Road) to S-1041 (Kelly Mill Road) for approximately 7.2 miles in Richland County, South Carolina. Michael Baker's services include project management, environmental permitting, bridge design, final roadway construction plans, traffic signal design, final hydraulic design, roadway structures, geotechnical investigations, utility coordination, construction administration and support, construction plan modifications, and construction plans phasing.

Structural Designer**Hampton Avenue Storm Drainage Improvement Project, Charlotte, North Carolina. City of Charlotte, North Carolina**

Responsible for culvert and junction box design. Michael Baker performed a study to identify alternatives for improvements to the storm drainage system and designed the drainage improvements for a 110-acre residential neighborhood. Michael Baker's services included project administration, field investigations, existing conditions analysis, stormwater management system survey, hydrologic and hydraulic analyses, modeling, floodplain impacts analysis, system sufficiency evaluation, existing environmental conditions and impacts analysis, alternatives analysis, conceptual design, cost-benefit analysis, and permitting.

Bridge Engineer**Bridge 6 Replacement. North Carolina Department of Transportation**

Responsible for the pulling together the standards for this standard box beam bridge. Michael Baker is designing a new bridge replacement on existing Cypress Church Road in Moore County, North Carolina. Michael Baker is providing roadway design, structural design, and utility design and coordination. Design efforts are to minimize cost and schedule impacts to the client.

Bridge Engineer**Bridge No. 54 Replacement, Mecklenburg County, North Carolina. North Carolina Department of Transportation**

Responsible for the design of the final design of the prestressed concrete superstructure and substructure. Michael Baker is providing engineering and environmental services for the replacement of Bridge No. 54 on NC 160 in Mecklenburg County, North Carolina. Services include project management, public involvement, community impact assessment, agency coordination, preliminary roadway design, and federal level categorical exclusion. The transportation management plan included full road closure with off-site detour for Concord Avenue with maintenance of traffic phasing to maintain local access.

Bridge Engineer**Union Pacific Railroad Grade Separation, Columbia County, Arkansas. Arkansas Department of Transportation**

Responsible for designing the substructure which consisted of 8 bents total (2 end bents, 1 expansion bent and 5 fixed bents) with varying skews and transitioning cross-slopes. Michael Baker performed design and engineering services for the Arkansas Department of Transportation to replace one structure in Columbia County, Arkansas, along Highway 82, Section 3 over the Union Pacific Railroad line. The existing railroad underpass was replaced on a new alignment with an



overpass bridge. Services included structural design, railroad coordination, traffic staging, erosion control, and stormwater pollution prevention.



Dean M. Wood

Field Technician III | Michael Baker International

BIOGRAPHY

Mr. Wood holds extensive experience in the engineering field ranging from surveying to construction inspecting to materials inspecting and auditing state and federal projects.

Mr. Wood spent the better part of his career working at North Carolina Department of Transportation (NCDOT). He holds vast knowledge of NCDOT policies and specifications as he was employed with the NCDOT for a total of 31 years. His knowledge ranges from surveying, maintenance, and Section Material Specialist (M&T). Mr. Wood has a great deal of supervisor skills working with lower level technicians, NCDOT inspectors and contractors, and producers or suppliers. He worked closely with the construction offices in Division 14 (NCDOT Construction/District Engineer's office) to ensure that issues are being taken care on each project before they are accepted and project certified by the NCDOT.

Mr. Wood has a working knowledge of Hicams/SAP which are the programs used by NCDOT to track and record their information and materials on each project. He assists with the state and federal auditing process when the projects are being closed out and project certified.

EXPERIENCE

Construction Manager
2020 Statewide On-Call Construction Engineering & Inspection Services LSC 7000020559. North Carolina Department of Transportation

Responsible for ensuring that Michael Baker employees are meeting their goals as construction inspectors within the North Carolina Department of Transportation workplace. Additionally ensures that Michael Baker employees are certified in the correct classes and training that applies to their specific job.

Proposed Labor Category

Field Technician III – Task Area 11

Proposed Task Areas

- 17. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- A.A.S., 1992, Civil Engineering Technology, Asheville-Buncombe Technical Community College

Certifications

- ACI Concrete Field Testing Technician - Grade 1, North Carolina, 2024, 00049521
- NCDOT Concrete Batch Technician, North Carolina, 2020, PCB-11062
- Troxler Nuclear Gauge Safety Training Class, North Carolina, 2002, PVT-11062



Construction Manager

Div 13 2023 OnCall_Marion. North Carolina Department of Transportation

Responsible for ensuring that Michael Baker employees are meeting their goals as construction inspectors within the North Carolina Department of Transportation workplace. Additionally ensures that Michael Baker employees are certified in the correct classes and training that applies to their specific job.

Construction Manager

Div 13 2023 OnCall_Weaverville. North Carolina Department of Transportation

Responsible for ensuring that Michael Baker employees are meeting their goals as construction inspectors within the North Carolina Department of Transportation workplace. Additionally ensures that Michael Baker employees are certified in the correct classes and training that applies to their specific job. Worked closely with the construction offices(Resident's Office in Division 14) to ensure that issues were taken care of on each project before they were accepted and project certified by the client.

Maintenance/Construction Section Materials Specialist and Materials and Testing Specialist North Carolina Department of Transportation

Worked for the North Carolina Department of Transportation for a total of thirty one years. Served as the Party Chief while acting as a maintenance section specialist. While serving as construction sections specialist, tasks included providing inspection of structures, roadways, and erosion. While working for the materials and testing unit, responsibilities included acting as a specialist for Division 14.

Maintenance and Testing Section Materials Specialist (2012-2023)

North Carolina Department of Transportation

Provided administrative and technical supervision of technicians and project certifications. Additionally provided federal and state materials auditing.

Technician (1999-2012)

North Carolina Department of Transportation Construction Unit Division 14

Responsible for acting as a technician for the construction unit providing structural and roadway inspection services.



Jeffrey L. Stafford

Field Technician III | Michael Baker International

BIOGRAPHY

Mr. Stafford has 31 years of experience with direct professional technician and inspection services. He is a technically minded professional that has significant experience in compliance documentation of construction projects in the federal arena. His current responsibilities include, but are not limited to, the following: Monthly pay applications/estimates for all related projects items; Assembling, checking, and processing final estimates and compiling related correspondence. He submits required documents to various Departments and maintains working and final record of As-Built plans for all projects.

EXPERIENCE

Construction Inspector

Kuwait JOC and MII Cost Book Update, Kuwait. USACE - Walla Walla District

Responsible for compiling data for cost estimating regarding equipment fees and rental rates. Michael Baker provided cost estimating services in support of USACE TAM to develop an updated JOC and MII Cost Book for the Kuwait construction market. This included the collection of labor, material, and equipment cost and adjusting to reflect current market conditions. Michael Baker provided an update to the Kuwait JOC and MII Cost Book in accordance with specific requirements detailed in the USACE technical scope of work to Task Order No. W91237-19-F-0081. This effort, as well as products developed under this project, supports future cost engineering efforts for the Transatlantic Middle East District, USACE Districts, and AEs throughout the CENTCOM Region.

Construction Inspector

Colonial DR&R Cost Est. Steptoe and Johnson, LLP

Responsible for compiling data from plan take-offs using PlanSwift and MII software.

Proposed Labor Category

Field Technician III – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- Vocational/Technical, 1989, Architectural Drafting, Guilford Technical Community College



Technician

NCDOT Div 4 Broadband. North Carolina Department of Transportation

Responsible for project record keeping, including using the client's proprietary software, for the installation of Broadband related facilities within the NCDOT program and public rights of way. Responsible for maintaining project records including, monthly estimates, material records, and certified payrolls.

Technician

IMCOM Real Property Master Planning Capital Investment Strategy Development (CIS), Cost Engineering Services, Huntington, West Virginia. USACE - Walla Walla District

Responsible for compiling data for cost estimating equipment fees and rental rates. Michael Baker provided senior level engineering input, oversight, analyses, and technical review of planning documents and Installation Management Command's Master Planning Capital Investment Strategy (CIS) template. Tasks included assisting with the successful resolution of complex planning and cost engineering related problems; developing the CIS; and preparing and developing cost documents and parametric cost estimates for each IMCOM installation on the overall program, which required planning and tracking of cost for monitoring the work and recommending efficiency improvements.



Ryan F. LaFrancis

Field Technician II | Michael Baker International

BIOGRAPHY

Mr. LaFrancis is an Engineering Technician that brings many years of experience to residential, commercial, and highway construction projects. He can communicate openly and effectively with all parties involved, from laborers to Engineers. Mr. LaFrancis is a dedicated inspector and is an asset to our team. He plays a key role in our CMT operations as a team lead and trainer. His duties include, but are not limited to, proof roll, conventional density, slump, air, unit weight, temperature testing, and casting of cylinders for concrete compressive strength, dynamic cone penetrometer for footing bearing soils capacity, subgrade evaluation, ABC, asphalt, and striping. He has inspected projects for commercial development as well as infrastructure projects throughout the Carolinas.

EXPERIENCE

Project Manager

Darrowby Ridge. LeoTerra Development Inc.

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.

Construction Inspection Coordinator

Biscuitville Derita Rd CMT. Colmar Contracting, Inc.

Scheduled field staff, reviewed reports, wrote proposals, monitored budget, monitored and assisted with inspections of field operations being performed by the contractor, provided recommendations for value engineering, addressed design issues, held meetings, assisted with keeping the contractor progressing with the project, dealt with property owners' complaints and helped with record keeping and additional tasks as needed. Michael Baker provided Construction Materials Testing Services for Colmar Contracting, Inc. on Biscuitville at the Shops on Derita Road in Charlotte, North Carolina. Services included material testing for soils,

Proposed Labor Category

Field Technician II – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects



DCP's, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, special inspections, and traffic control.



Alver P. Hughley III

Field Technician II | Michael Baker International

BIOGRAPHY

Mr. Hughley is a construction inspector in Michael Baker's Greensboro, North Carolina office. He has provided construction inspection services for infrastructure projects throughout the state. Mr. Hughley's inspection experience includes asphalt, concrete, and stone inspection, asphalt base compaction, electrical utilities, and traffic control. He also has experience scheduling inspectors for a countywide resurfacing program.

EXPERIENCE

Construction Inspector

Airport Development Construction Management and Oversight, Piedmont Triad International Airport (GSO), Greensboro, North Carolina. Piedmont Triad Airport Authority

Responsibilities included but not limited to inspections of asphalt paving, stone and asphalt base compaction, electrical utilities and duct bank installation. Michael Baker provided program management, airfield planning, construction management, and inspection services for development of site and support infrastructure program for the new Federal Express Mid-Atlantic Hub sort facility at the airport.

Lead Inspector

Danbury to Meadows Off-Site Sewer Improvements, Stokes County, North Carolina. Stokes County, North Carolina

Responsible for inspection over Force Main and Gravity Sewer project. Duties included inspection, report writing, and calculating estimates. Michael Baker is providing environmental and engineering services to construct four miles of sewers and force mains with pump station to connect between the Town of Danbury and the community of Meadows and a new community college facility.

Engineering Technician

Limited Services Agreement for Construction Engineering and Inspection Services, Statewide, North Carolina. North Carolina Department of Transportation

Responsible for inspection of asphalt paving, curb & gutter, and utilities. Michael Baker provided on-call construction engineering and inspection

Proposed Labor Category

Field Technician II – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 1997, Industrial Technology/Computer Aided Drafting and Design, North Carolina Agricultural and Technical State University

Certifications

- NCDOT Chemically Stabilized Subgrade/Base Essentials, North Carolina, 2013, 1551333
- NCDOT Concrete Field Testing Technician - Grade 1, North Carolina, 2008
- NCDOT Conventional Density Technician, North Carolina, 2008, 50151



services for several projects in Divisions 10 and Division 12, including resurfacing and bridge replacements over water, and grading, drainage, erosion control, milling, paving, temporary bridge, removal of a bridge, new structure construction, and traffic control. Michael Baker's services include construction inspection, materials sampling and testing, quality assurance oversight, quantities calculations, project documentation, interpretation of plans and specifications, permit compliance, and maintenance and protection of traffic.



Jerome J. Adams

Field Supervisor II | Michael Baker International

BIOGRAPHY

Mr. Adams is a highly motivated individual that strives to succeed in every task at hand. He has nearly two decades of experience in the construction industry including six years of construction based education. He has worked in the construction industry within North Carolina for over a decade performing inspections of various types of projects from Roads, Bridges, Drainage and Broadband inspections. Mr. Adams has strong communication skills and is able to work with all stakeholders within projects to ensure that all tasks are being completed on time and within compliance of the project specifications and funding entity requirements. Currently, Mr. Adams is working as a Construction Manager for Michael Baker International in the administration of municipal projects for the City of Asheville and the City of Greensboro.

EXPERIENCE

Technical Manager

Division 14 Construction Engineering and Inspection On-Call Services, North Carolina. North Carolina Department of Transportation

Responsible for technical support. Michael Baker provided on-call construction engineering and inspection services for several projects in divisions 1-14, including resurfacing and bridge replacements over water, grading, drainage, erosion control, milling, paving, temporary bridges, structure removals, traffic shifts, new structure construction, erosion, and traffic control. Michael Baker's services included construction inspection, materials sampling and testing, quality assurance oversight, quantities calculations, project documentation, interpretation of plans and specifications, permit compliance, and maintenance and protection of traffic.

PREVIOUS WORK HISTORY

Engineering Technician(April 2010 – March 2017)

Vaughn & Melton Consulting Engineers, Asheville, North Carolina

Conduct independent complex inspections of roadway and bridge

Proposed Labor Category

Field Supervisor II – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Education

- B.S., 2008, Construction Management, Western Carolina University
- Coursework, 2005, Civil Engineering, North Carolina State University

Certifications

- NCDOT ABC Sampling Technician
- NCDOT Borrow Pit Sampling Technician
- ACI Concrete Field Testing Technician - Grade 1, North Carolina, 7768
- NCDOT Conventional Density Technician
- Introduction to Asphalt Pavements
- NCDOT QMS Roadway Technician
- Certified Professional in Erosion and Sediment Control
- Humboldt Radiation Safety Officer, North Carolina, 2018, 10238

Professional Affiliations

- Construction Management Association of America (CMAA)



construction processes and materials to assure compliance with contract plans, standards, and specifications. Experienced in performing a wide variety of standardized and non-standardized tests and assignments in compiling, analyzing, computing, editing and processing data. Maintain project records, daily diaries, materials received, pay record documentation, and NPDES documentation. View situations that arise and propose solutions to improve working conditions. Complete a variety of complex calculations and check drawings, calculations, and plans. Train and instruct other inspectors and review their work for accuracy and completeness. Effectively and openly communicate with all project personnel to achieve a quality finished product and utilize specifications and standards to achieve early completion.

Survey Technician (August 2009 – April 2010)

Bureau of Indian Affairs, Cherokee, North Carolina

Land Surveys to determine property boundaries within the Cherokee Indian Tribal Land. Utilized geographic data and various GIS software to build maps. Prepare legal descriptions. Road and water right-of-way easement surveys. Communicated with the public and tribal officials for clarity and transparency.

Site Superintendent (November 2008 – April 2009)

Appalachian Environmental Services, Sylva, North Carolina

Supervised and coordinated daily work on multiple stream and wetland restoration projects within North Carolina. Responsible for scheduling subcontractor, consultants, and vendors in critical path to ensure timely completion. Communicate with all entities (engineers, city officials and subcontractors, consultants, and vendors) to ensure clarity and transparency. Read and interpret plans, specs, and assess situations that arise on the project.

Assistant (May 2006 – August 2007)

Wright Brothers Construction Inc., Charleston, Tennessee

Assisted the supervisor in the coordination of daily activities; scheduling, inspections, quality control and job safety. Completed employee performance evaluations and probationary reports to document and/or correct employee behavior to ensure employee is working at acceptable standards. Assisted in preparing preliminary work schedules for the crew supervised; coordinate schedules with management; on a daily basis, assign work and determine job priorities for the assigned crew. Supervised the installation, repair and maintenance of traffic safety and control devices. Arranged for materials and equipment needed to proceed with projects.

Assistant (Summers May 2001 – August 2008)

North Carolina Department of Transportation, Raleigh, NC & Andrews, North Carolina

Assisted the resident engineer in supervising the planning, coordination and implementation of construction jobs. Assisted NCDOT inspectors conducting independent complex inspections of roadway and bridge construction processes and materials to assure compliance with contract plans, standards, and specifications. Assisted the NCDOT survey party with operating and maintain various surveying instruments to measure and verify elevations, angles and distances. Also assisted in the mathematical calculations to establish and locate reference points, vertical and horizontal reference points and line staking for projects.



Christopher K. Bolen

Field Supervisor II | Michael Baker International

BIOGRAPHY

Mr. Bolen has extensive expertise in construction materials testing, special inspections, construction engineering and inspections, project management, marketing, business development, employee training, scheduling, and budgeting. Mr. Bolen has extensive expertise in construction materials testing, special inspections, construction engineering and inspections, project management, employee training, scheduling, and budgeting. Mr. Bolen's responsibilities encompass project management, equipment maintenance and calibrations, reviewing daily reports, and providing project closeout packages.

EXPERIENCE

Project Manager

Brookberry Farm - 042622. Brookberry Farm, LLC

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.

Assistant Project Manager

Joseph's Creek Subdivision On-Call Material Testing, Greensboro, North Carolina. Lomonaco Investments

Assisted in proposal writing, marketing client, overseeing project and progress, scheduled our services, provided value engineering recommendations, and reviewed reports. Michael Baker provided construction materials testing services for the Joseph's Creek Subdivision project in Greensboro, North Carolina. Services included material testing for soils, dynamic cone penetration, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, and traffic control.

Proposed Labor Category

Field Supervisor II – Task Area 11

Proposed Task Areas

11. Technical and Engineering Support for Infrastructure and Housing Projects

Certifications

- ICC Soils Special Inspector, North Carolina, 2020
- ICC Structural Masonry Special Inspector, 2020
- Troxler Nuclear Gauge Safety Training Class, North Carolina, 2001
- NICET II Construction Materials Testing-Asphalt, North Carolina, 2010
- NICET II Construction Materials Testing-Concrete, North Carolina, 2010
- NICET II Construction Materials Testing-Soils, North Carolina, 2010



Project Manager

Construction Materials Testing. Byron Development, LLC

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.

Assistant Project Manager

Construction Materials Testing On-Call, Greensboro, North Carolina. D Stone Builders, Inc.

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed. Michael Baker provided construction materials testing services on projects in the Piedmont Triad area surrounding Greensboro, North Carolina. Services included material testing for soils, dynamic cone penetrometers, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, special inspections, and traffic control.

Construction Inspector

Swann Street Storm Drainage, Roadway, and Structure Improvements CM/CE&I, Raleigh, North Carolina. City of Raleigh

Monitored and inspected field operations being performed by the contractor. Provided recommendations for value engineering, addressed design issues, held meetings, dealt with property owners' complaints and helped with record keeping and additional tasks as needed. Michael Baker performed construction management and construction engineering and inspection services for storm drainage improvements along Swann Street in the Crabtree community of Raleigh, North Carolina. Tasks included construction management, construction inspection, quality assurance oversight, surveying verification, quantities calculations, project documentation, interpretation of plans and specifications, permit and erosion control compliance, and maintenance and protection of traffic.

Project Manager

Darrowby Ridge. LeoTerra Development Inc.

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.

Construction Inspection Coordinator

Blu Ladder Cons CMT, Roanoke, Virginia. Blu Ladder Construction, Inc.

Michael Baker provided construction materials testing services on an 8-building apartment complex with rehabilitation in the Roanoke, Virginia area. Services included material testing for soils, dynamic cone penetrometers, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, rebar layout inspections, erosion and sediment control inspections, special inspections, and traffic control.

**Project Manager****Pleasant Ridge Subdivision. LeoTerra Development Inc.**

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.

Assistant Project Manager**Wendover Avenue Sidewalk Improvements, Greensboro, North Carolina. City of Greensboro**

Monitored and assisted with inspections of field operations being performed by the contractor. Provided recommendations for value engineering, addressed design issues, held meetings, assisted with keeping the contractor progressing with the project, dealt with property owners' complaints and helped with record keeping and additional tasks as needed. Michael Baker provided construction engineering and inspection services for the construction of approximately five miles of new concrete sidewalk on both sides of Wendover Avenue. Michael Baker's services included construction management, construction inspection, materials sampling and testing, quality assurance oversight, quantities calculations, project documentation, interpretation of plans and specifications, permit and erosion control compliance, and maintenance and protection of traffic.

Construction Inspection Coordinator**Biscuitville Derita Rd CMT. Colmar Contracting, Inc.**

Scheduled field staff, reviewed reports, wrote proposal, monitored budget, monitored and assisted with inspections of field operations being performed by the contractor, provided recommendations for value engineering, addressed design issues, held meetings, assisted with keeping the contractor progressing with the project, dealt with property owners' complaints and helped with record keeping and additional tasks as needed. Michael Baker provided Construction Materials Testing Services for Colmar Contracting, Inc. on the Biscuitville at the Shops on Derita Road in Charlotte, North Carolina. Services included material testing for soils, DCP's, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, special inspections, and traffic control.

Elim Townhomes Construction Materials Testing Services, Greensboro, North Carolina. D Stone Builders, Inc.

Michael Baker provided construction materials testing services for the Elim Townhomes project in Greensboro, North Carolina. Services included material testing for soils, dynamic cone penetration testing, concrete sampling, asphalt paving, subgrade installations, proof rolling observations, special inspections, and traffic control.

Assistant Project Manager**Hickory Ridge - 051122. Hickory Ridge Estates, LLC**

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.



Assistant Project Manager

Carol Chavis Memorial YMCA. The YMCA of High Point

Responsibilities included scheduling field staff, reviewing reports, writing proposals, monitoring the budget, monitoring and assisting with inspections of field operations performed by the contractor, providing recommendations for value engineering, addressing design issues, holding meetings, monitoring the contractor's progress on the project, addressing property owners' complaints, and helping with record keeping and additional tasks as needed.



~ Examples of Prior Work (Attachment H)

Example 1 (CohnReznick and Metric Consulting)	
Client Name:	Louisiana Office of Community Development
Program:	✓ Road Home Closeout (CDBG-DR) ✓ Restore 2016 Homeowner Program (CDBG-DR) ✓ Emergency Rental Assistance Program (U.S. Treasury) ✓ Homeowner Assistance Fund Program (U.S. Treasury) ✓ Restore 2020 Homeowner Assistance Program (CDBG-DR) ✓ Restore 2020 Small Business Program (CDBG-DR) ✓ Restore 2024 Homeowner Assistance Program (CDBG-DR) Total of \$19B in federal funding supported across programs.
Brief Description of Services Rendered:	Since 2008, the State of Louisiana has entrusted CohnReznick to deliver critical disaster recovery support across the state. Over the years, the state has mobilized CohnReznick to help manage and oversee more than \$19 billion in federal funding, all without audit issues or public scrutiny. As part of this effort, CohnReznick provides Quality Assurance and Quality Control (QA/QC) Services for federally funded programs administered by the Office of Community Development, Disaster Recovery Unit. CohnReznick primarily supports programs funded through allocations from the U.S. Department of Housing and Urban Development's Community Development Block Grant Disaster Recovery Program and is designed to support Louisiana's long-term recovery from federally declared disasters. We've supported every facet of program delivery, including policy development, compliance monitoring, IT system QA, and contractor oversight. Our work spans 46 process areas, with reviews conducted daily, weekly, and monthly based on risk level. We've also led fraud prevention, duplication of benefits compliance, and invoice reviews that improved operational efficiency. Critically, CohnReznick has provided surge support, rapidly scaling resources to meet urgent program demands, reduce backlogs, and accelerate delivery timelines. At peak, our team averaged 228 QAQC file reviews per day, reducing full-cycle review time to one business day. This unmatched agility, accountability, and expertise have made CohnReznick a cornerstone of Louisiana's disaster recovery success. Task Areas in scope of this RFP that CohnReznick has provided include: • Development of Policies, Procedures, and Standard Operating Procedures (SOPs) • Financial Compliance, Oversight, and Fraud Prevention • Duplication of Benefits (DOB) Compliance



	• Procurement Compliance and Monitoring • Claims, Appeals, and Case Reviews • Needs Assessments, Market Analysis, and Geospatial Support • Program Performance Monitoring and Evaluation • Audit Readiness and Monitoring Support • Technical and Engineering Support for Infrastructure and Housing Projects • Training, Technical Assistance, and Capacity Building • Communication, Public Information, and Outreach Support • Grant Management • Technical Systems Specification & Project Management • Environmental Review
Example 2 (CohnReznick)	
Client Name:	Texas General Land Office
Program:	✓ Homeowner Assistance Program (CDBG-DR) ✓ Single Family Development Program (CDBG-DR) ✓ Multi-family Rental Program (CDBG-DR) ✓ Small Rental Program (CDBG-DR) ✓ Homebuyer Assistance Program (CDBG-DR) ✓ Buyout Program (CDBG-DR) ✓ Public Services (CDBG-DR) ✓ Economic Revitalization Program (CDBG-DR) ✓ Planning Program (CDBG-DR) ✓ Homeowner Assistance Program (CDBG-DR) ✓ Residential Buyout Program (CDBG-DR) ✓ SF Affordable Housing Preservation Program (CDBG-DR) ✓ Reimbursement Program (CDBG-DR) ✓ Affordable Rental Program (CDBG-DR) ✓ SF New Construction (CDBG-DR) ✓ Commercial Buyout Program (CDBG-DR) ✓ MOD Infrastructure Program (CDBG-DR)



	✓ Competitive Infrastructure Program (CDBG-DR) ✓ Planning Program (CDBG-DR) Total of \$5B in federal funding supported across programs.
Brief Description of Services Rendered:	Following Hurricane Harvey, CohnReznick played a pivotal role in supporting the State of Texas in its Disaster Recovery Program, which was a crucial element of the state's long-term recovery efforts. The recovery initiative consisted of approximately \$5.6 billion in HUD CDBG-DR funds, with \$2.3 billion allocated specifically for Houston and Harris County through the Texas General Land Office (GLO). Our major accomplishments and services between the performance period of April 2019 – November 2023 include: • Program Development and Implementation: Led the development, implementation, and closeout of key programs such as Public Services, Single Family New Construction, Multifamily Program, and Economic Development Program, ensuring alignment with 2 CFR 200 requirements and GLO Action Plan priorities. • Subrecipient Coordination: Conducted weekly meetings with subrecipients to track project progress, offer technical assistance, and address barriers, facilitating successful project completion. • Application and Contract Management: Created NOFOs for subaward selection, reviewed applications and contracts for eligibility, and provided formal recommendations for approval or denial, ensuring alignment with Action Plan priorities. • Financial Monitoring and Reporting: Developed and maintained HUD-required reports, used data analytics to forecast potential project issues, and implemented Corrective Action plans as necessary. • Program Materials and Cost-Benefit Analysis: Developed all program materials, including formal notifications, SOPs, and checklists, and conducted cost-benefit analyses for requests on time extensions or additional funding. • Continuity and Training: Provided continuity amidst staff turnover within GLO by offering comprehensive training and technical assistance, ensuring stakeholders were well-versed in program procedures and deadlines. CohnReznick's oversight extended to detailed project reviews for CDBG-DR eligibility, ensuring funds addressed unmet needs and were used as a last resort. Our team reviewed 100 multifamily development applications totaling \$525 million, delivering comprehensive underwriting reports. These efforts enabled the Texas GLO to efficiently manage CDBG-DR funds, supporting long-term recovery and the rebuilding of resilient communities. Task Areas in scope of this RFP that CohnReznick has provided include: • Development of Policies, Procedures, and Standard Operating Procedures (SOPs) • Financial Compliance, Oversight, and Fraud Prevention • Duplication of Benefits (DOB) Compliance



	• Procurement Compliance and Monitoring • Claims, Appeals, and Case Reviews • Needs Assessments, Market Analysis, and Geospatial Support • Program Performance Monitoring and Evaluation • Audit Readiness and Monitoring Support • Technical and Engineering Support for Infrastructure and Housing Projects • Training, Technical Assistance, and Capacity Building • Grant Management • Technical Systems Specification & Project Management
Example 3	
Client Name:	Florida Department of Commerce
Program:	✓ Hurricane Michael CDBG-DR Programs and CDBG-MIT Programs
Brief Description of Services Rendered:	In 2021, CohnReznick was selected by the Florida Department of Commerce (formerly FL DEO) to provide programmatic and fiscal monitoring for both the CDBG-DR program for Hurricane Michael and the Community Development Block Grant – Mitigation (CDBG-MIT) program. Scope of Services • Monitoring & Compliance Oversight: CohnReznick conducted quality assurance/quality control, risk-based monitoring, and site inspections to ensure program integrity and compliance with federal and state regulations • Policy & Procedure Development: The team assisted in developing and reviewing policies and procedures, identifying gaps in internal controls, and recommending corrective actions to mitigate risks • Subrecipient Support: CohnReznick provided technical assistance, training, and real-time guidance to subrecipients across both programs, helping them navigate HUD requirements and improve performance . • Program Impact: • Oversight of \$735 million in CDBG-DR funding for Hurricane Michael recovery • Monitoring of \$633 million in CDBG-MIT funding for mitigation projects statewide



	- Delivered insights into \$91 million in CDBG-MIT projects in 2024 alone - Supported programs including housing repair, infrastructure, voluntary buyouts, and hazard mitigation - Developed standardized monitoring tools, training materials, and reporting dashboards to streamline oversight and ensure consistency - Produced subrecipient policy updates and job aids to reinforce grant management processes Task Areas in scope of this RFP that CohnReznick has provided include: - Development of Policies, Procedures, and Standard Operating Procedures (SOPs) - Financial Compliance, Oversight, and Fraud Prevention - Duplication of Benefits (DOB) Compliance - Procurement Compliance and Monitoring - Claims, Appeals, and Case Reviews - Needs Assessments, Market Analysis, and Geospatial Support - Program Performance Monitoring and Evaluation - Audit Readiness and Monitoring Support - Technical and Engineering Support for Infrastructure and Housing Projects - Training, Technical Assistance, and Capacity Building - Grant Management - Technical Systems Specification & Project Management
Example 4 (CohnReznick and Michael Baker International)	
Client Name:	City of Atlanta Department of Grants and Community Development
Program:	HUD programs under the City of Atlanta’s Department of Grants and Community Development include the following: ✓ CDBG funds various services and community development needs like neighborhood stabilization, public infrastructure, and economic development. ✓ HOME funds affordable housing for low-income households. ✓ ESG supports homeless assistance and prevention. ✓ HOPWA funds housing and supportive services for low-income individuals living with HIV/AIDS.
Brief Description of Services	CohnReznick has served as a trusted partner to the City of Atlanta’s Department of Grants and Community Development (DGCD) since 2022, delivering comprehensive support across HUD-



Rendered:	funded programs and disaster recovery initiatives. Our team has provided project management, compliance oversight, and technical assistance for over \$40 million in annual federal entitlement grants, including CDBG, HOME, ESG, and HOPWA. We have supported the City through multiple funding rounds and competitive procurements, offering services such as environmental reviews under 24 CFR Part 58, peer reviews for Atlanta Housing Authority projects, and the development of policies and procedures for new grant programs like Healthy Homes: Atlanta. Our team has also led tailored training initiatives to strengthen internal capacity in areas such as Davis-Bacon, Section 3, and procurement compliance. In response to urgent program needs, we have mobilized rapidly and embedded staff within City departments to provide day-to-day support, facilitate stakeholder coordination, and ensure compliance with federal regulations. Our work has been recognized by City leadership for its quality, responsiveness, and impact. Key Services for the City of Atlanta: • Environmental reviews and peer assessments under HUD 24 CFR Part 58 • Development and revision of SOPs, including Uniform Relocation Assistance (URA) • Procurement compliance monitoring and technical assistance • Training and capacity building for City staff and subrecipients • Strategic advisory services to align funding with City priorities • Stakeholder engagement and public outreach for program transparency Task Areas in scope of this RFP that CohnReznick has provided include: • Development of Policies, Procedures, and Standard Operating Procedures (SOPs) • Financial Compliance, Oversight, and Fraud Prevention • Duplication of Benefits (DOB) Compliance • Procurement Compliance and Monitoring • Claims, Appeals, and Case Reviews • Needs Assessments, Market Analysis, and Geospatial Support • Program Performance Monitoring and Evaluation • Audit Readiness and Monitoring Support • Training, Technical Assistance, and Capacity Building • Communication, Public Information, and Outreach Support • Grant Management • Technical Systems Specification & Project Management • Environmental Review
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Example 5 (CohnReznick)	
Client Name:	North Carolina Emergency Management (NCEM)
Program:	✓ Public Assistance and Individual Assistance programs across 13 federally declared disasters
Brief Description of Services Rendered:	Since July 2020, CohnReznick serves as the prime contractor to the North Carolina Department of Public Safety, Division of Emergency Management, providing full-spectrum support for Public Assistance and Individual Assistance programs across 13 federally declared disasters totaling over \$4 billion in program costs. Our team delivers grant coordination, technical assistance, and compliance oversight, including reimbursement processing, project closeout, and reporting. We've developed and implemented SOPs, dashboards, and EM Grants workflows to streamline operations and ensure alignment with federal requirements. In response to Tropical Storm Helene (DR-4827-NC), CohnReznick deployed a 12-member team within 14 days to support over 130 applicants across the most heavily impacted counties. Our staff are embedded in the field, attending scoping meetings, site inspections, and serving as day-to-day points of contact for local governments, nonprofits, and tribal entities. Key Services for NCEM: • Technical assistance and training for subrecipients • Development of policies, procedures, and job aids • EM Grants customization and reporting • Support for VAYGo and RAND reviews • Coordination with FEMA and state stakeholders • Oversight of \$780M+ in COVID-19 projects for 200+ subrecipients Task Areas in scope of this RFP that CohnReznick has provided include: • Development of Policies, Procedures, and Standard Operating Procedures (SOPs) • Financial Compliance, Oversight, and Fraud Prevention • Duplication of Benefits (DOB) Compliance • Procurement Compliance and Monitoring • Claims, Appeals, and Case Reviews • Needs Assessments, Market Analysis, and Geospatial Support • Program Performance Monitoring and Evaluation • Audit Readiness and Monitoring Support



	• Training, Technical Assistance, and Capacity Building • Communication, Public Information, and Outreach Support • Grant Management • Technical Systems Specification & Project Management
Example 6 (Michael Baker International)	
Client Name:	South Carolina Office of Resilience
Program:	✓ CDBG-DR Hurricane Helene Housing Program for Oconee, Anderson, Abbeville, Pickens, and Laurens Counties
Brief Description of Services Rendered:	Michael Baker International is preparing five tiered Environmental Assessments (EA) for the South Carolina Office of Resilience's (SCOR or Responsible Entity) for SCOR's Hurricane Helene Housing Program. The tiered EAs are being in accordance with the U.S. Department of Housing and Urban Development's (HUD) regulations for the implementation of the National Environmental Policy Act (NEPA) per Title 24, Part 58 of the Code of Federal Regulations (24 CFR 58). Each EA focuses on SCOR's Hurricane Helene Housing Program activities in a single county. The five counties that Michael Baker is preparing tiered EAs for include Oconee, Anderson, Abbeville, Pickens, and Laurens Counties. The Program is funded, in part, by HUD through Community Development Block Grant Disaster Recovery (CDBG-DR) funds, and is therefore, subject to NEPA compliance per 24 CFR 58. The Program proposes to fund rehabilitation, replacement, reconstruction, structure elevation, relocation, demolition, and buyout activities in response to damage caused by Hurricane Helene within the following counties: • Area 1 (D30-P001-PG): Oconee, Anderson, Abbeville Counties • Area 2 (D30-P002-PG): Pickens County • Area 3 (D30-P003-PG): Laurens County Our scope of work for SCOR includes Preparation of a Tier I Broad Level Reviews (environmental assessment level of review) for each of the five county programs, including conducting all necessary consultations with regulatory agencies/interested parties; developing, publishing, and/or distributing all applicable public notices in accordance with HUD requirements; and preparation of Tier II templates, based on the Tier I Broad Level Review of the program for each county. Task Areas in scope of this RFP that Michael Baker International has provided include: • Technical and Engineering Support for Infrastructure and Housing Projects • Environmental Review

04

Financial Documentation

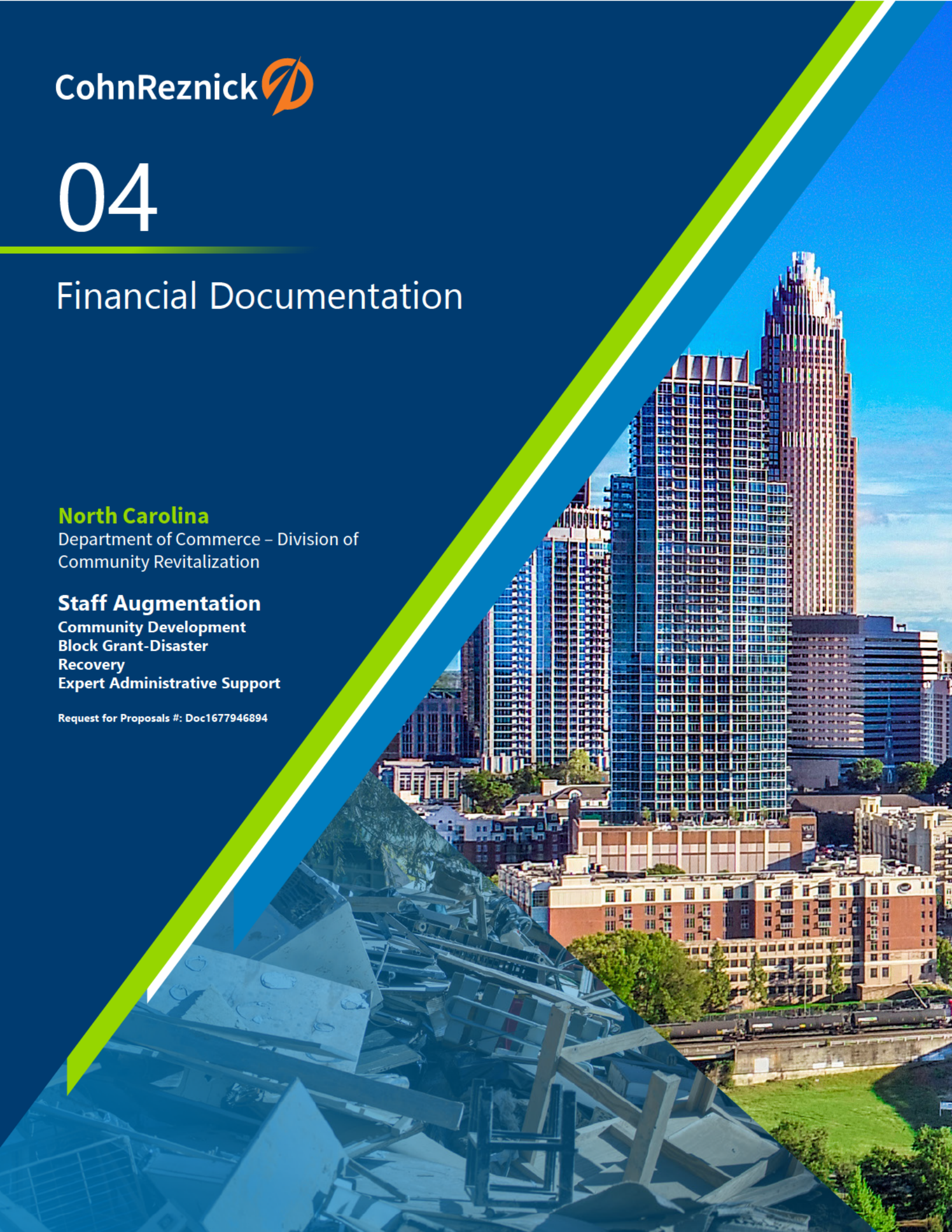
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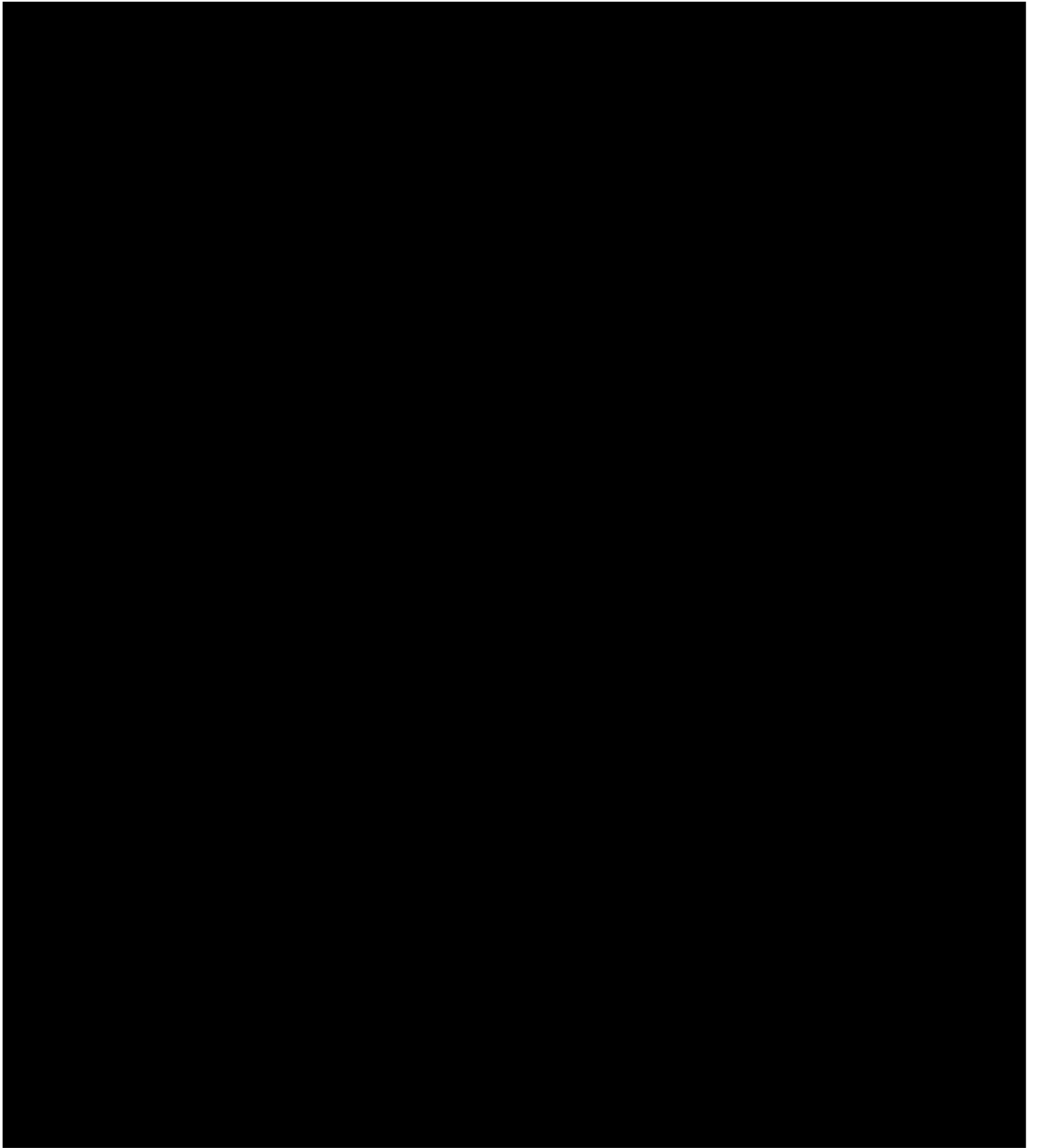
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Community Revitalization

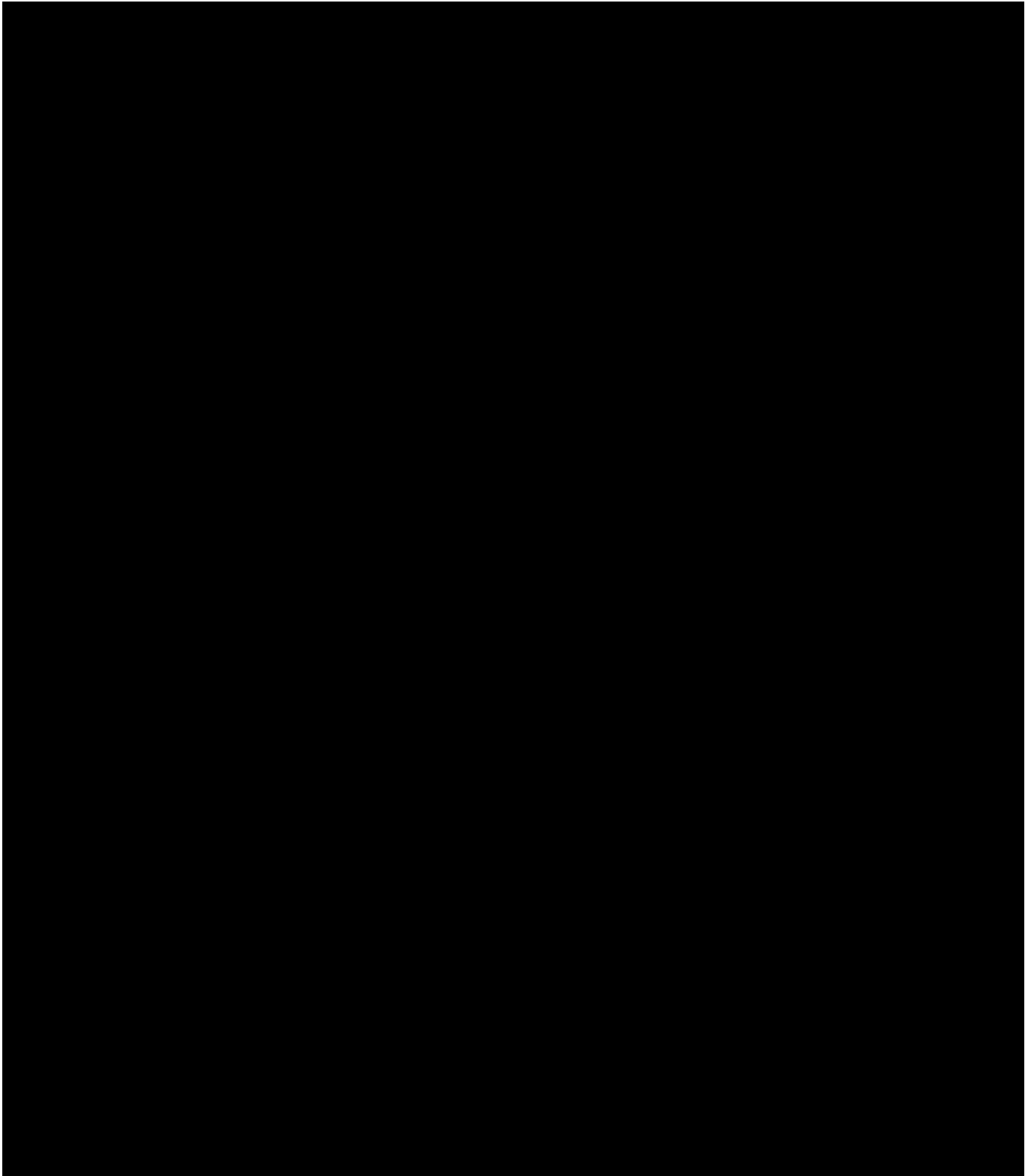
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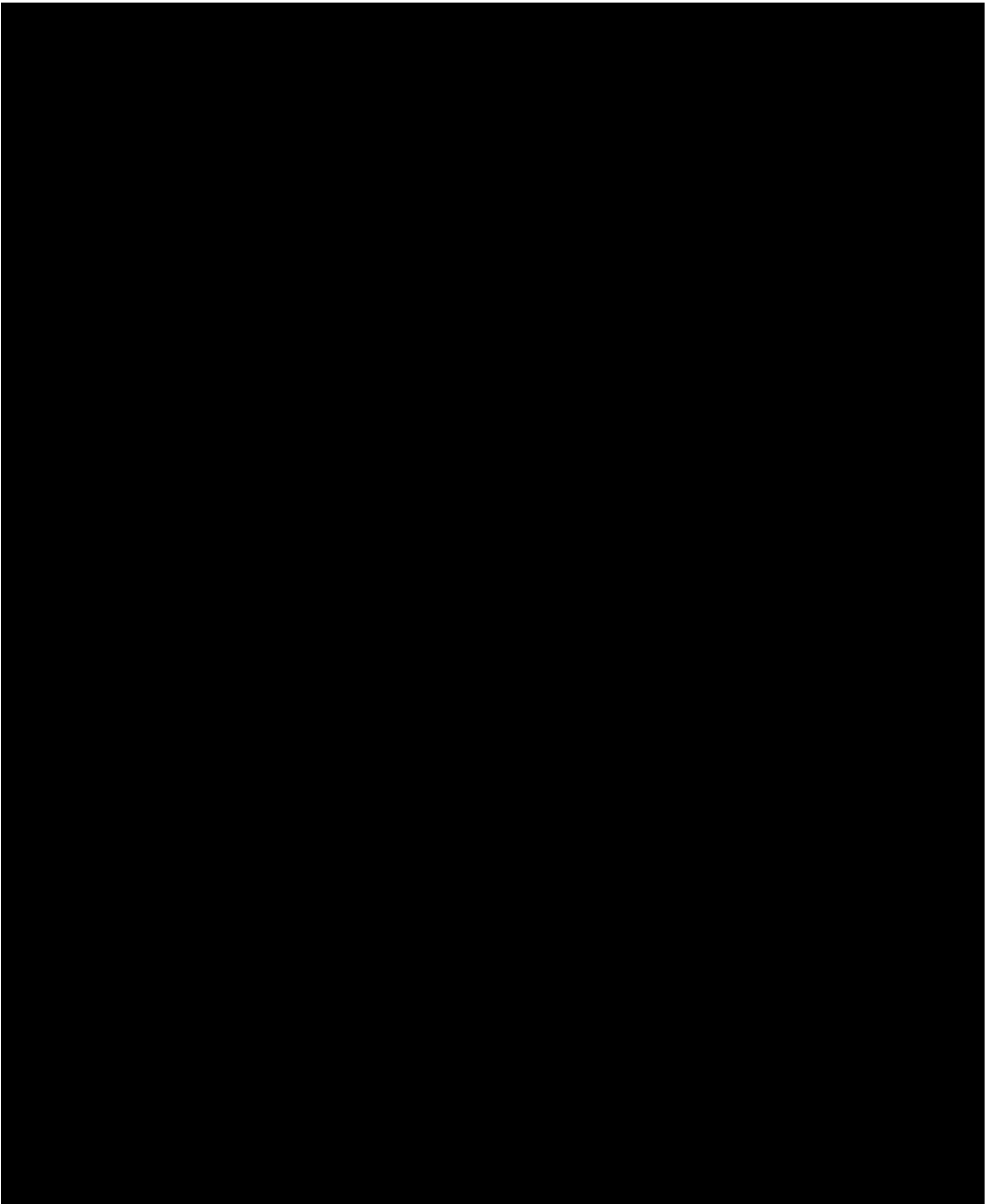
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Expert Administrative Support

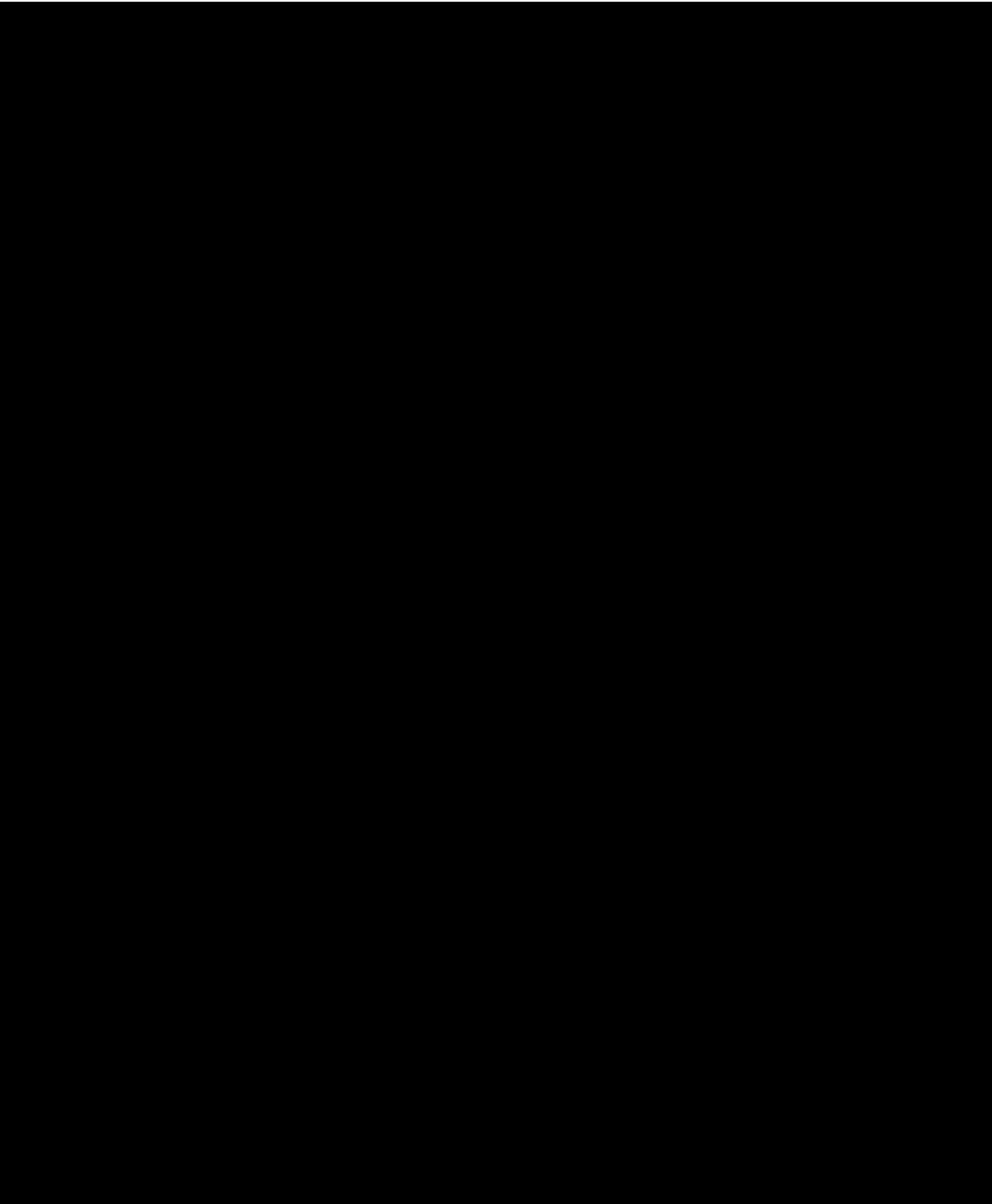
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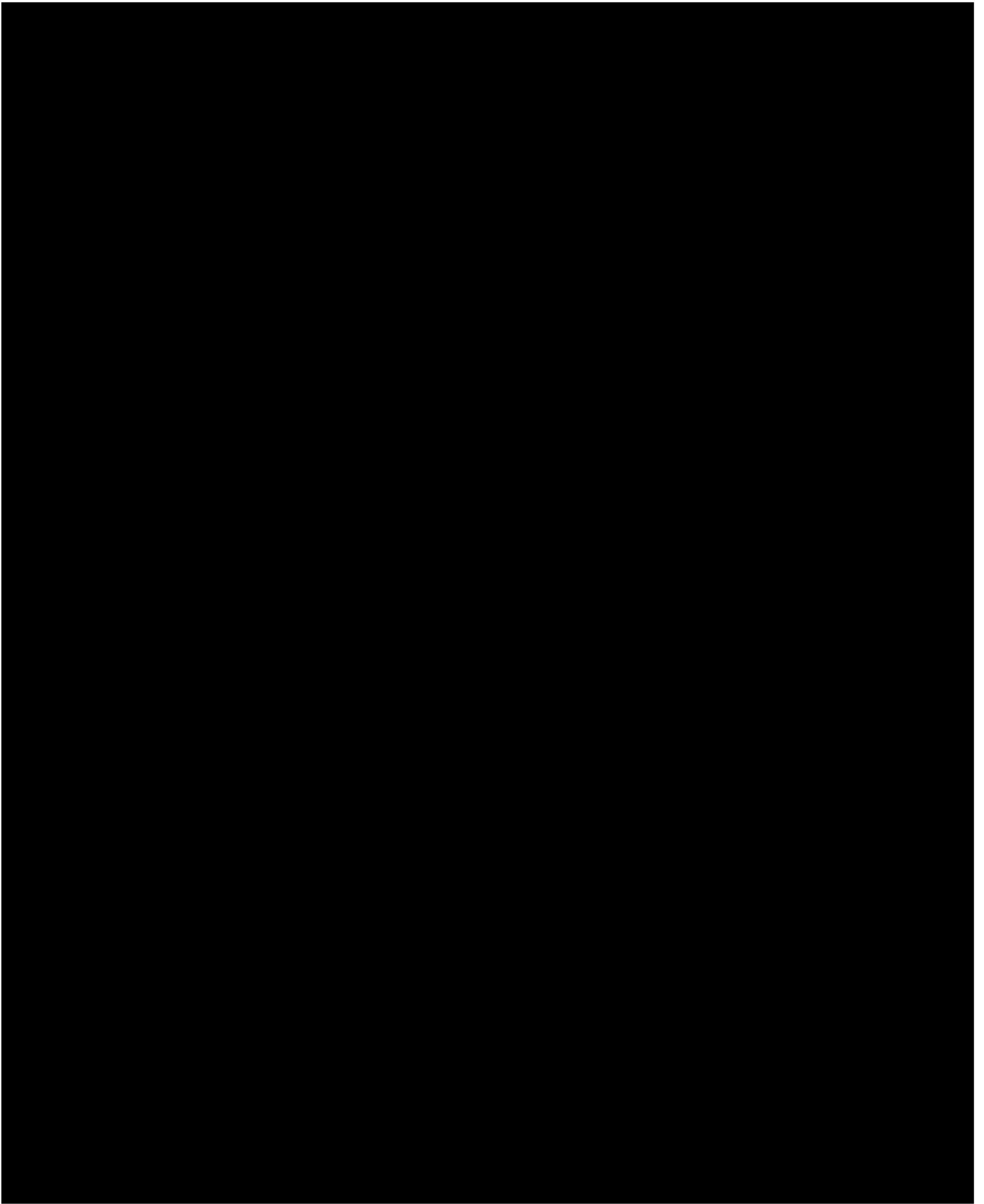


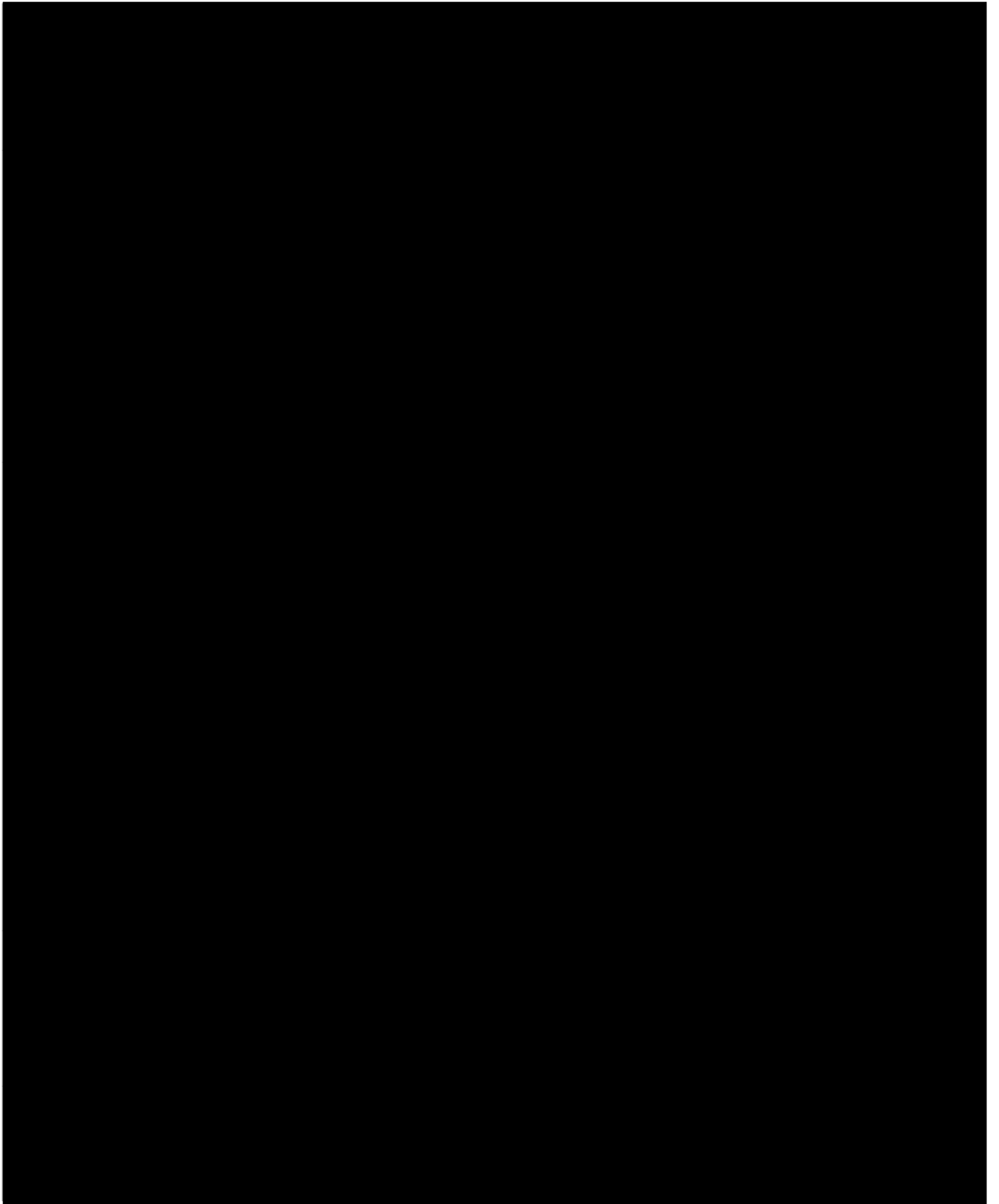


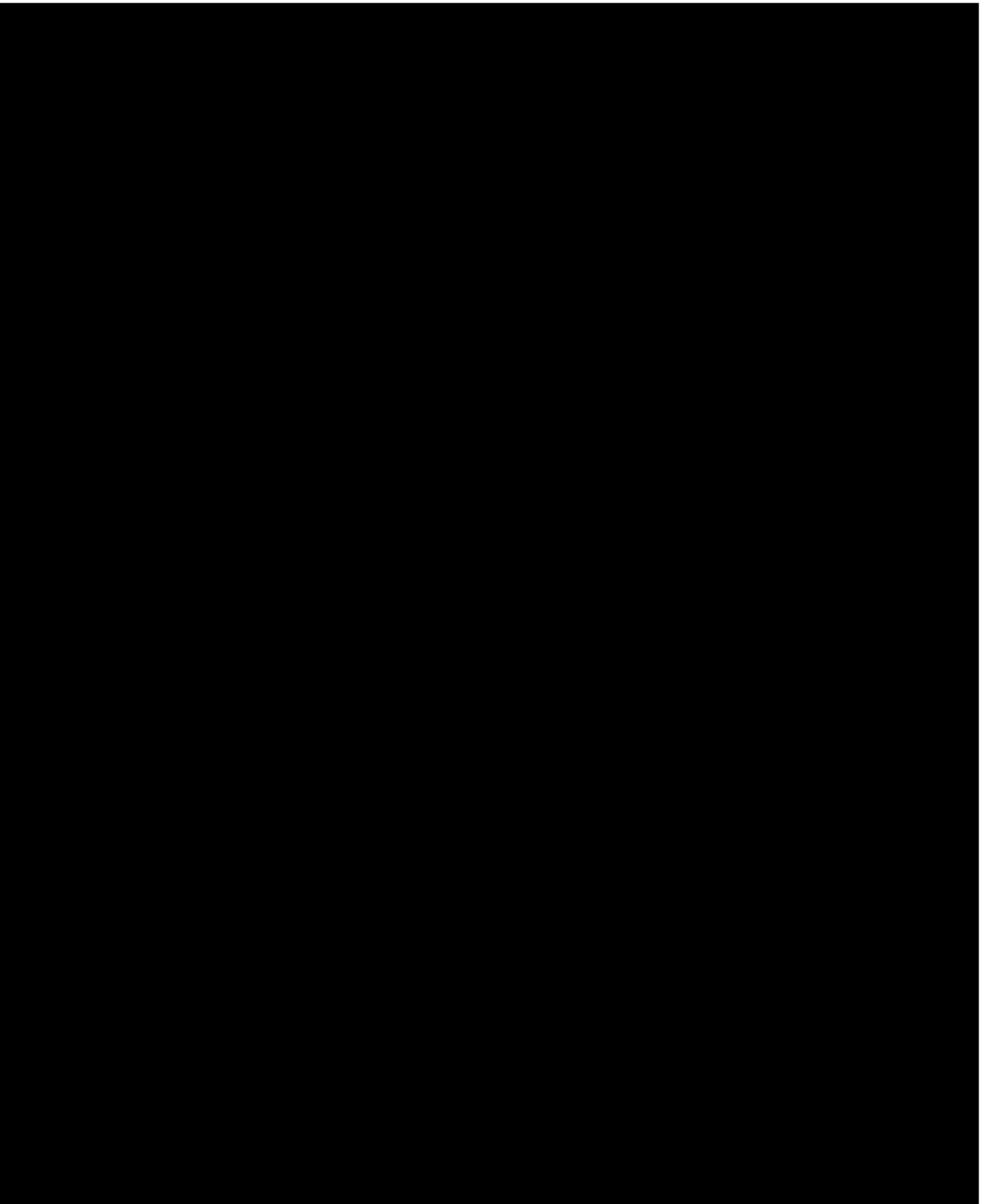


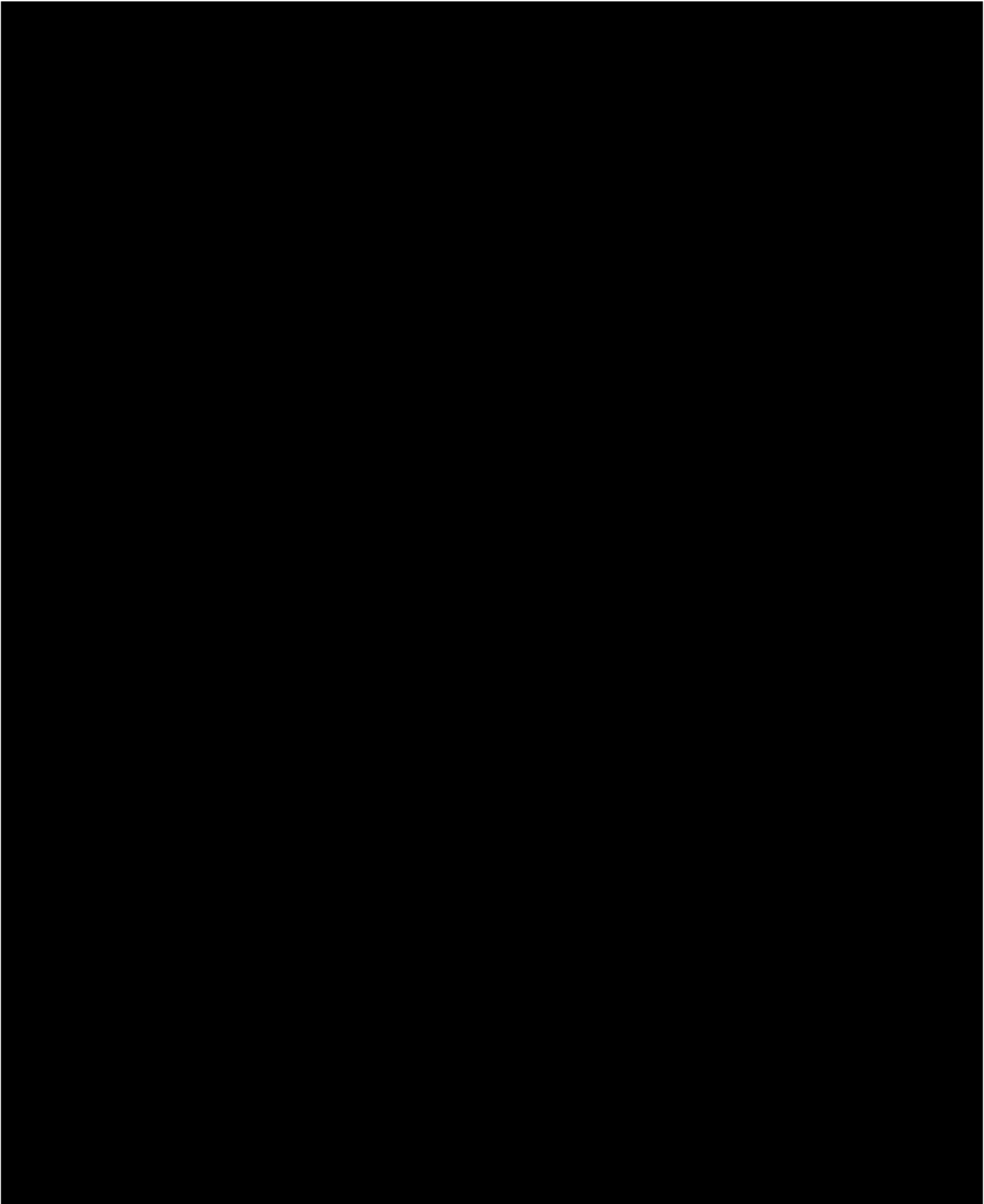


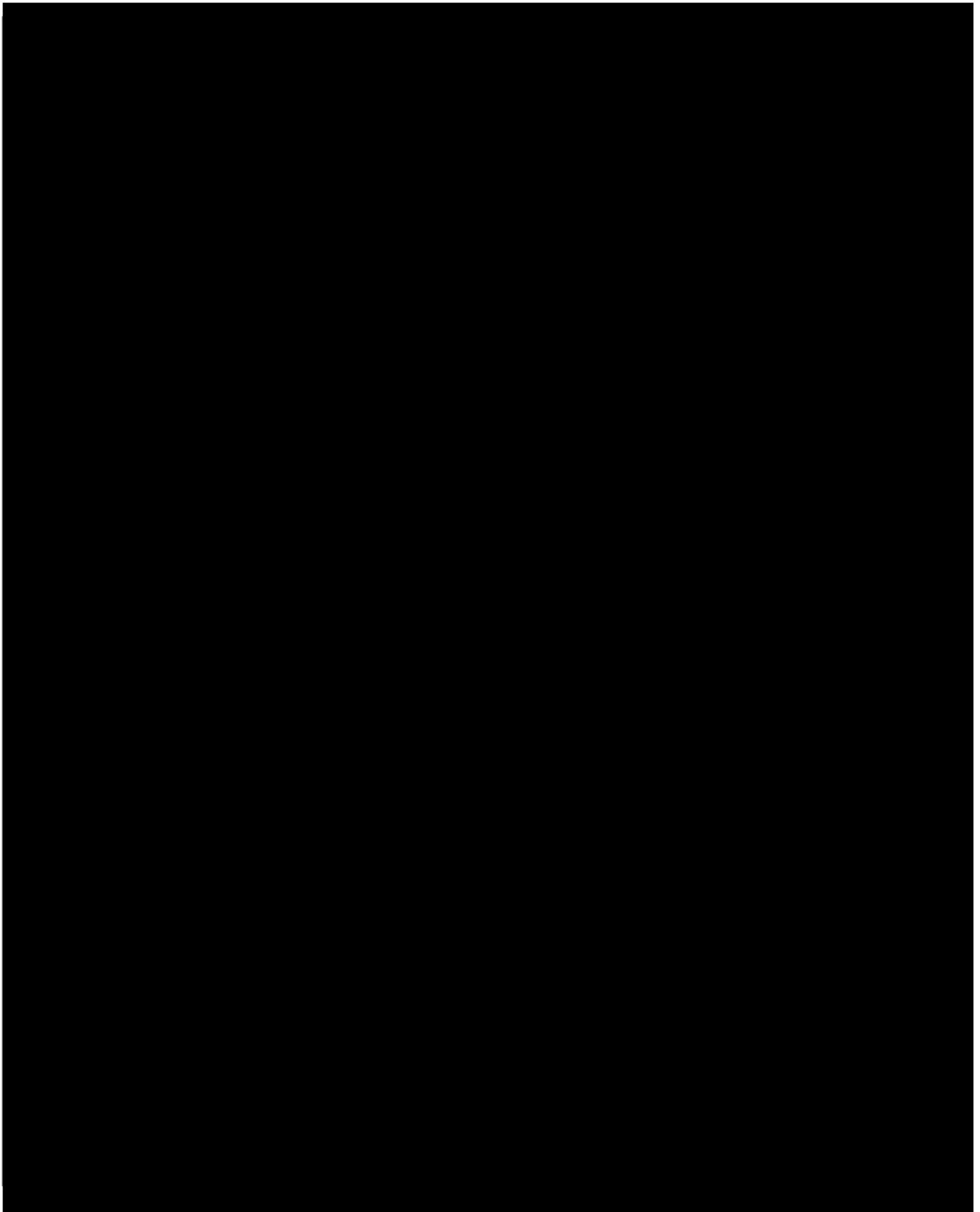


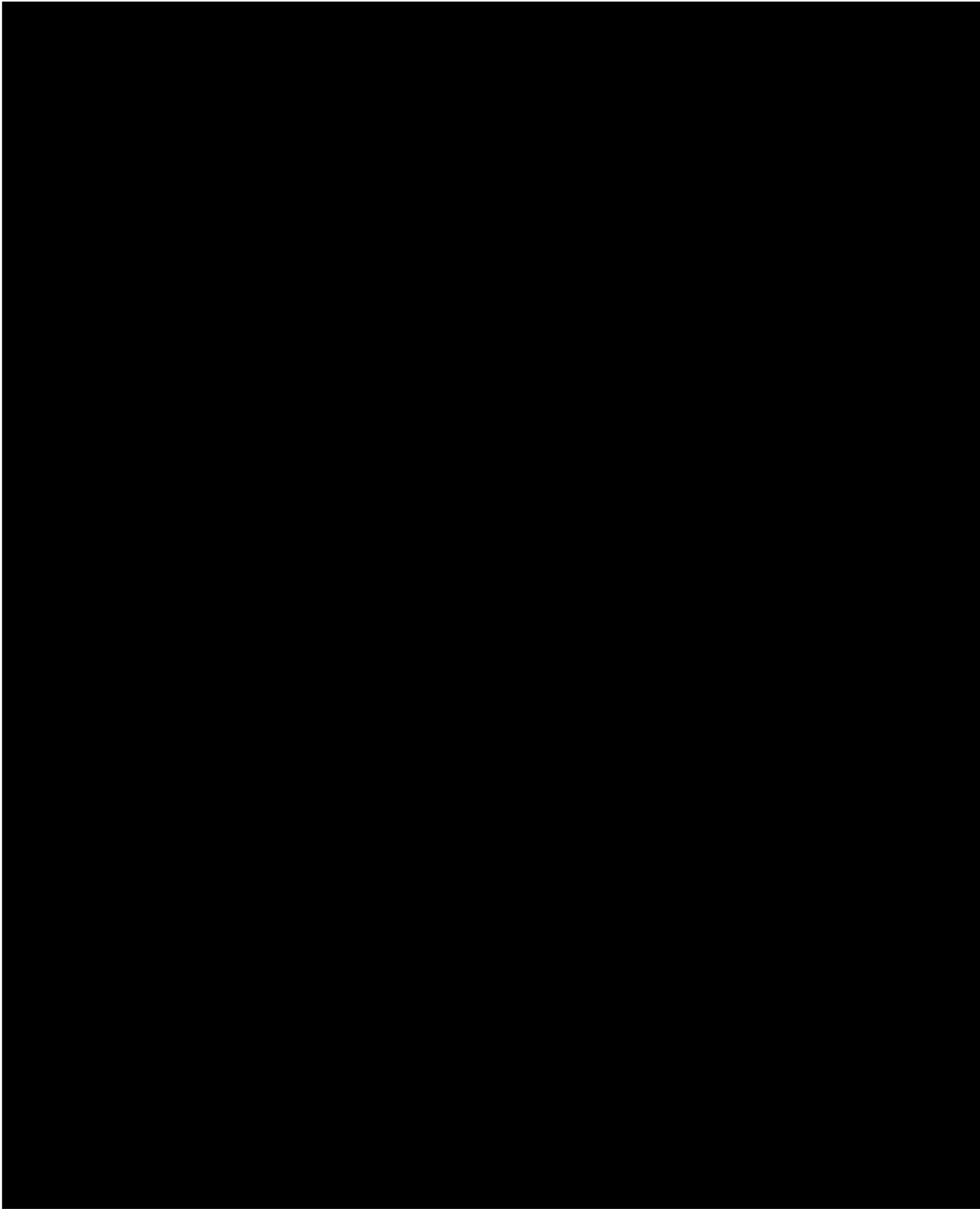


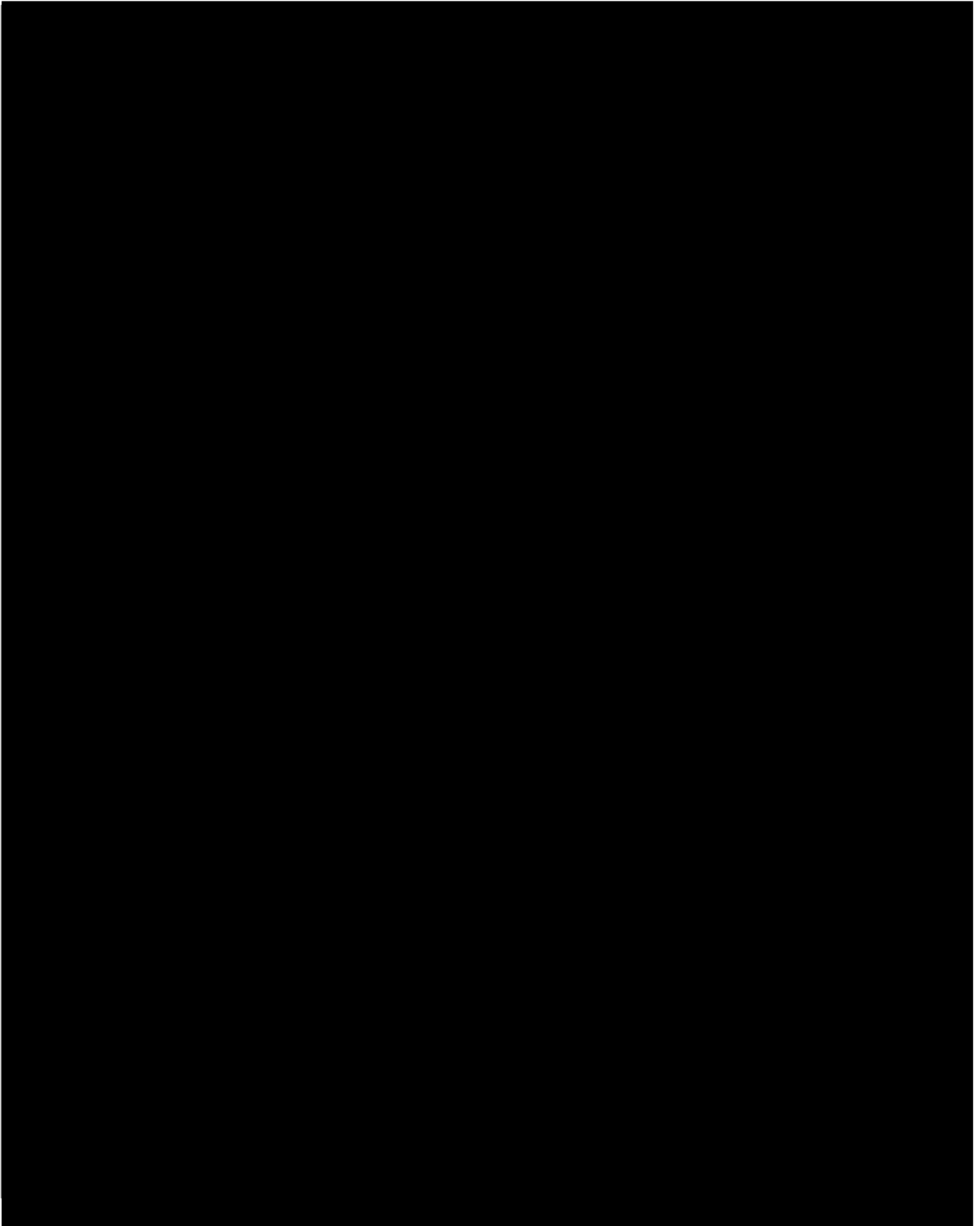


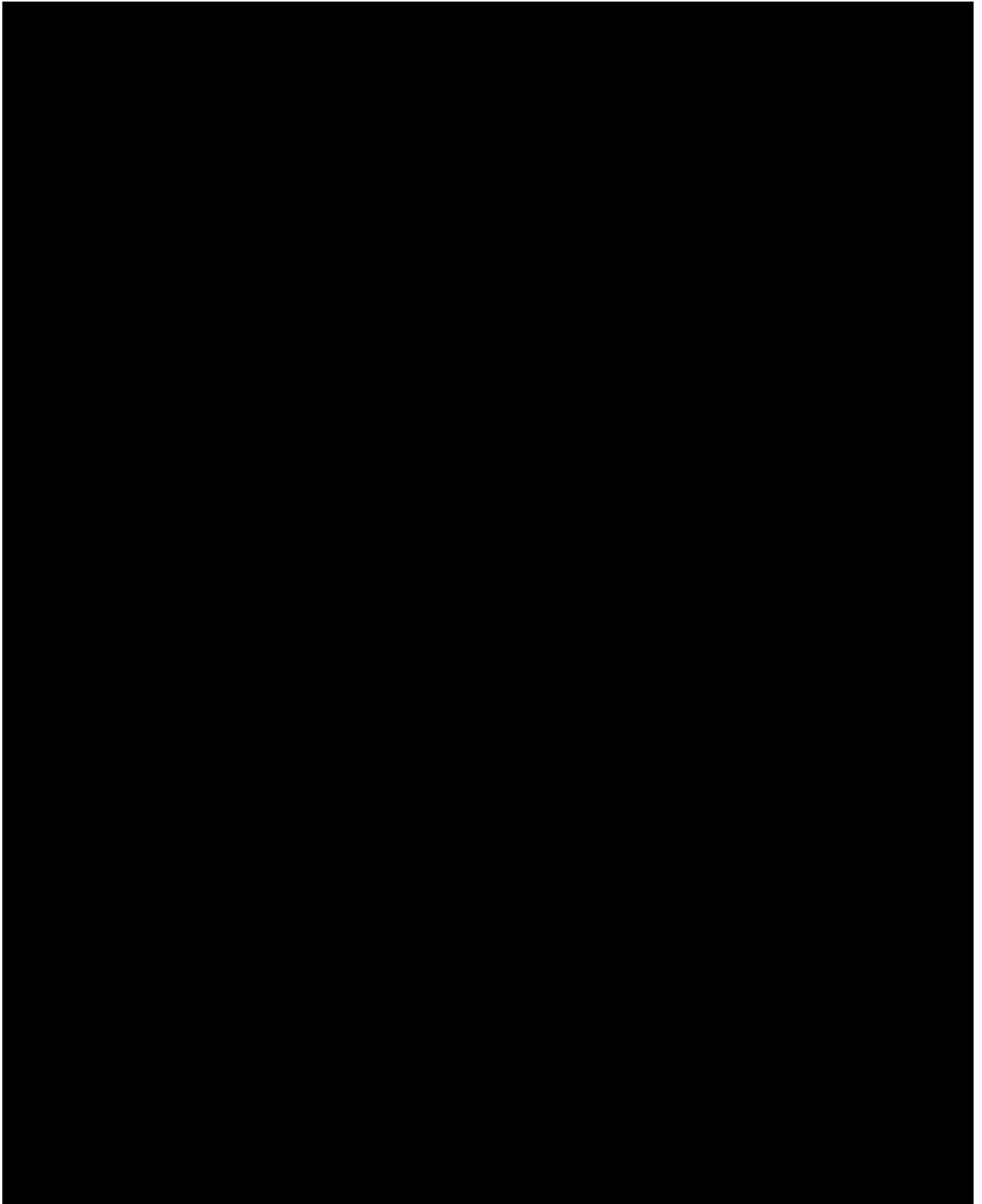


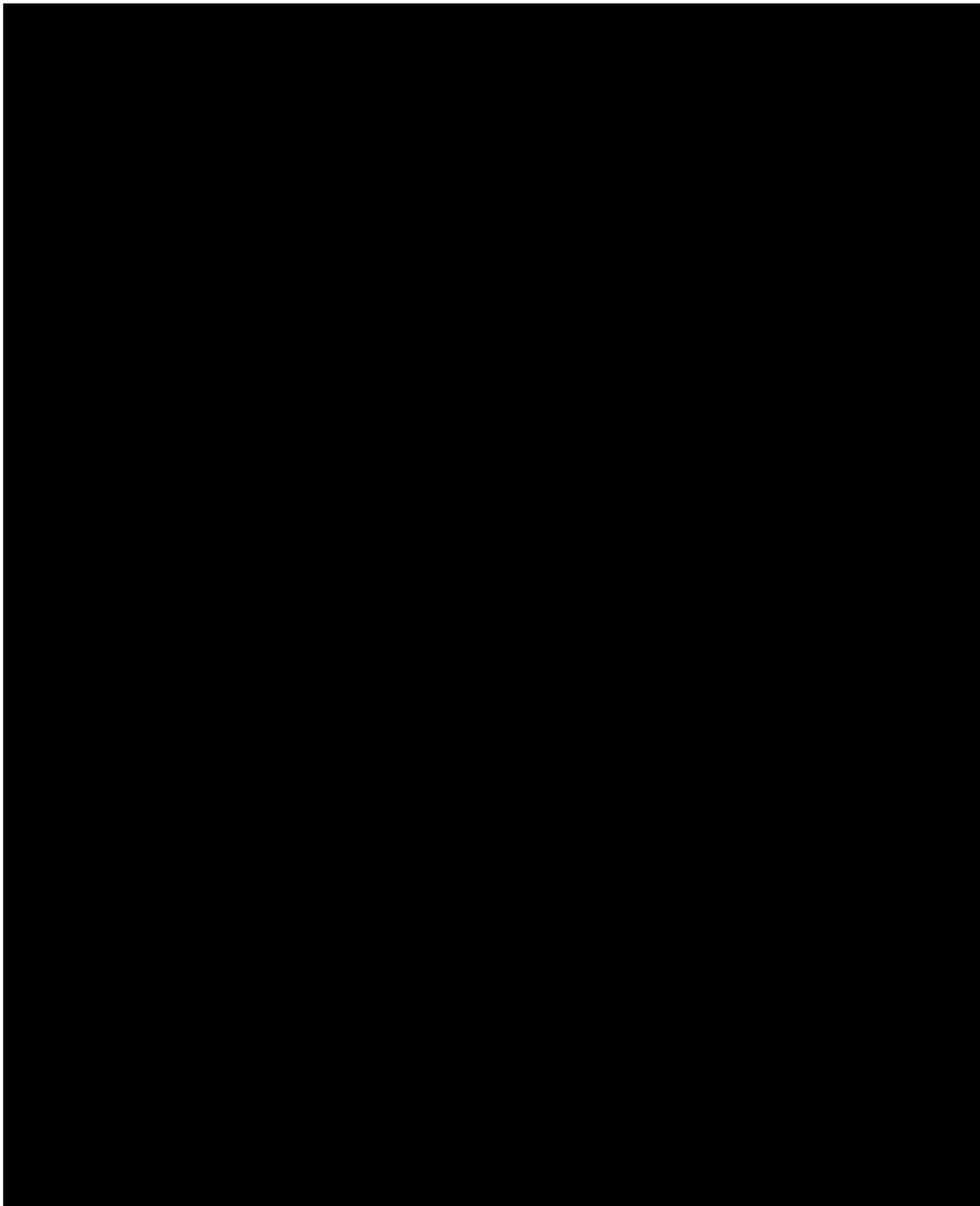


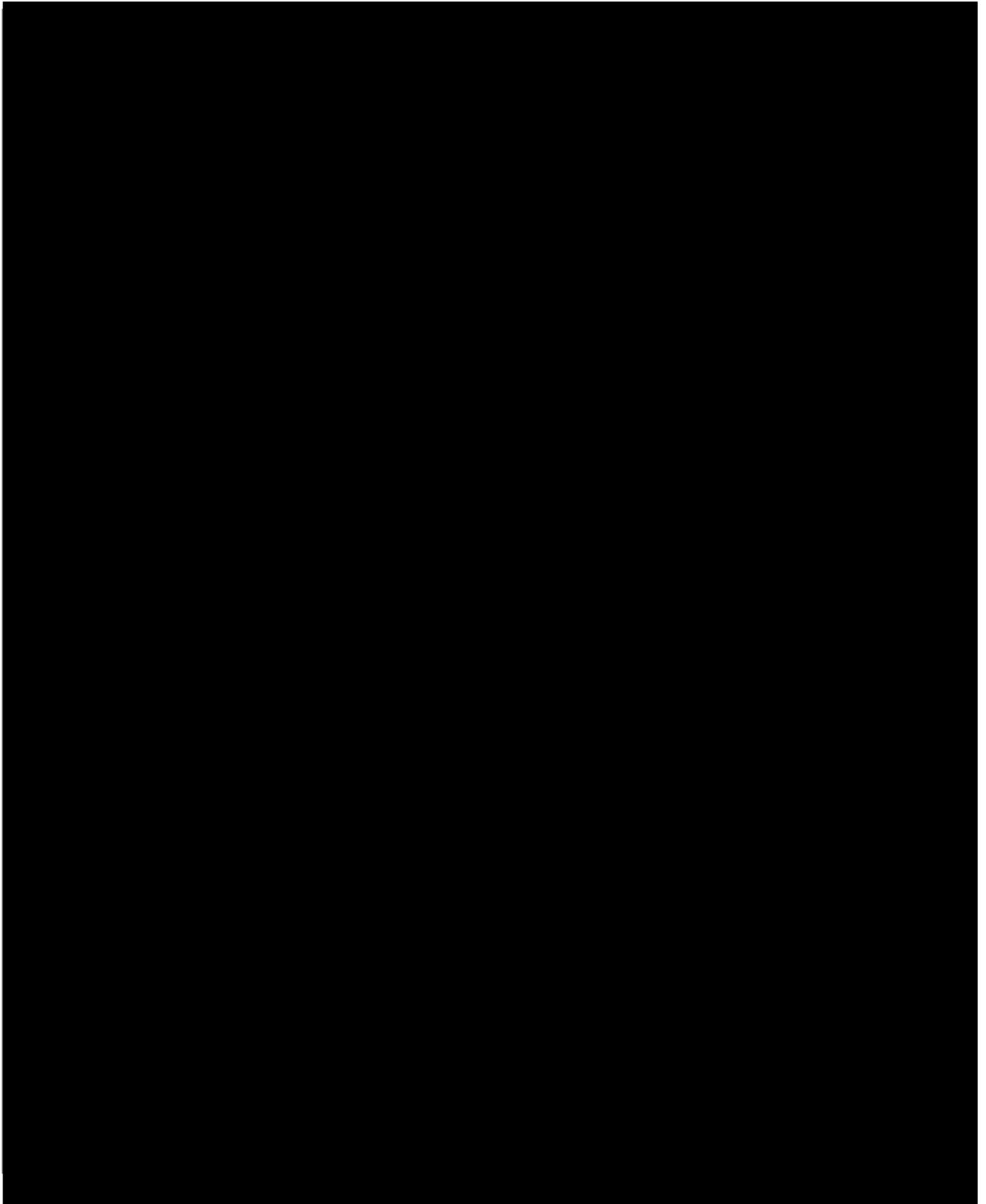


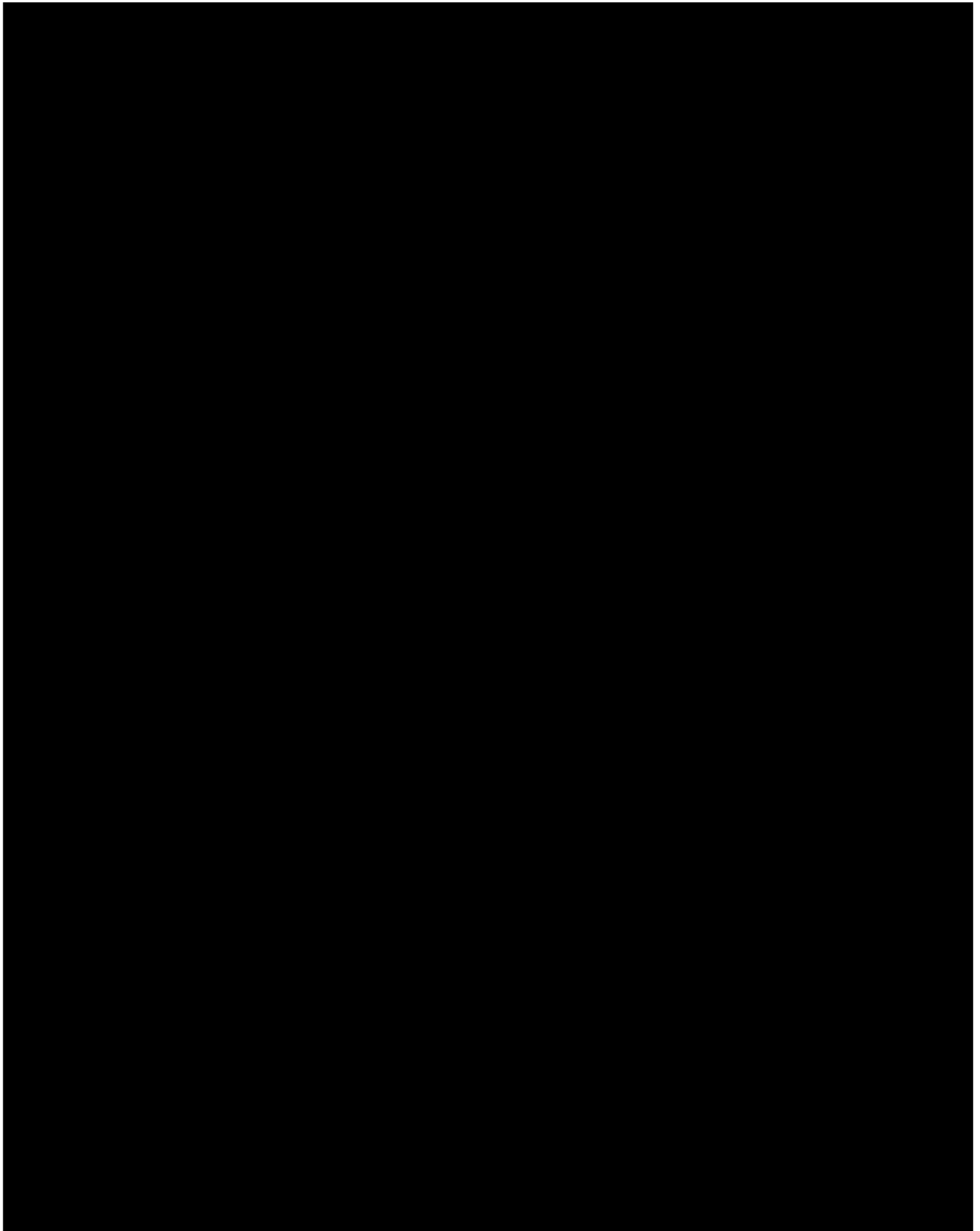


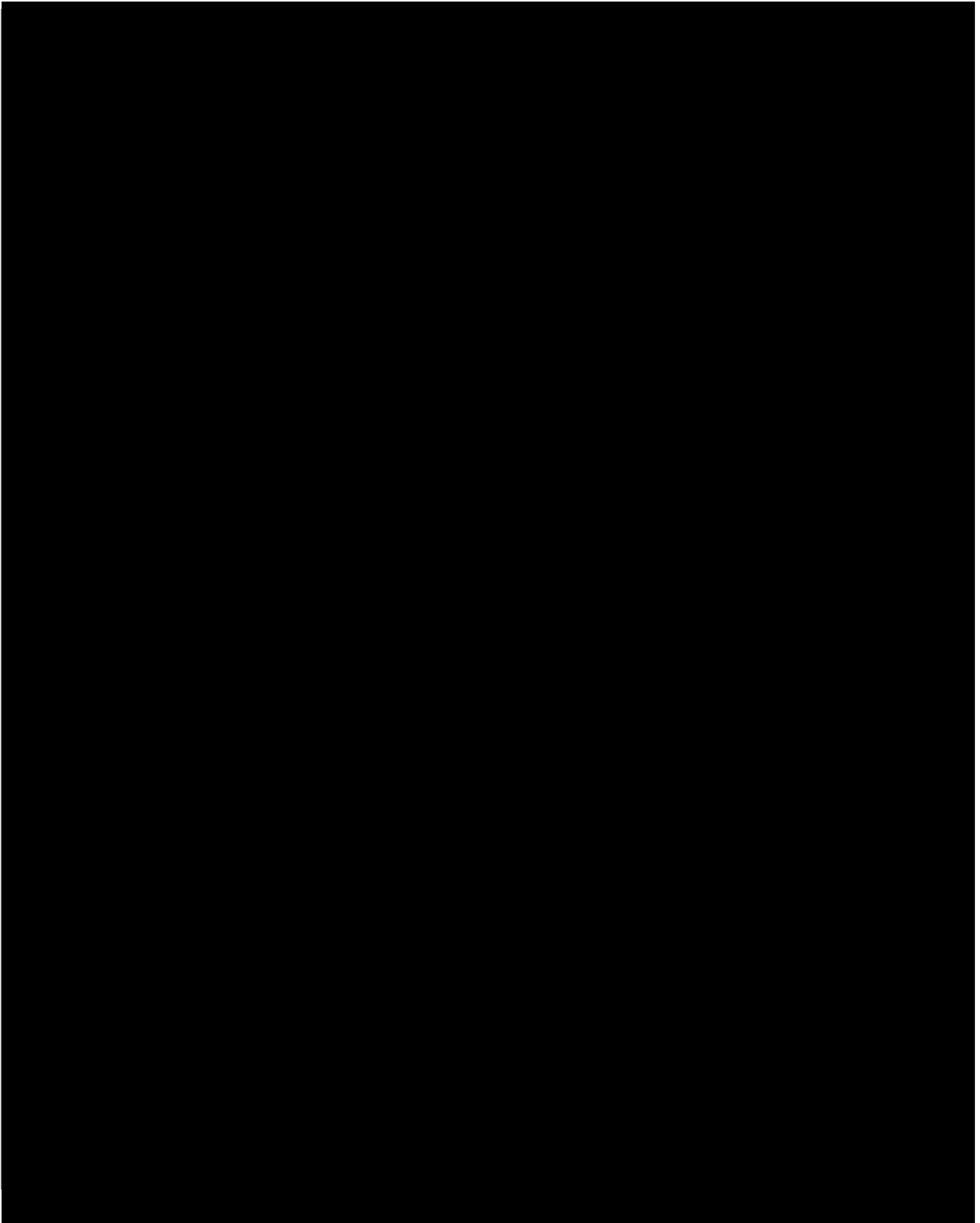


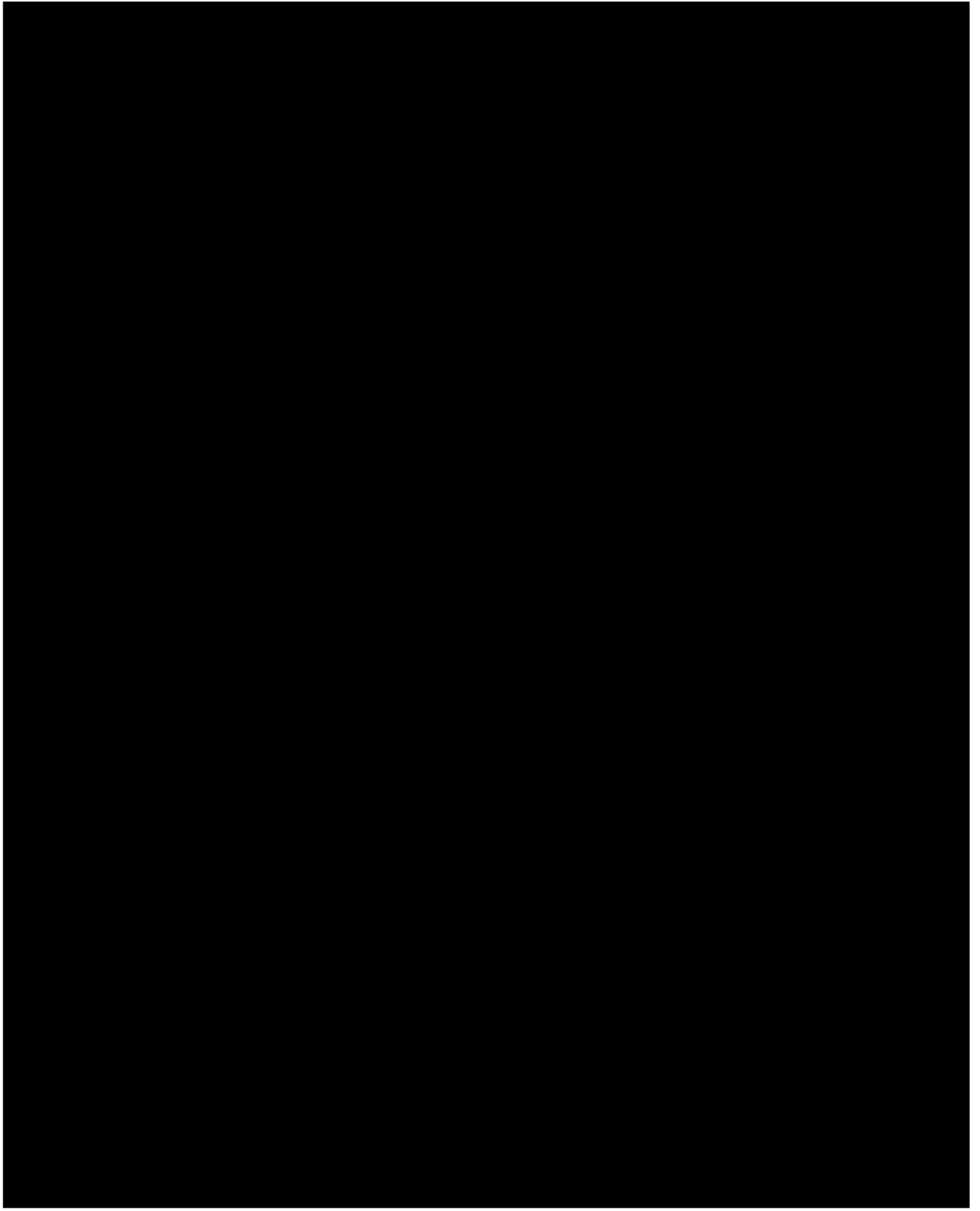


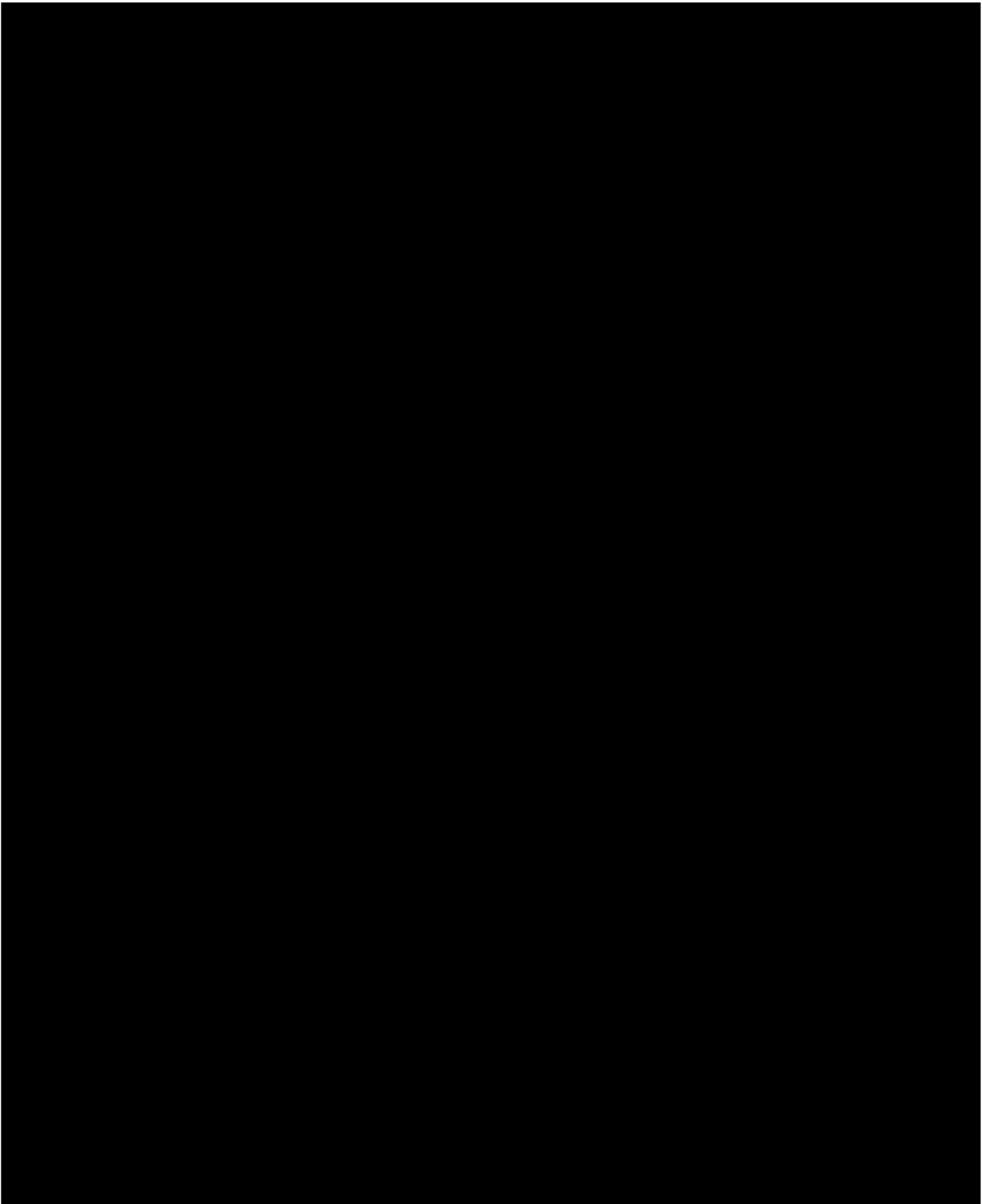


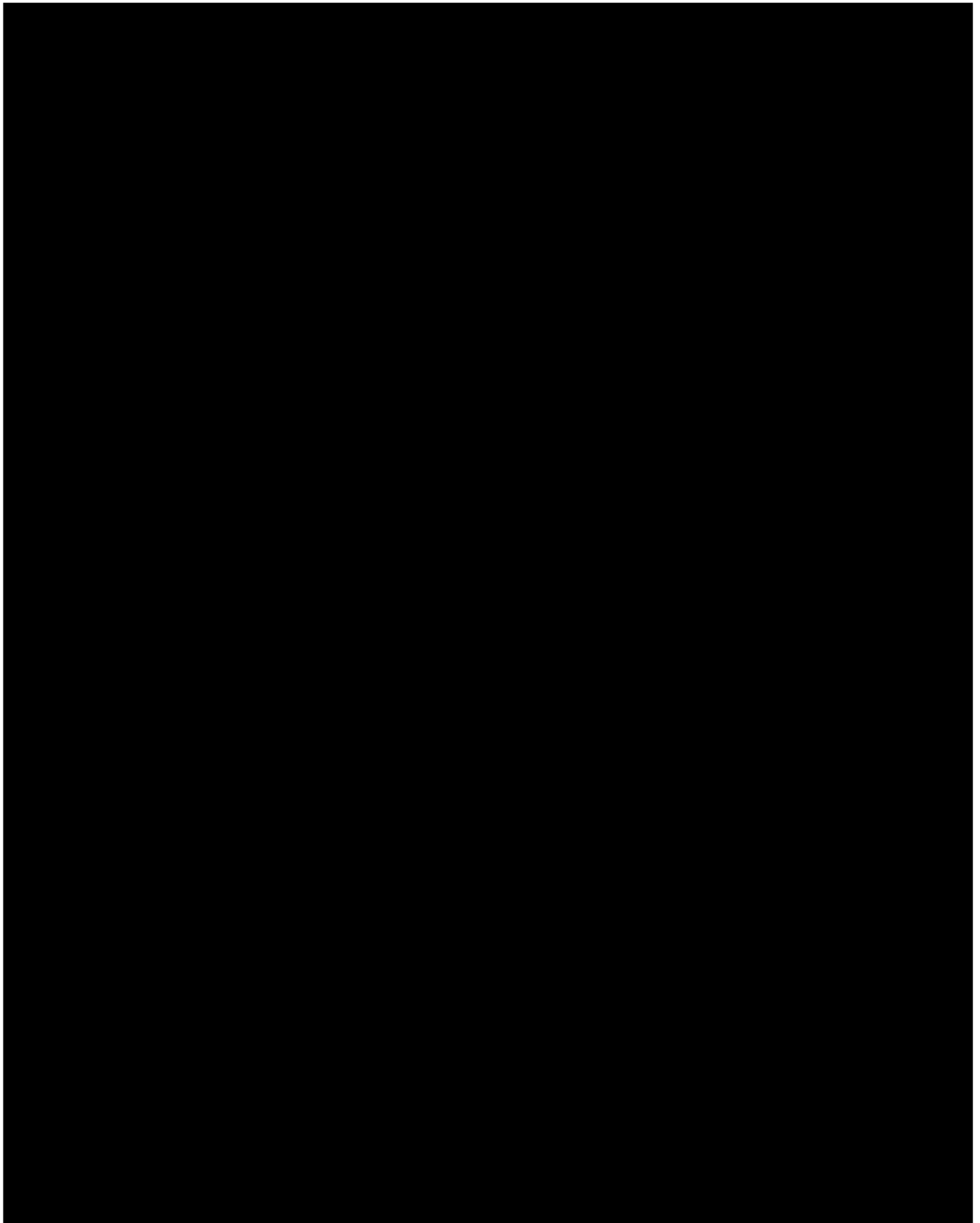


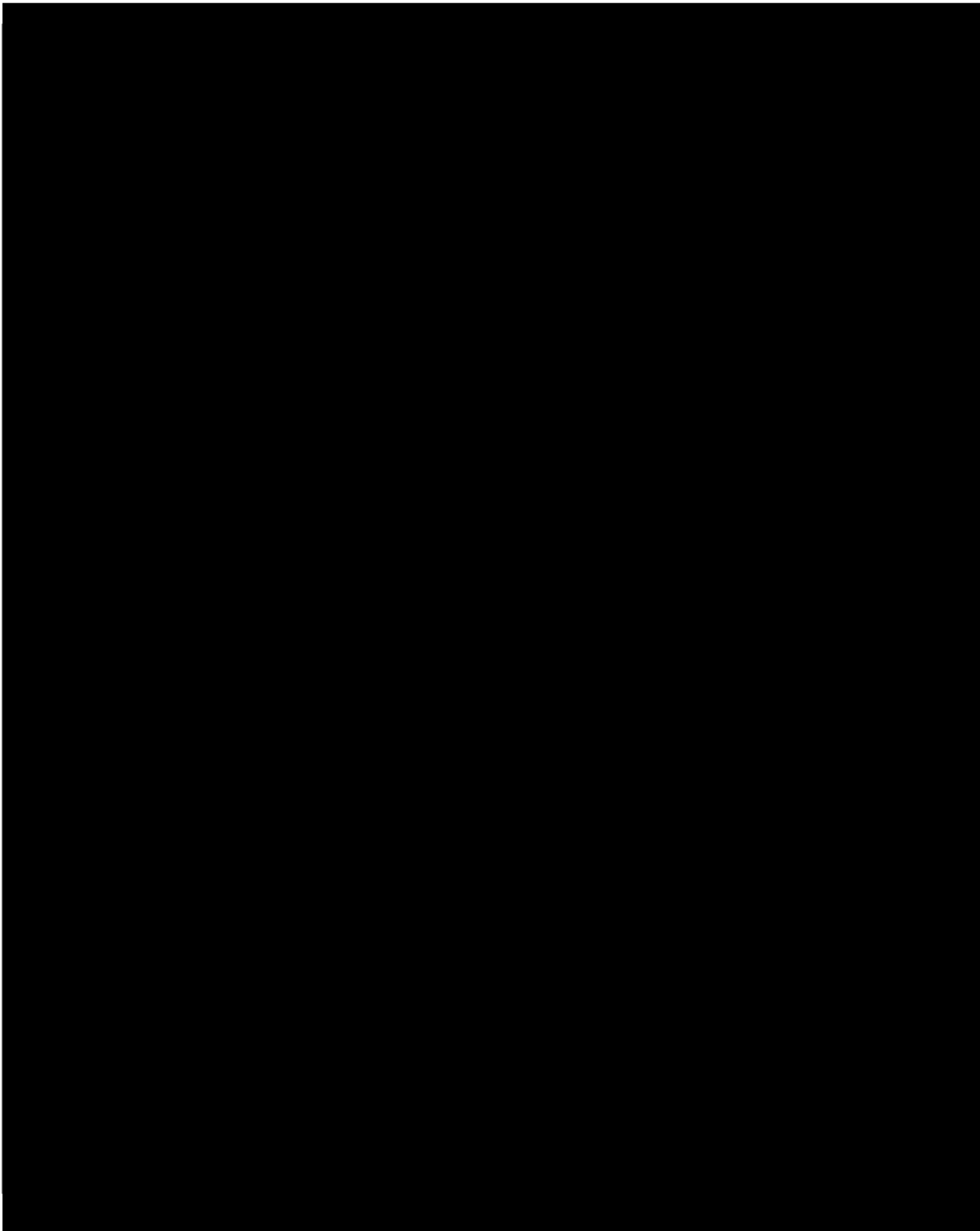


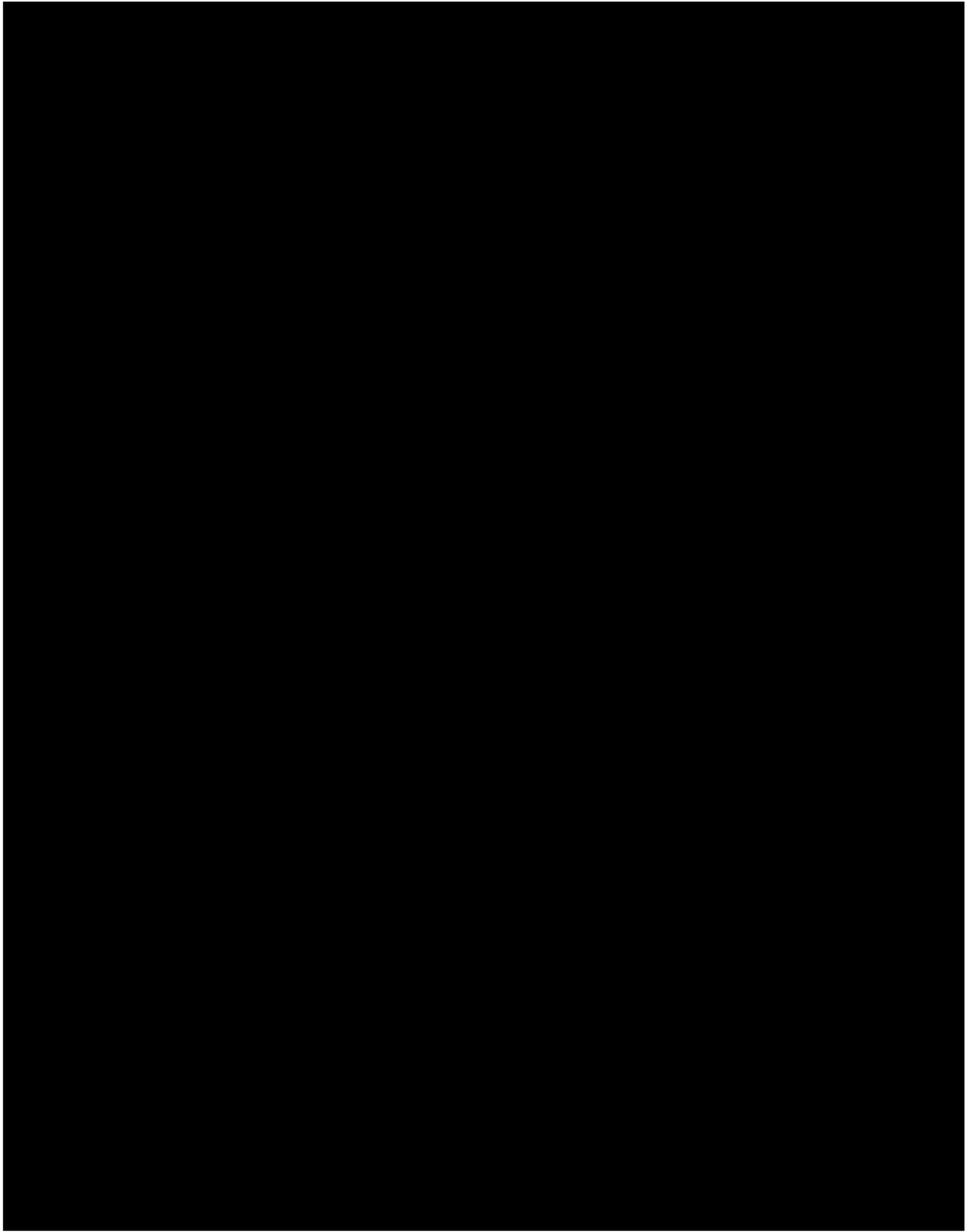


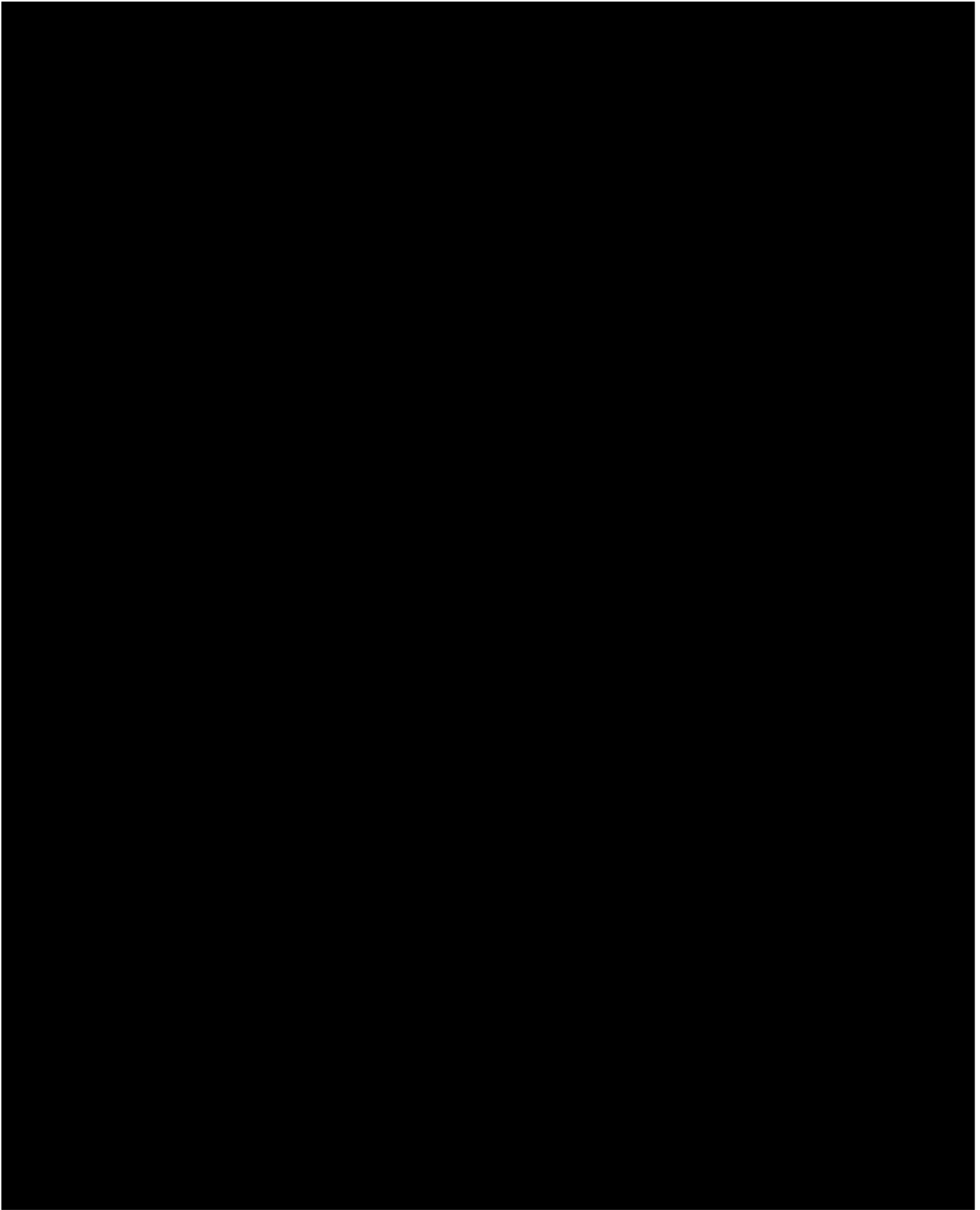


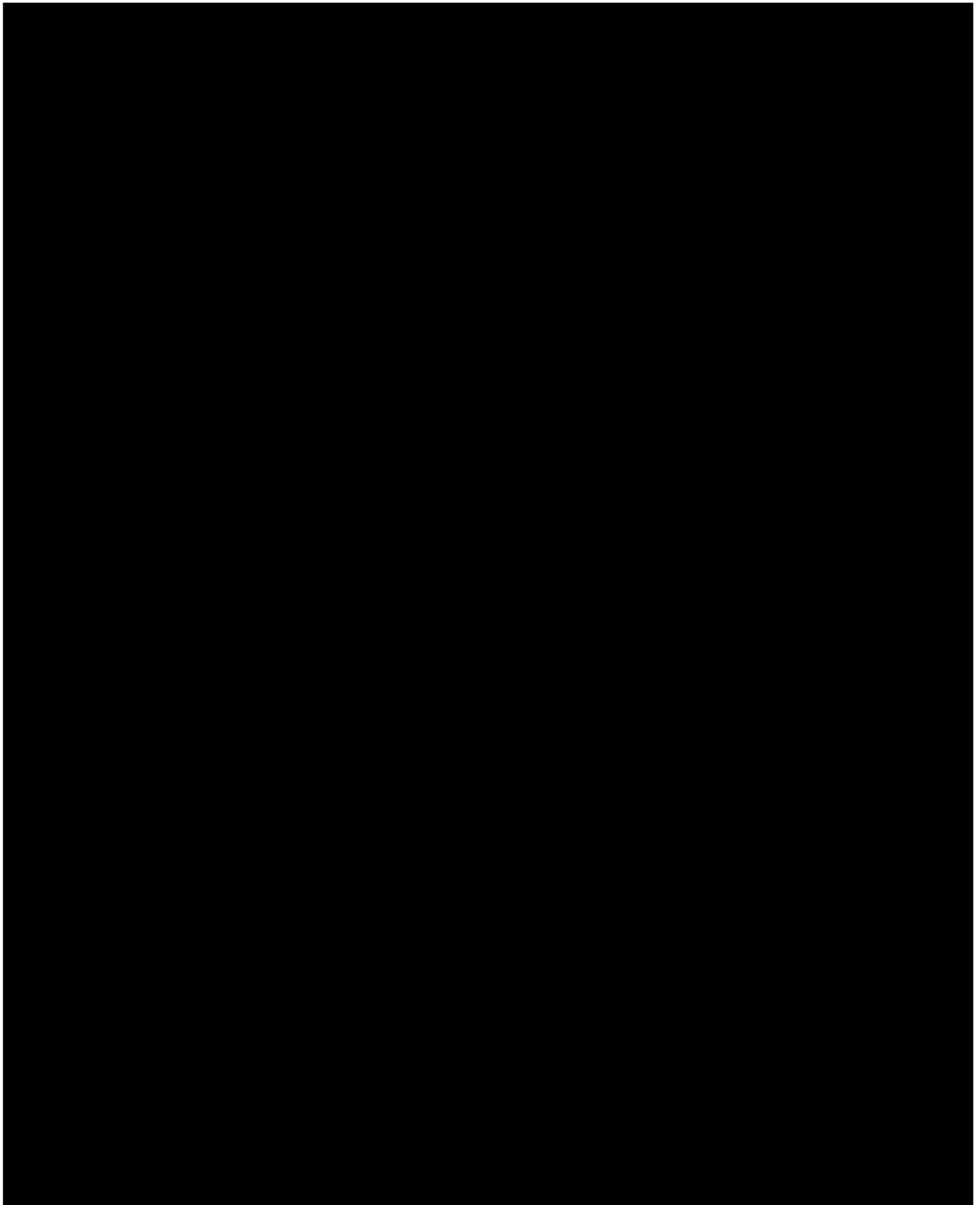


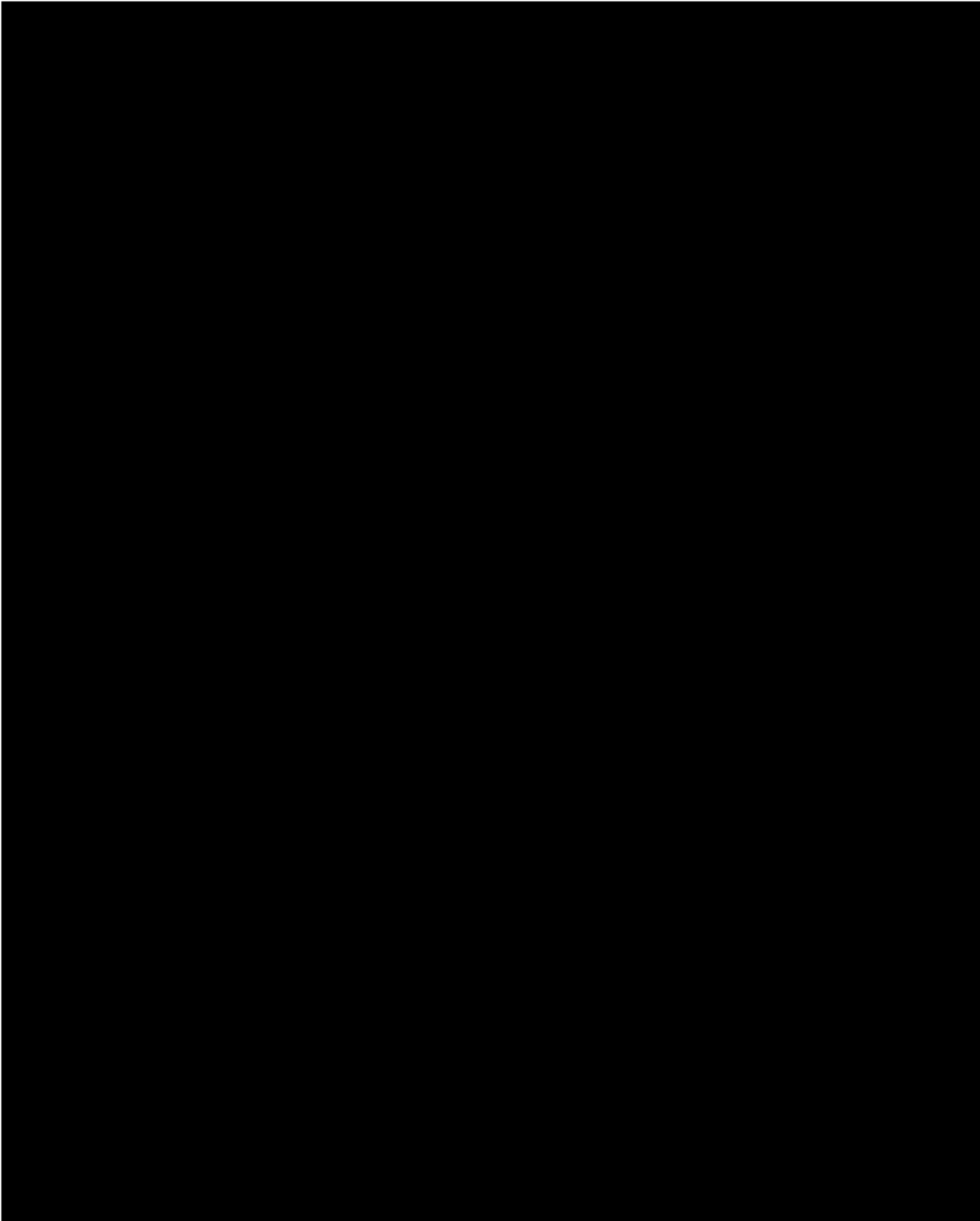


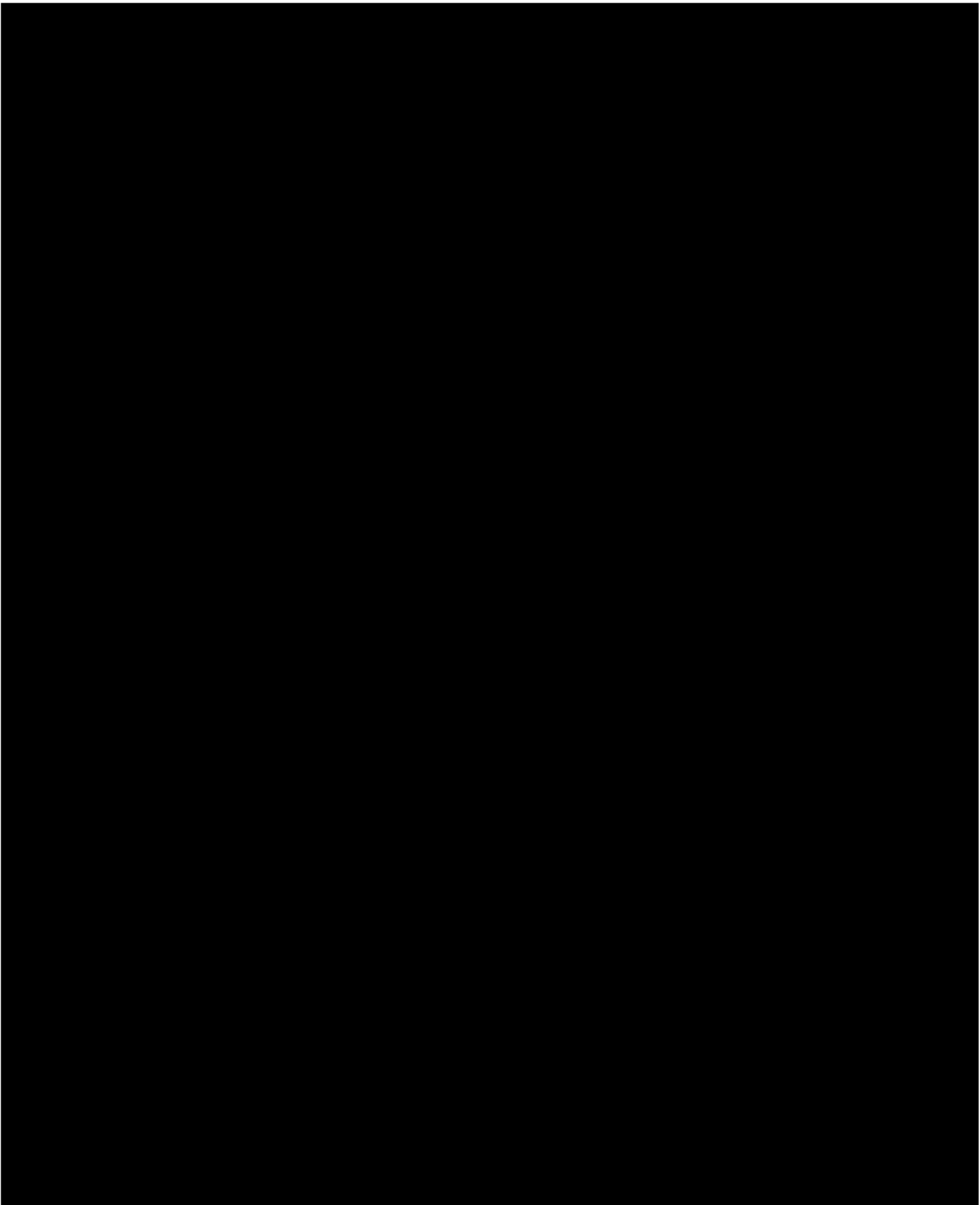




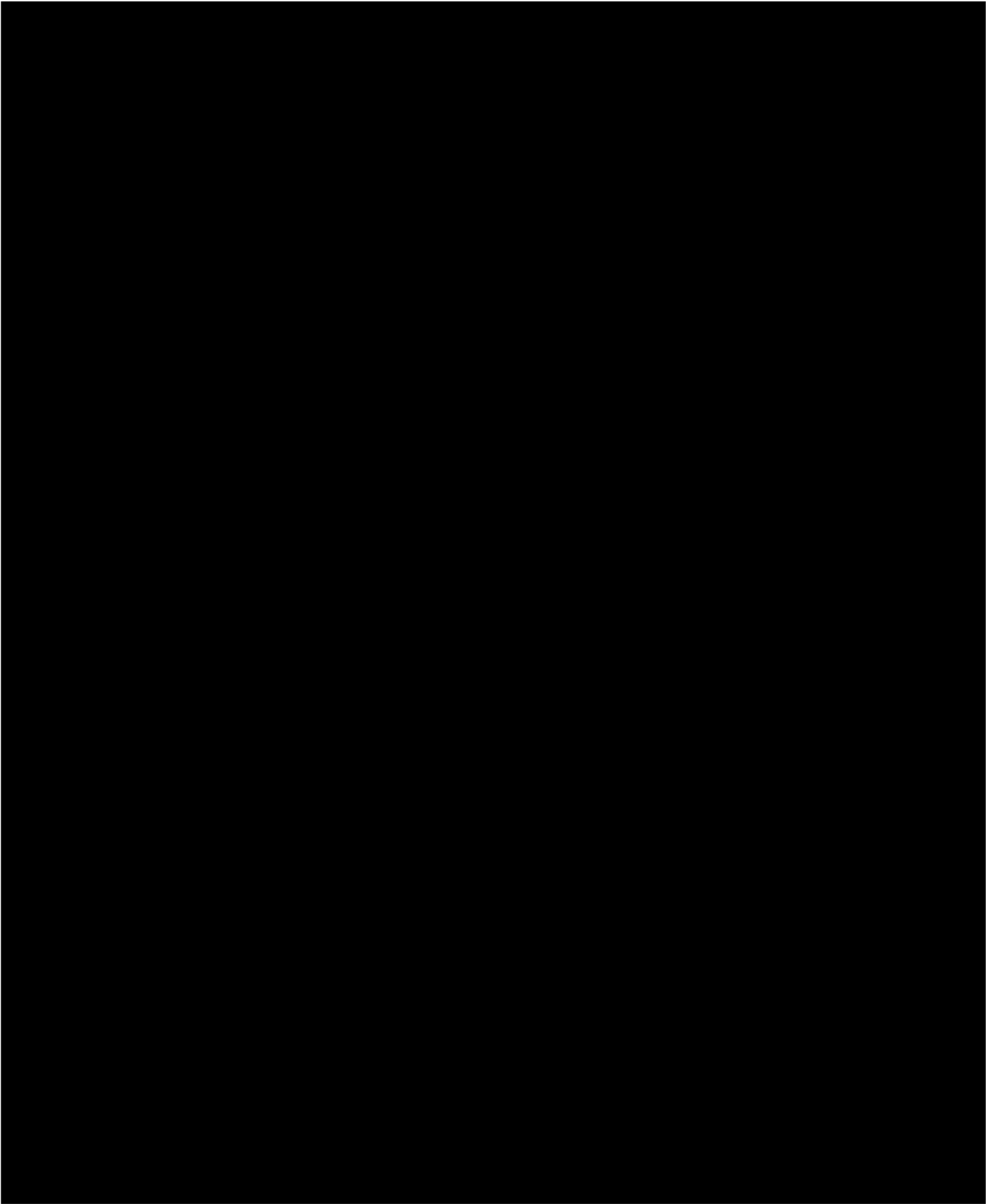


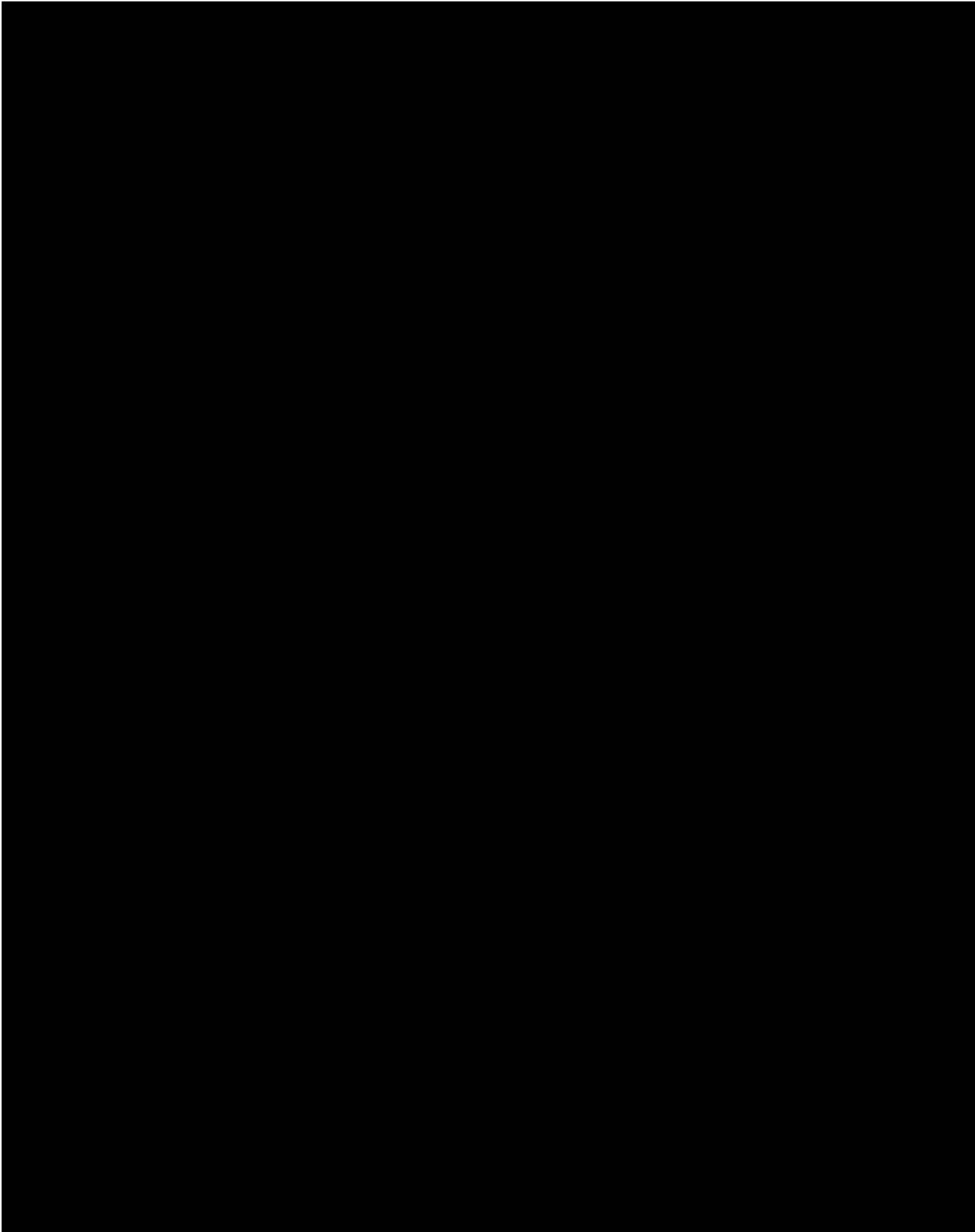


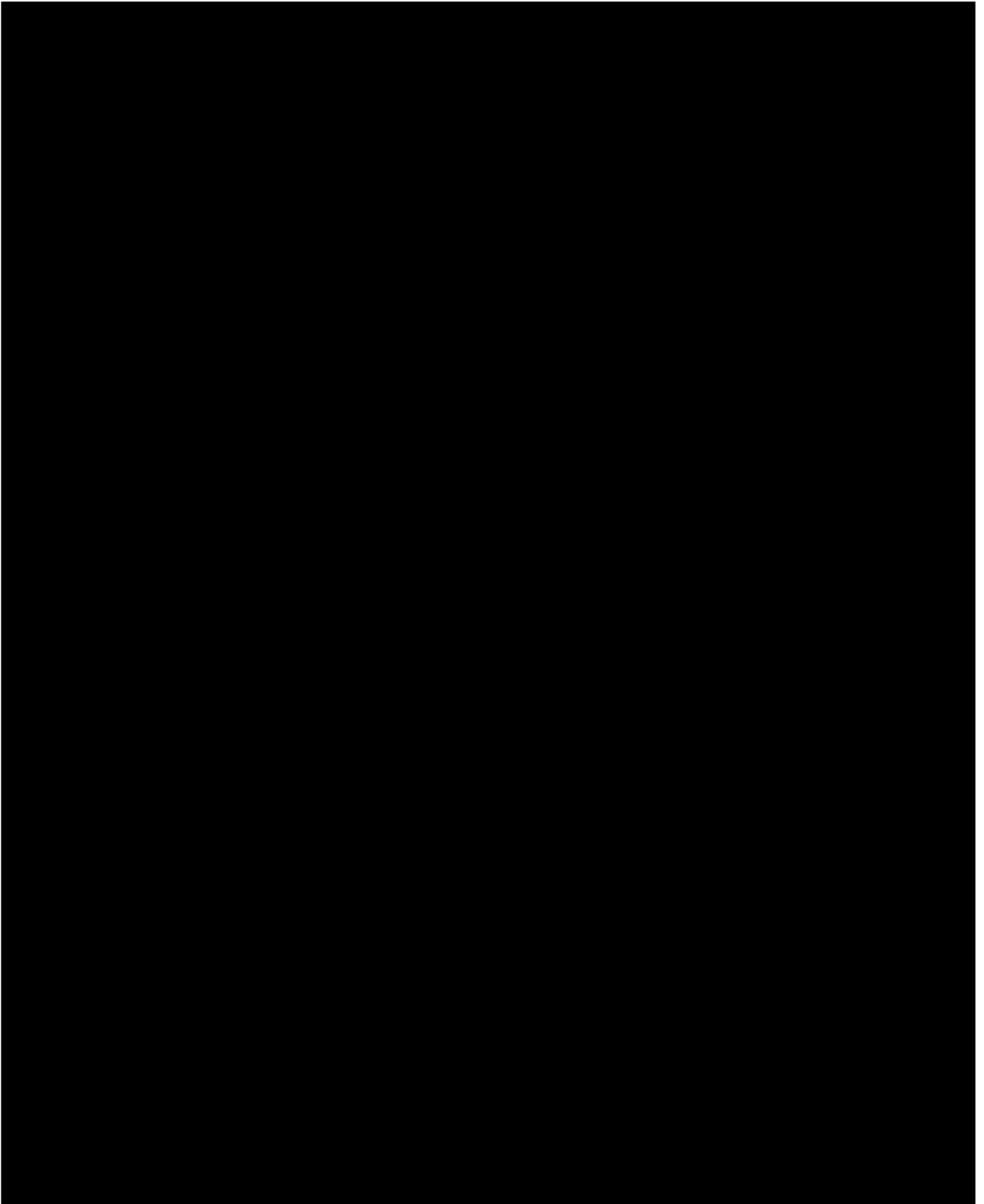


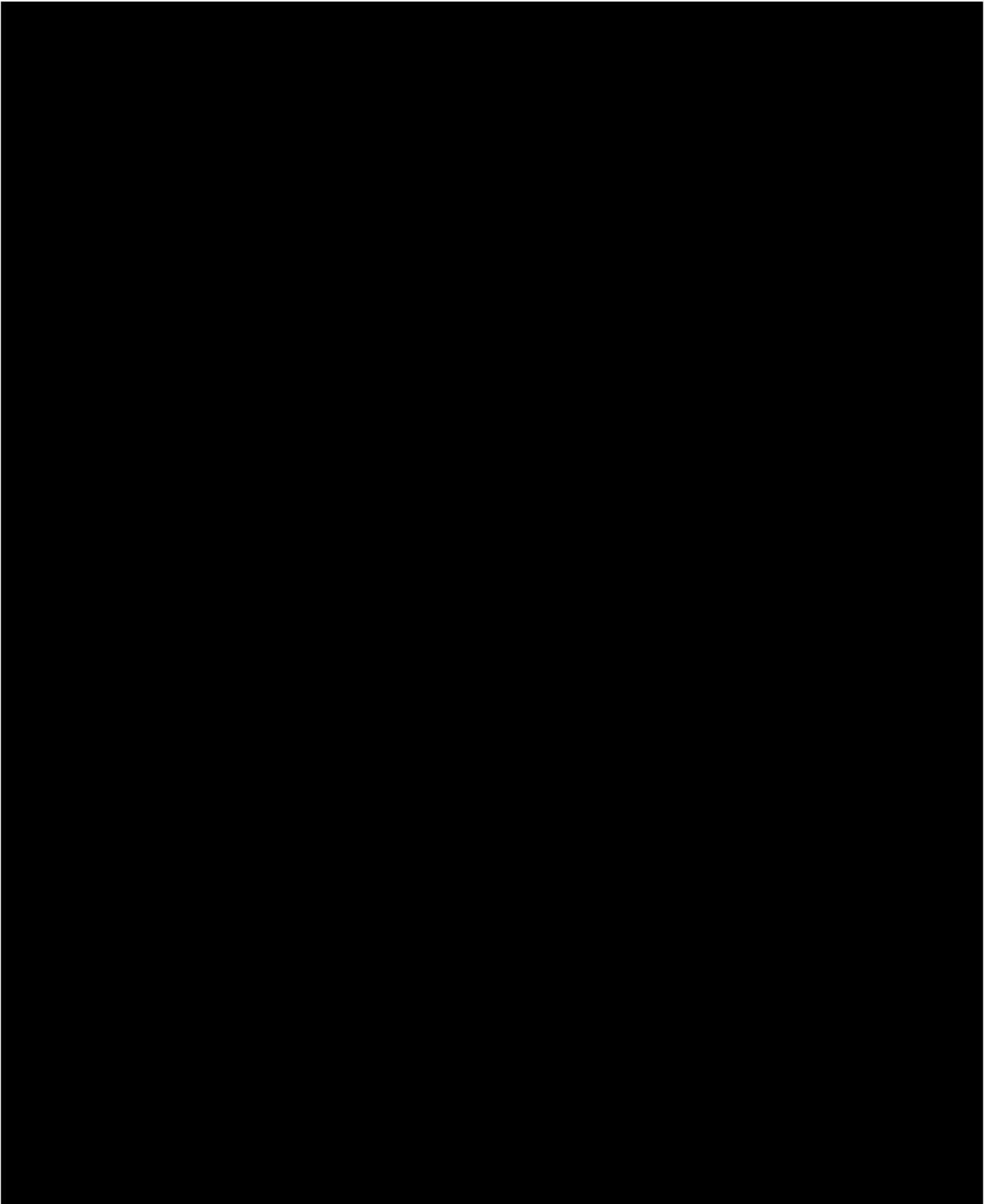






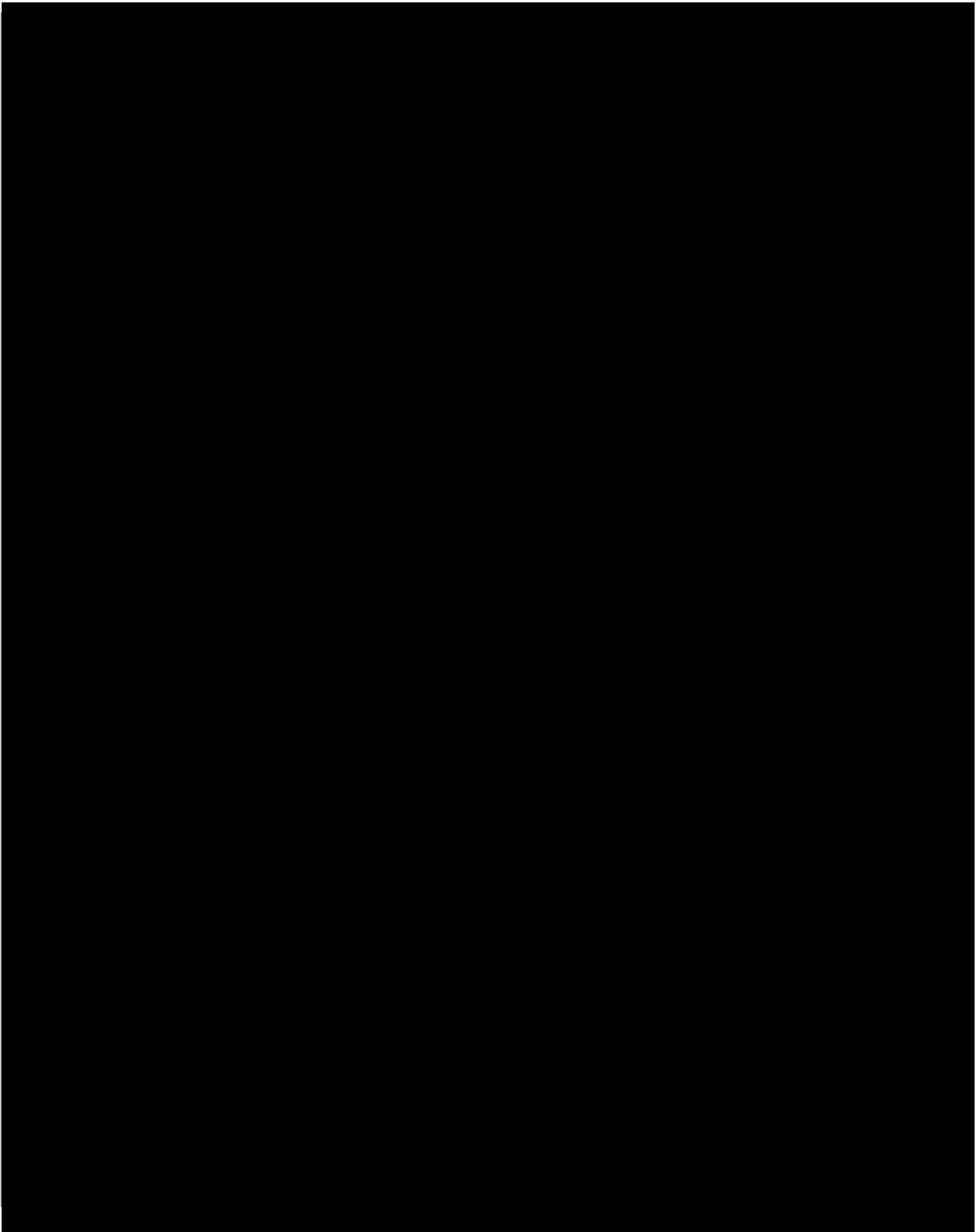


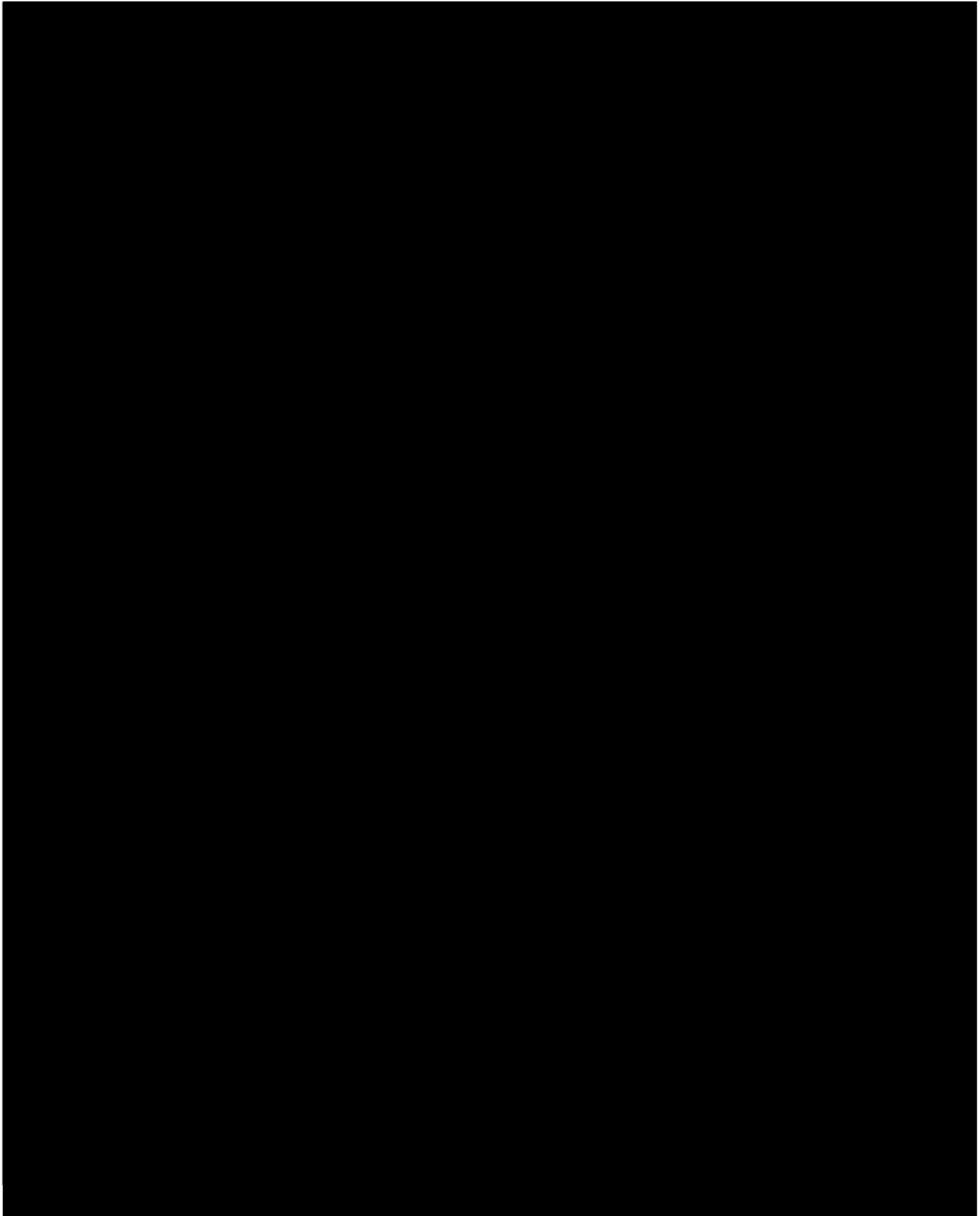


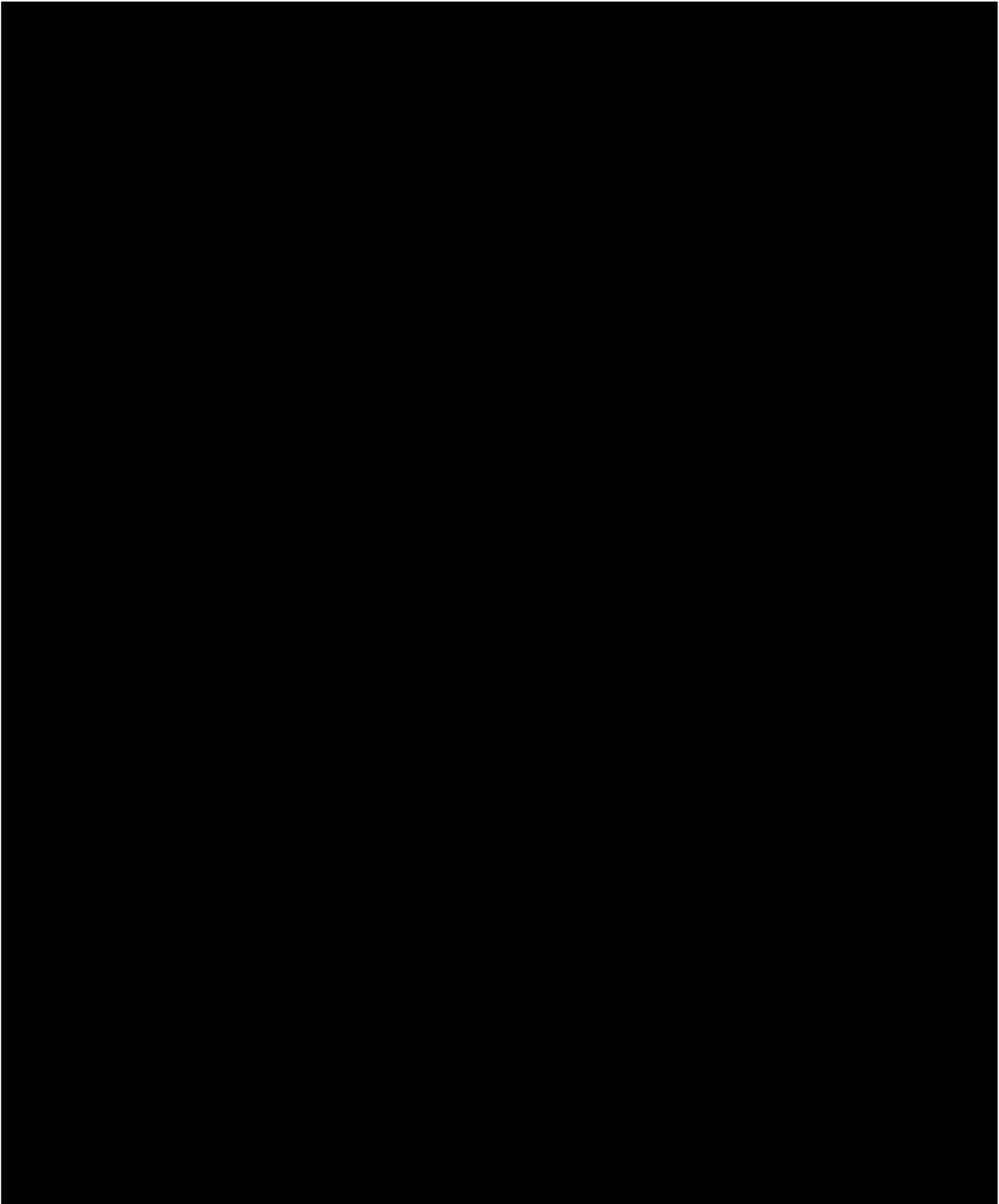


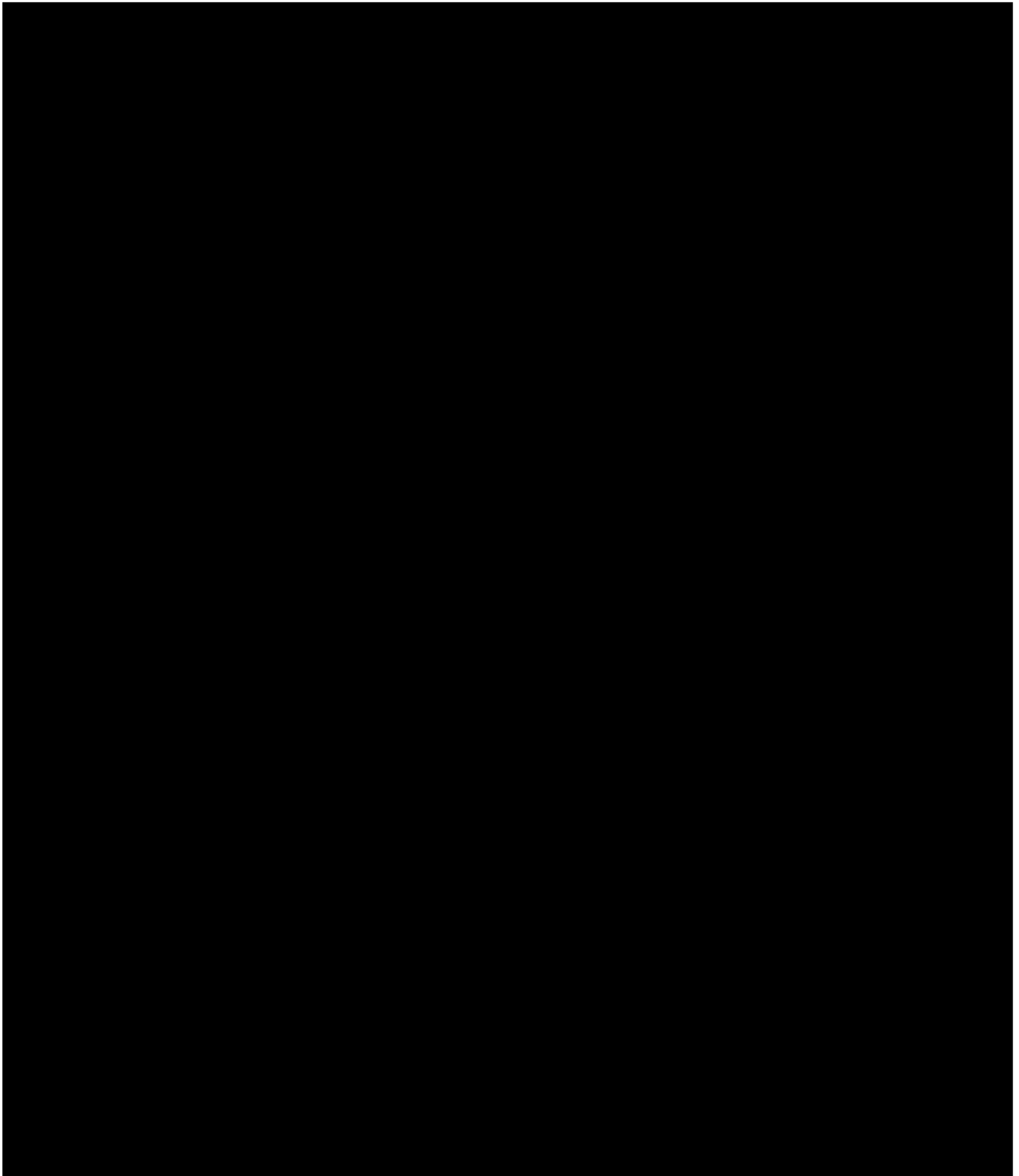


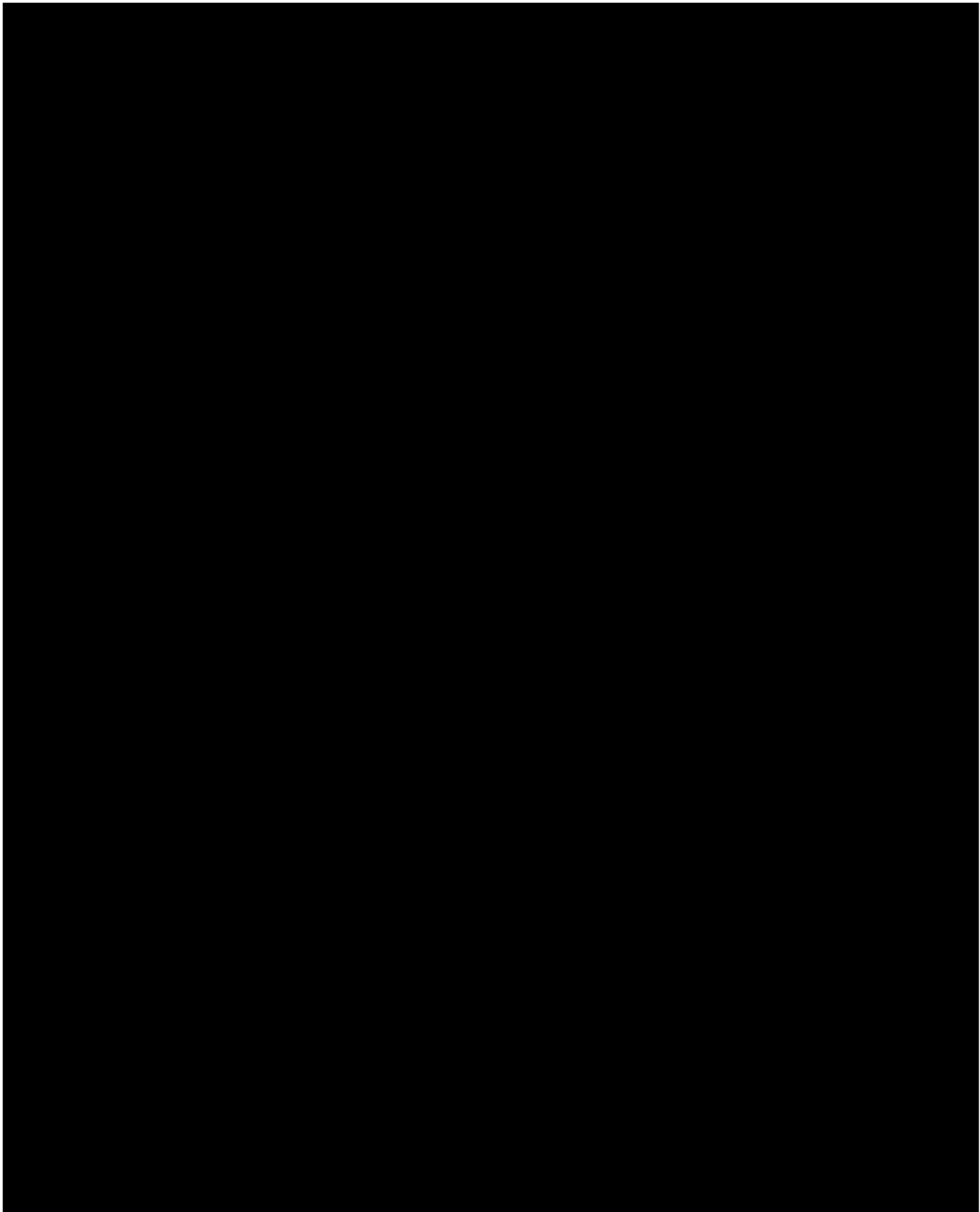
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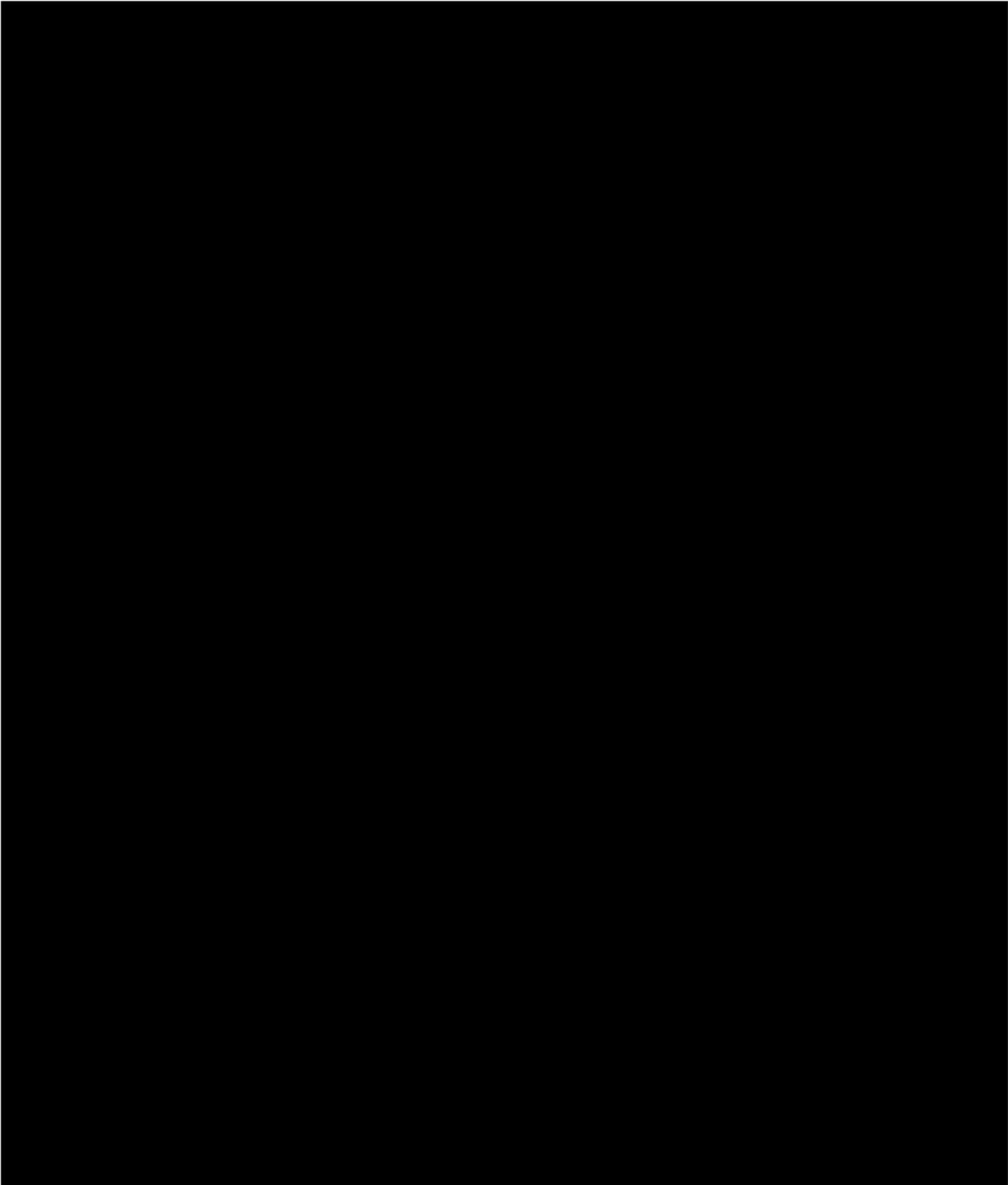














A Full Disclosure of any Events, Liabilities, or Contingent Liabilities

CohnReznick confirms there are no events, liabilities or contingent liabilities to disclose that could affect its financial ability to perform this contract.

05

Redacted Version of Proposal

North Carolina

Department of Commerce – Division of
Community Revitalization

Staff Augmentation

Community Development
Block Grant-Disaster
Recovery
Expert Administrative Support

Request for Proposals #: Doc1677946894





Redacted Version of Proposal

CohnReznick has uploaded our redacted copy of the proposal in Ariba in accordance with Section 2.6 of the RFP. This version is labeled “REDACTED” and includes all required components while omitting confidential and proprietary information as defined under N.C. Gen. Stat. § 132-1.2 and § 66-152.

06

List of Errata and Exceptions

North Carolina

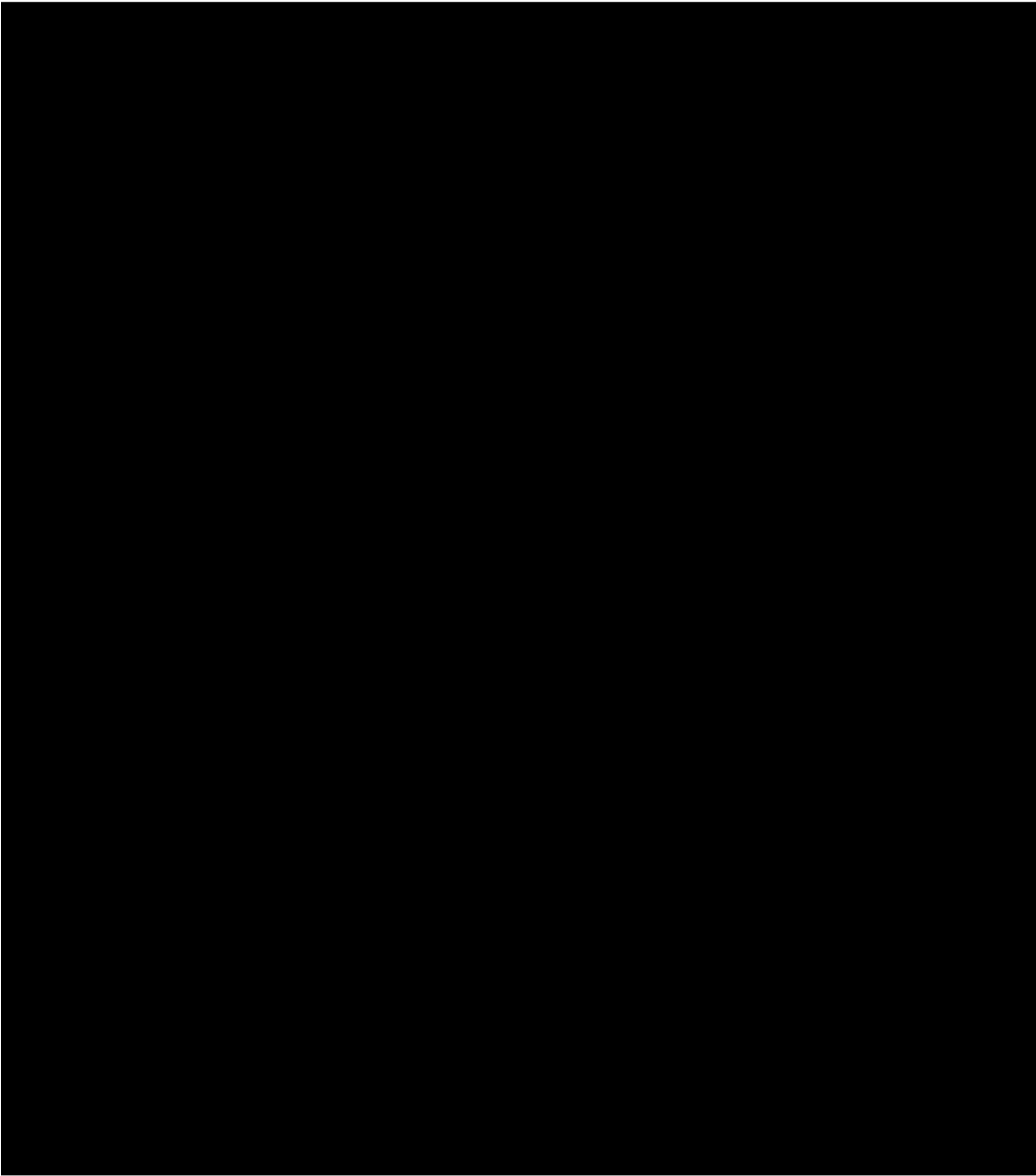
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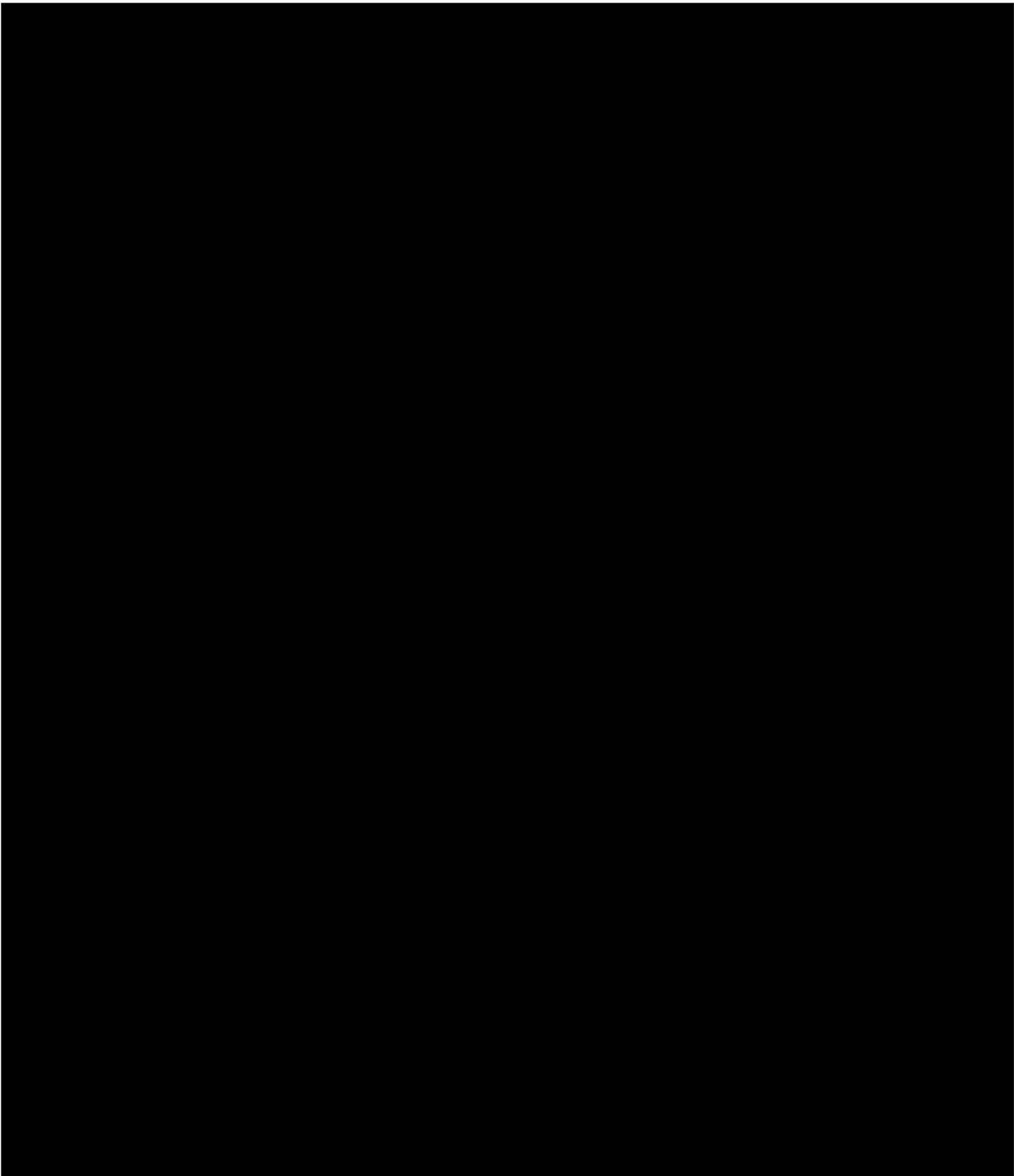
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Choosing the right firm is an important decision

At CohnReznick, we build strong, collaborative relationships to provide successful disaster recovery outcomes.

Our team goes beyond routine support by identifying opportunities for improvement, thinking strategically about resilience, and translating those strategies into actionable solutions. We combine the resources of a national firm with the personal attention of a trusted advisor, delivering efficient, adaptable services even in rapidly changing circumstances.

Our goal is to support DCR's goal of helping the State of North Carolina recover quickly and strengthen community resilience for the long term.

