

Contract Award

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

Task Order Categories Awarded:

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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

TASK 10 – Audit Readiness and Monitoring Support

TASK 12 – Training, Technical Assistance, and Capacity Building

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

STATE OF NORTH CAROLINA
Division of Community Revitalization (DCR)

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

EXECUTION

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

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

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

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

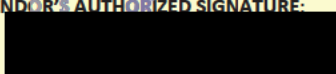
- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

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

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

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

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

COMPLETE/FORMAL NAME OF VENDOR: Hagerty Consulting, Inc.		
STREET ADDRESS: 161 Orrington Avenue, Suite 201	P.O. BOX:	ZIP: 60201
CITY & STATE & ZIP: vanston, I 60201	TELEPHONE NUMBER: 47-4 2- 454	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Katie Freeman, Director of Operations	FAX NUMBER: 47- 5 -1710	
VENDOR’S AUTHORIZED SIGNATURE: 	DATE: 10 25	EMAIL: Katie.Freeman hagertyconsulting.com

Proposal Number: Doc1677946894

Vendor: Hagerty Consulting, Inc.

VALIDITY PERIOD

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

ACCEPTANCE OF PROPOSAL

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

<p>FOR STATE USE ONLY Signed by: _____ d Contract awarded this <u>19th</u> day of <u>December</u>, 2025, as indicated on the attached certification, by _____ (Authorized Representative of Department of Commerce).</p>



**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): Hagerty Consulting, Inc.

Authorized Signature: [Redacted Signature]

Name and Title: Katie Freeman

Date: Director of Operations

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>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
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TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			

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TASK 5 – Claims, Appeals, and Case Reviews			
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TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
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TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
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TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
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CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
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>			
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CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 12 – Training, Technical Assistance, and Capacity			

Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
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CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
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TASK 15 – Grant Management			
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TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST

Initial Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			
Reevaluation Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			

1. Title Page

Staff Augmentation

Community Development Block Grant – Disaster Recovery Expert Administrative Support

Proposal for the North Carolina Department of Commerce,
Division of Community Revitalization Submitted by Hagerty
Consulting, Inc.

Due September 11, 2025, at 2:00PM ET

Vendor's Name, Business Address, and Phone Number

Hagerty Consulting, Inc.
1618 Orrington Ave, Suite 201, Evanston, IL 60201
847-492-8454

Name and Title of An Authorized Representative

Katie Freeman, Director of Operations

RFP Number

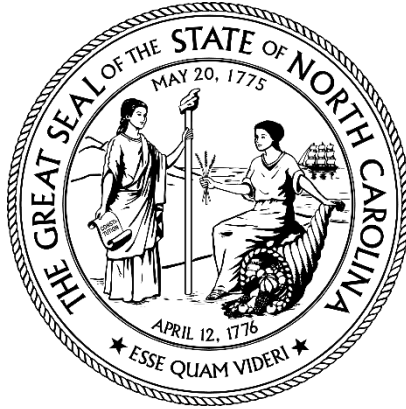
Doc1677946894

Conflicts of Interest

Hagerty Consulting, Inc. has no actual or potential conflicts of interest involving Hagerty Consulting, Inc. or our key personnel.



2. Signed Execution Pages and Signed Addenda



**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

Contents

1.0	PURPOSE AND BACKGROUND – AGENCY SPECIFIC TERM CONTRACT	6
2.0	GENERAL INFORMATION	7
2.1	REQUEST FOR PROPOSALS AND TASK ORDERS	7
2.2	ePROCUREMENT FEE	7
2.3	NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS	7
2.4	RFP SCHEDULE	8
2.5	RFP QUESTIONS	8
2.6	RFP SUBMITTAL	8
2.7	PROPOSAL CONTENTS	9
2.8	DEFINITIONS, ACRONYMS, AND ABBREVIATIONS	10
3.0	METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS	11
3.1	METHOD OF AWARD	11
3.2	CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION	12
3.3	PROPOSAL EVALUATION PROCESS	12
3.4	EVALUATION CRITERIA	13
3.5	PERFORMANCE OUTSIDE THE UNITED STATES	14
3.6	INTERPRETATION OF TERMS AND PHRASES	14
4.0	REQUIREMENTS	14
4.1	TASK ORDER CATEGORIES	14
4.2	PRICING	15
4.3	PAYMENT STRUCTURE	15
4.4	INVOICES	15
4.5	HUB PARTICIPATION	15
4.6	BACKGROUND CHECKS	16
4.7	PERSONNEL	16
4.8	VENDOR’S REPRESENTATIONS	16
4.9	INSURANCE REQUIREMENTS	16
4.10	LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS	17
4.11	FINANCIAL INFORMATION	17
5.0	SCOPE OF WORK	18
5.1	GENERAL	18
5.2	TASKS / DELIVERABLES	19

5.3 TASK ORDER METHODOLOGY.....24

5.4 TRANSITION ASSISTANCE.....24

6.0 CONTRACT ADMINISTRATION25

6.1 PROJECT MANAGER AND CUSTOMER SERVICE25

6.2 PERFORMANCE.....25

6.3 DISPUTE RESOLUTION25

6.4 CONTRACT CHANGES25

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING.....26

ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS29

ATTACHMENT C: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS.....38

ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR.....54

ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION55

ATTACHMENT F: CERTIFICATION FOR CONTRACTS, GRANTS, LOANS AND COOPERATIVE AGREEMENTS.....56

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES.....57

ATTACHMENT H: EXPERIENCE.....58

1.0 PURPOSE AND BACKGROUND – AGENCY SPECIFIC TERM CONTRACT

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

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

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

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

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

1.1 CONTRACT TERM

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

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

2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSALS AND TASK ORDERS

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

2.2 ePROCUREMENT FEE

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

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

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

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

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

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

2.4 RFP SCHEDULE

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

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

2.5 RFP QUESTIONS

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

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

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

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

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

2.6 RFP SUBMITTAL

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

Offers to be submitted through eProcurement Sourcing. For training on how to use eProcurement Sourcing, <https://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

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

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

3. Table of Contents

4. Narrative Response: Vendor Qualifications and Approach

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

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

5. Resumes and Bios

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

6. Examples

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

2.8 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

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

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

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

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

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

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

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

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

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

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

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

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

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

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

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

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

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

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

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

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

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

3.4 EVALUATION CRITERIA

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

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

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

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

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

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

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

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

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

3.6 INTERPRETATION OF TERMS AND PHRASES

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

4.0 REQUIREMENTS

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

4.1 TASK ORDER CATEGORIES

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

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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

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

TASK 10 – Audit Readiness and Monitoring Support

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

TASK 12 – Training, Technical Assistance, and Capacity Building

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

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

4.2 PRICING

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

4.3 PAYMENT STRUCTURE

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

4.4 INVOICES

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

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

4.5 HUB PARTICIPATION

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

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

4.6 BACKGROUND CHECKS

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

4.7 PERSONNEL

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

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

4.8 VENDOR'S REPRESENTATIONS

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

4.9 INSURANCE REQUIREMENTS

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

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

4.10 LOBBYING ACTIVITY CERTIFICATION FOR FEDERAL GRANTS

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

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

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

4.11 FINANCIAL INFORMATION

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

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

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

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

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

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

5.0 SCOPE OF WORK

5.1 GENERAL

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

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

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

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

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

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

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

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

5.2 TASKS / DELIVERABLES

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

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

5.2.3 TASK 3 – Duplication of Benefits (DOB) Compliance

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

Anticipated Deliverables:

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

5.2.4 TASK 4 – Procurement Compliance and Monitoring

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

Anticipated Deliverables:

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

5.2.5 TASK 5 – Claims, Appeals, and Case Reviews

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

Anticipated Deliverables:

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

5.2.6 TASK 6 – Action Plan Development and Amendments

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

5.2.8 TASK 8 – Program Performance Monitoring and Evaluation

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

5.2.10 TASK 10 – Audit Readiness and Monitoring Support

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

- Relocation policies, procedures, SOPs, and workflows

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

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

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

Anticipated Deliverables:

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

5.2.15 TASK 15 – Grant Management

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

Anticipated Deliverables:

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

5.2.16 TASK 16 – Technical Systems Specification & Project Management

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

Anticipated Deliverables:

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

5.2.17 TASK 17 – Environmental Review

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

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

Anticipated Deliverables

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

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

5.3 TASK ORDER METHODOLOGY

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

5.4 TRANSITION ASSISTANCE

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

6.0 CONTRACT ADMINISTRATION

6.1 PROJECT MANAGER AND CUSTOMER SERVICE

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

6.2 PERFORMANCE

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

6.3 DISPUTE RESOLUTION

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

6.4 CONTRACT CHANGES

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

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

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

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

PRICING:

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

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
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>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
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CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
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CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			
Reevaluation Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			

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

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

ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS

I. READ, REVIEW AND COMPLY

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

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

II. REQUEST FOR OFFERS

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

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

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

III. DUTY TO INQUIRE

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

IV. DEFINITIONS, ACRONYMS AND ABBREVIATIONS

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

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

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

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

V. INTERPRETATION OF TERMS AND PHRASES

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

VI. BID SUBMISSION

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

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

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

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

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

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

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

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

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

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

8. **CONTENTS OF OFFER:**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

ATTACHMENT C: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS

1. PERFORMANCE:

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

2. DEFAULT AND TERMINATION.

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

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

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

3. INTERPRETATION, CONFLICT OF TERMS.

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

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

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

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

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

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

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

7. SITUS AND GOVERNING LAWS;

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

8. NON-DISCRIMINATION COMPLIANCE:

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

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

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

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

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

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

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

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

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

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

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

13. ACCESS TO PERSONS AND RECORDS:

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

v. Access and review

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

14. ASSIGNMENT OR DELEGATION OF DUTIES.

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

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

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

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

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

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

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

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

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

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

16. GENERAL INDEMNITY:

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

17. ELECTRONIC PROCUREMENT:

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

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

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

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

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

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

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

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

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

27. **FEDERAL FUNDS PROVISIONS**

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

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

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

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

Compliance with the Contract Work Hours and Safety Standards Act.

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

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

Clean Air Act

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

Federal Water Pollution Control Act

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

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

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

f) Debarment and Suspension.

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

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

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

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

h) Procurement of Recovered Materials.

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

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

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

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

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

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

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

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

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

ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR

In accordance with NC General Statute 143-59.4, the Vendor shall detail the location(s) at which performance will occur, as well as the manner in which it intends to utilize resources or workers outside of the United States in the performance of this Contract. The State will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award. Please complete items a, b, and c below.

a) Will any work under this Contract be performed outside the United States? YES NO

If the Vendor answered "YES" above, Vendor must complete items 1 and 2 below:

1. List the location(s) outside the United States where work under this Contract will be performed by the Vendor, any sub-Contractors, employees, or other persons performing work under the Contract:

2. Describe the corporate structure and location of corporate employees and activities of the Vendor, its affiliates or any other sub-Contractors that will perform work outside the U.S.:

b) The Vendor agrees to provide notice, in writing to the State, of the relocation of the Vendor, employees of the Vendor, sub-Contractors of the Vendor, or other persons performing services under the Contract outside of the United States YES NO

NOTE: All Vendor or sub-Contractor personnel providing call or contact center services to the State of North Carolina under the Contract **shall** disclose to inbound callers the location from which the call or contact center services are being provided.

c) Identify all U.S. locations at which performance will occur:

Services will be provided from Hagerty's Headquarters in Winston, NC. Additional services will be provided by consultants from their home locations in the United States.

ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION

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

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

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

a) Is Vendor a Historically Underutilized Business? Yes No

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

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

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

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

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

The Vendor, Hagerty Consulting, Inc., 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

Katie Freeman, Director of Operations
Name and Title of Vendor's Authorized Official

September 10, 2025
Date

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

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

ATTACHMENT H: EXPERIENCE

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

Example 1	
Client Name:	Nebraska Department of Economic Development
Program:	CDBG-DR Program for Inter Storm Ulmer
Brief Description of Services Rendered:	The State of Nebraska's Department of Economic Development procured Hagerty to support grant administration and implementation of their CDBG-DR Program for Inter Storm Ulmer which unleashed extensive flooding across the State. D D was awarded \$10 . million in CDBG-DR funding to support long-term recovery primarily because of significant infrastructure damage attributable to Ulmer.

Example 2	
Client Name:	Manatee County, Florida
Program:	Grant Writing Program Administration
Brief Description of Services Rendered:	After receiving \$252.7 million in CDBG-DR funds for recovery from Hurricanes Debby, Helene, and Milton, Manatee County engaged Hagerty to conduct an Unmet Needs Assessment, develop its HUD-approved Action Plan and Administrative Action Plan, complete required financial certifications, and design a robust public engagement process with more than 20 local stakeholders. Hagerty continues to provide program design, training, and technical assistance, positioning the County to implement its recovery programs effectively while building long-term capacity for compliance and locally driven recovery.

Example 3	
Client Name:	Bay County, Florida
Program:	Bay County Disaster Recovery Consulting Services
Brief Description of Services Rendered:	After receiving \$36 million in HHRP funds for Hurricane Michael recovery, Bay County requested support from Hagerty to conduct a housing unmet needs assessment, develop a local Housing Assistance Plan, design and implement recovery programs, and train newly hired County Housing Division staff. Hagerty's program design and implementation support led to consecutive state-wide awards from the Florida Housing Coalition recognizing Bay County's ReHouse Bay Program for Outstanding Disaster Recovery Assistance 2022 and Success with Helping Households Overcome Substantial Obstacles to Homeownership 2023 .

Example 4	
Client Name:	City of Panama City, Florida
Program:	City of Panama City Disaster Recovery Services
Brief Description of Services Rendered:	As a result to damage caused by Hurricane Michael, Hagerty supported the City of Panama City with its recovery, including securing and managing \$136 million in CDBG-DR funding and an additional \$214 million via other federal and state funding sources. The funding supported replacing underground infrastructure, improving exterior business facades throughout five of the City's historic business districts, and implementing a home buyout program.

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.



BID ADDENDUM

August 26, 2025

FAILURE TO RETURN THIS ADDENDUM MAY SUBJECT YOUR BID TO REJECTION

Solicitation Number	Doc1677946894
Solicitation Description	Staff Augmentation
Addendum Number	1

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

CHANGE TO SOLICITATION:

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

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

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

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

RESPONSE TO QUESTIONS:

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

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

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

	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.

Addendum 1_Staff Augmentation

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.

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

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.

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

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)

Addendum 1_Staff Augmentation

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.

Addendum 1_Staff Augmentation

		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

Addendum 1_Staff Augmentation

	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

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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.

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

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.

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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,

Addendum 1_Staff Augmentation

	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.

Addendum 1_Staff Augmentation

			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

Addendum 1_Staff Augmentation

		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

Addendum 1_Staff Augmentation

		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.

Addendum 1_Staff Augmentation

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

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: Hagerty Consulting, Inc.

AUTHORIZED SIGNATURE: [Redacted Signature]

NAME and TITLE (Print or Typed): Katie Freeman, Director of Operations

DATE: September 10, 2025



BID ADDENDUM #2

September 8, 2025

THIS ADDENDUM DOES NOT NEED TO BE RETURNED.

Solicitation Number	Doc1677946894
Solicitation Description	Staff Augmentation
Addendum Number	2

Solicitation Opening remains **September 11, 2025.**

Submit proposals **BEFORE 2:00 pm ET (by 1:59:59).**

CLARIFICATION:

1. The electronic Vendor Portal (eVP) will indicate there are three addendums when this addendum (Addendum #2) is posted to eVP. There are only two (2) addendums. Addendum #1 is questions and answers. Addendum #2 is this addendum. When the solicitation opening date was changed from September 4, 2025, to September 11, 2025, the system indicates this date change as an addendum.

The below is intended to clarify the information in eVP.

Addenda

Created On ↑	Name	Addendum / Change Description
8/26/2025 7:07 PM	Staff Augmentation; CDBG-DR Addendum - 1 Questions & Answers	This solicitation has been modified in Ariba and posted as an addendum. Please log in to Ariba and review for any updates.
8/26/2025 7:10 PM	Staff Augmentation; CDBG-DR Addendum - 2 Bid Opening Extended	This solicitation has been modified in Ariba and posted as an addendum. Please log in to Ariba and review for any updates.

ADDENDUM - 3 THIS ADDENDUM.

- 2. The state inadvertently did not include a question in Addendum #1 that was submitted by the due date/time of August 18, 2025, by 5:00 pm ET. The Question appears exactly as submitted by the Vendor.

Question #	CITATION	VENDOR QUESTION	DCR RESPONSE
208	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, DCR will not allow conflicts of interest, so the firms assisting municipalities may not be able to receive task orders for certain projects.

Vendor Name: Hagerty Consulting, Inc.

Printed Name and Title: Katie Freeman, Director of Operations

Date: September 10, 2025

Authorized Signature:



3. Table of Contents

- 1. Title Page i**
- 2. Signed Execution Pages and Signed Addenda 1**
- 3. Table of Contents 101**
- 4. Narrative Response: Vendor Qualifications and Approach 102**
 - Hagerty’s History: A Focus on Disaster Response and Recovery 105
 - Our Experience with HUD-Funded Programs 106
 - Our Experience Aligned to the State’s Needs 115
 - Our Informed Approach to Fulfilling Task Orders 145
 - Quality Assurance, Regulatory Compliance, and Oversight 147
 - Our Capacity to Support the State 150
 - Our Personnel Capabilities Align to the State’s Needs 152
- 5. Resumes and Bios 154**
- 6. Examples 363**
- Financial Documentation 367**
- Attachment A: Task Order Categories/Pricing 392**
- Attachment D: Location of Workers Utilized by the Vendor 400**
- Attachment E: HUB Supplemental Vendor Information 402**
- Signed Attachment F: Certification for Contracts, Grants, Loans, and Cooperative Agreements. 404**
- Signed Attachment G: Disclosure of Lobbying Activities (OMB Standard Form LLL) 406**
- Redacted Version of the Proposal 409**
- List of Errata and Exceptions 410**

4. Narrative Response: Vendor Qualifications and Approach

Hagerty Consulting (Hagerty) offers the North Carolina Department of Commerce, Division of Community Revitalization (DCR), a trusted partner with exceptional experience, proven performance, and a broad footprint in the State’s recovery from Hurricane Helene. No firm has been more closely engaged in North Carolina’s Community Development Block Grant – Disaster Recovery (CDBG-DR) efforts, from boots on the ground during immediate response, to authoring the United States (US) Department of Housing and Urban Development (HUD)-approved Action Plan, to ongoing support for policies and procedures that will guide long-term recovery. We understand the Governor Stein’s directive to move CDBG-DR funds quickly and effectively, and we are prepared to help DCR push implementation forward in contrast to prior disaster recovery efforts in the State – achieving early, visible wins and sustainable progress.

Footprint in the State’s Recovery

Hagerty’s work in North Carolina reflects our long-standing commitment to the State’s recovery efforts. Over multiple disasters, we have partnered with State and local officials to provide technical expertise, operational support, and long-term program implementation, building trust and demonstrating results.

Following Hurricane Matthew in 2018, Hagerty was engaged by the State of North Carolina to provide CDBG-DR subject matter expertise and technical assistance for the operation of four Program Intake Centers. Our staff supported intake operations that helped streamline applicant processing and ensured the State could efficiently deliver assistance to impacted households. In the same year, after Hurricane Florence, Hagerty analyzed Federal Emergency Management Agency (FEMA) Individual Assistance (IA) data to map housing damage across the State, categorize impacts by owner/renter and HUD damage classifications, and overlay results with low- and moderate-income (LMI) areas. We also provided a summary of the *Disaster Recovery Reform Act* (DRRA) and identified potential policy changes to guide North Carolina’s funding request. Together, these efforts gave the State actionable insights and technical support to position its CDBG-DR programs for success.

When Helene struck, Hagerty deployed professionals across the State, embedding at the State Emergency Operations Center (SEOC), the Joint Field Office (JFO), and other field locations such as the Durham Joint Information Center and Temporary Debris Resource Sites. From the arrival of personnel on October 3, 2024, Hagerty adapted our footprint and functional roles to meet North Carolina Emergency Management’s (NCEM) evolving needs. Early response efforts included:

- » Isolated Communities Task Force – form development, data tracking, interagency coordination, and reporting.
- » Water/Wastewater Task Force – infrastructure tracking, agenda development, facilitation, and reporting.
- » Feeding Task Force – template development, notetaking, and action item coordination.

- » Debris Task Force – subject-matter expertise, tracker development and management, interagency coordination.
- » Elections Task Force – planning, stakeholder coordination, and facilitation.
- » Emergency Management Assistance Compact (EMAC) – standard operating procedure (SOP) development, reconciliation, tracking, and response coordination.

As operations transitioned to recovery, Hagerty developed the Hurricane Helene Executive Summary and County Profile Reports in support of NCEM’s work with the Governor’s transition team. Staff then shifted to debris management coordination, external affairs support, and interagency facilitation for the Private Roads and Bridges Task Force. Public Information Officers (PIOs) finalized the State’s Joint Information Center/Joint Information System Plan while continuing to guide NCEM’s external communications priorities.

At the same time, Hagerty partnered with DCR to rapidly develop and co-author the CDBG-DR Action Plan submitted under HUD’s 2025 Revised Universal Notice, approved by HUD on first submission. Consistent with Governor Stein’s directives, this positioned North Carolina to move quickly into program launch, with Hagerty continuing to support DCR through financial certifications and development of Multifamily Housing Program Policies and Procedures.

Our local-level work further demonstrates our footprint in the State of North Carolina. Since early 2025, Hagerty has been embedded with the City of Asheville’s Community and Economic Development Department, drafting the City’s CDBG-DR Action Plan, preparing financial certifications, developing policies and procedures, and coordinating with HUD. Prior to HUD’s allocation, Hagerty advised Asheville’s Housing Recovery Support Group, helping the City evaluate short- and long-term recovery options. These efforts allowed Asheville to “hit the ground running” once CDBG-DR resources became available. We continue to assist the City strategically layer FEMA Public Assistance (PA), Hazard Mitigation Grant Program (HMGP), and CDBG-DR funds to maximize reimbursement and reduce the burden on local taxpayers.

Through this dual role, boots-on-the-ground immediate response with NCEM and embedded long-term recovery support with DCR and Asheville, Hagerty has become a critical partner in ensuring continuity, compliance, and accelerated recovery for North Carolina’s communities.

Transition from Planning to Implementation

Building on our extensive role in North Carolina’s recovery, Hagerty offers DCR a partner that ensures a seamless transition from planning to implementation. Because our team authored the State’s HUD-approved CDBG-DR Action Plan and developed the Multifamily Housing Program Policies and Procedures, we bring forward the same senior experts to lead program launch and task order execution. This continuity preserves institutional knowledge, accelerates timelines, and reduces the burden on DCR staff to re-train or re-orient new contractors.

Our approach is rooted in operational efficiency and compliance assurance. By combining technical expertise in HUD requirements with direct experience in North Carolina’s recovery landscape, Hagerty enables DCR to move quickly from design to delivery, without sacrificing accountability or community impact. This proven

approach has allowed us to help clients nationwide stand-up programs in record time, while meeting all HUD requirements and local priorities.

Regarding federal requirements, Hagerty will work to provide DCR with the most current guidance on the applicability of those requirements in a shifting regulatory and compliance environment. Various executive orders issued since January 2025 have impacted long standing interpretations of regulations on issues such as environmental review, floodplain management, fair housing, civil rights, addressing limited English proficiency, provision of assistance to undocumented individuals, and a host of other areas. Further, guidance materials available from HUD have been trimmed back and HUD has experienced staff reductions that often make it difficult to obtain timely responses to policy questions. In this environment, the CDBG-DR policy expertise of the Hagerty team will be invaluable to DCR as it navigates this new landscape.

Nationally Recognized Technical Experts and Scalable Staffing

Hagerty brings together a comprehensive team of nationally recognized practitioners whose collective experience spans the full spectrum of disaster recovery, mitigation, and federal grant management. This depth of expertise ensures that DCR will have access to proven leaders who can both chart the strategic course and execute at the ground level to accelerate recovery, maintain compliance, and maximize impact. The career accomplishments of the Hagerty team are outlined below.

The Qualifications of the Hagerty Team

Hagerty Staff	Career Accomplishments
Stan Gimont	Former HUD Deputy Assistant Secretary for Grant Programs, whose deep knowledge of CDBG-DR policy and compliance provides DCR with direct insight into HUD’s expectations and practices.
Brock Long	Former FEMA Administrator bringing unparalleled expertise in federal disaster recovery, large-scale program oversight, and grant management. His leadership perspective ensures that DCR benefits from lessons learned across FEMA and HUD recovery programs nationwide.
David Bennett	A seasoned CDBG-DR implementer with extensive program design and operational leadership experience in multiple states, currently supporting North Carolina’s recovery.
John Hageman	A financial and grants management leader with extensive experience in compliance, fiscal accountability, and oversight of large federal funding portfolios. His expertise provides DCR with the assurance that financial controls, monitoring, and reporting will meet the highest standards of integrity and transparency.
Amelia Muccio	A nationally respected expert in mitigation, resilience, and grant management who has guided states and local governments in aligning recovery investments with long-term risk reduction. Her experience ensures DCR can integrate resilience into CDBG-DR programs, advancing North Carolina’s long-term recovery and sustainability goals.
Jessi Widhalm	Former FEMA Director of External Affairs and strategic communications leader with over a decade of experience in stakeholder engagement and external affairs.

Together, this diverse cadre of subject matter leaders equips Hagerty with the ability to support DCR in every dimension of its CDBG-DR mission, from policy interpretation and program design to financial stewardship, to on-the-ground execution and monitoring.

Benefits to DCR and North Carolina’s CDBG-DR Efforts

Our approach to staffing directly benefits DCR and the people of North Carolina by:

- » **Accelerating program launch and delivery:** leveraging prior experience and existing tools/templates to minimize startup delays.
- » **Reducing compliance risk:** embedding HUD’s Community Planning and Development (CPD) Monitoring Handbook standards from the outset to prepare HUD-ready files.
- » **Maximizing impact of recovery dollars:** aligning investments with resilience, mitigation, and long-term community revitalization.
- » **Ensuring fiscal accountability:** applying proven financial controls and transparent reporting to safeguard public trust.

A flexible and scalable staffing model.

Our staffing model is intentionally designed to be both flexible and cost-conscious: we scale resources up or down according to the demands of each task order. This ensures DCR pays only for the expertise it needs, while always having access to the right professional, at the right time. Hagerty deploys experts both onsite and remotely, balancing efficiency with strong local presence.

Hagerty’s unique combination of North Carolina-specific experience, leading the Helene Action Plan, supporting DCR with Multifamily Policies and Procedures, embedding in Asheville, and partnering with NCEM on immediate response, paired with our national record of delivering CDBG-DR Programs, positions us to guide DCR through a seamless, compliant, and effective implementation.

Hagerty’s History: A Focus on Disaster Response and Recovery

With more than **23 years of experience** dedicated solely to emergency management and disaster recovery, Hagerty has successfully supported state and local governments across the country through more than **70 Presidentially Declared Disasters**, administering over **\$95 billion in federal recovery funding**. Our team brings policy fluency, operational agility, and on-the-ground insight needed to deliver results, from program launch through closeout.

Founded in 2001, Hagerty has developed significant experience supporting our client’s recovery operations after catastrophic loss. Hagerty has led and managed the development, administration, and closeout of thousands of federal recovery grants and programs. Hagerty has experience supporting all types of clients, recoveries, and federal funding programs including the HUD CDBG-DR and CDBG-MIT (Mitigation); FEMA PA Program; FEMA 404 HMGP; FEMA Individual Assistance (IA); Federal Highway Administration (FHWA) Emergency Relief (ER) Program; and the Federal Transit Administration (FTA)-ER Program.

Hagerty's Expertise has been Leveraged to Meet Client Needs Specific to Various Disasters

\$69+ Billion

Federal Emergency Management Agency
Public Assistance Program

\$14+ Billion

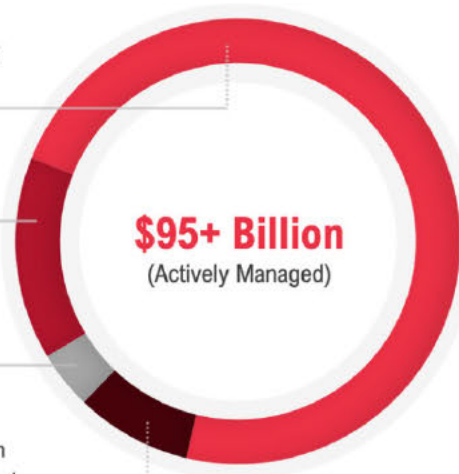
American Rescue Plan Act Programs

\$4+ Billion

Coronavirus Aid, Relief, and
Economic Security Act Programs

\$8+ Billion

Other Federal Grants, including Mitigation
Grants and US Department of Housing and
Urban Development Grants



20+ TOTAL YEARS

of Experience in Disaster
Recovery Grant Program
Management

27 STATES & TERRITORIES

Where Hagerty is Providing
Support for Management of
Federal Recovery Funds

What sets Hagerty apart is our singular focus: **disaster recovery and grants management is not just part of what we do, it is all we do.** We are not a firm with competing priorities; we are fully dedicated to assisting governments navigate the most complex moments they face. As a committed partner to DCR, we bring a deep understanding of what it takes to implement CDBG-DR Programs in alignment with DCR's needs.

Our Experience with HUD-Funded Programs

Following a major federally declared disaster, such as a hurricane or severe flooding, a State may be awarded CDBG-DR funding to support initial to long-term recovery. CDBG-DR funds may be used in conjunction with annual allocation HUD programs and other housing program dollars to leverage and support more immediate and emergent housing, economic revitalization, infrastructure and other eligible needs in the aftermath of an event. Hagerty has worked with grantees to re-program the different HUD formula program funding to serve as a short-term solution until CDBG-DR dollars are made available.

The CDBG-DR Program can provide significant flexible funding to address unmet needs in housing, infrastructure, economic revitalization, and mitigation; however, each CDBG-DR allocation is governed by unique requirements, waivers, and constraints issued through allocation and program requirements notices published in the Federal Register. These constraints can vary by disaster, and they influence program-specific requirements, National Objectives, eligible activities, timelines, environmental review standards, and duplication of benefit (DOB) requirements, among others.

As the HUD grantee, DCR plays a central role in administering, coordinating, and aligning federal resources to maximize recovery outcomes. DCR may directly implement these programs or partner with local governments, housing authorities, and nonprofit organizations to ensure funds are delivered where they are most needed. In this role, DCR is responsible for ensuring compliance with HUD requirements, maintaining

equity in program delivery, and leveraging multiple funding streams to address unmet housing, infrastructure, and community development needs.

Hagerty staff bring hands-on expertise across a wide range of HUD-funded programs. This breadth of experience not only demonstrates our direct capability to support North Carolina across multiple HUD programs but also highlights the opportunity for DCR to strategically layer these resources. The table below outlines HUD programs that DCR may utilize independently or in coordination with regional and local partners to implement post-disaster recovery efforts.

HUD and Community Development Programs that may be used to augment Disaster Recovery

Program	Description	Post-Disaster Use
Community Development Block Grant - Disaster Recovery	Provides flexible funding to States for long-term disaster recovery from presidentially declared disasters. Supports housing, infrastructure, economic revitalization, and mitigation activities.	Enables the State to design and implement recovery programs, either directly or through local subrecipients, to restore housing, repair critical infrastructure, support economic recovery, and build resilience in disaster-impacted areas.
CDBG-DR Mitigation Set-Aside	Allocates a portion of CDBG-DR funds to reduce future risks and increase resilience to disasters. Administered by the State in accordance with HUD's Notice requirements.	Allows the State to fund planning and capital projects that reduce risk and enhance resilience, including infrastructure hardening, flood control, and community-wide resilience initiatives.
Community Development Block Grant Entitlement / State Program	Provides formula funding annually to States (for non-entitlement areas) and to entitlement jurisdictions to support housing, infrastructure, economic development, and public services.	May be reallocated or reprogrammed to address urgent recovery needs, including housing rehabilitation, infrastructure repair, or economic revitalization. The State can coordinate with entitlement jurisdictions to align post-disaster funding priorities.
Section 108 Loan Guarantee	Provides loan guarantee authority allowing States and local governments to exponentially leverage formula based annual CDBG funds for large-scale projects by borrowing against future allocations.	May be reallocated or reprogrammed to address urgent recovery needs, including housing rehabilitation, infrastructure, or economic revitalization. The State can coordinate with entitlement jurisdictions to align post-disaster priorities.
Emergency Solutions Grant	Provides formula funding to States and local governments to support homelessness prevention, emergency shelter, rapid rehousing, and related services.	Enables the State to assist with emergency sheltering, homelessness prevention, and rapid rehousing following disasters, particularly for displaced or at-risk households.

Program	Description	Post-Disaster Use
HOME Investment Partnerships Program	Provides formula funding to States and local participating jurisdictions to expand the supply of affordable housing for low-income households.	Supports the development and rehabilitation of affordable housing, including replacing units lost in disasters. The State can use HOME to assist displaced renters through new construction or rehabilitation projects.
Housing Trust Fund	Provides block grant funding to States to increase and preserve the supply of affordable rental housing, primarily for extremely low- and very low-income households.	Enables the State to finance deeply affordable housing to meet post-disaster needs, particularly for households most impacted and least able to recover.
Project-Based Assistance (Section 8)	Provides rental subsidies for affordable multifamily housing developments through long-term contracts.	Offers rental assistance to low-income households impacted by disasters. The State may coordinate with HUD and local PHAs to rehouse displaced residents.
Section 811 (Supportive Housing for Persons with Disabilities)	Provides funding for affordable housing with supportive services for very low-income adults with disabilities.	Allows the State to expand supportive housing opportunities for persons with disabilities who may have been displaced or lost housing during a disaster.
Section 202 (Supportive Housing for the Elderly)	Provides capital advances and operating subsidies to expand affordable housing with supportive services for very low-income elderly households.	Supports creation or repair of affordable housing for elderly residents affected by disasters, reducing displacement risks for vulnerable seniors.
Section 236 / 221(d)(3) Below Market Interest Rate	Provides mortgage subsidies to encourage private developers to construct affordable rental housing.	Preserves affordability in multifamily housing developments that may be at risk post-disaster. CDBG-DR can be layered with these subsidies to support long-term affordability.
Public Housing	Provides capital and operating funds for local public housing authorities (PHAs) to maintain affordable housing.	Enables the State to coordinate with PHAs to repair or replace damaged public housing units and provide interim housing for displaced residents.
Family Homeownership Programs (Section 184, FHA, etc.)	Federal mortgage programs designed to help low-income families, Native American tribes, and first-time buyers purchase affordable housing.	Facilitates home repair loans or purchase through mortgage products for disaster-impacted households. The State may promote these programs as part of recovery.
Housing Opportunities for Persons with AIDS	Provides housing assistance and supportive services for low-income persons living with HIV/AIDS and their families.	Ensures housing stability and supportive care for individuals with HIV/AIDS whose housing has been disrupted by a disaster.

Program	Description	Post-Disaster Use
Lead Hazard Reduction and Healthy Homes	Provides grants to States and local governments to reduce lead-based paint and housing-related health hazards.	Supports safe housing rehabilitation in disaster-damaged homes, ensuring that repairs address environmental hazards alongside structural needs.
Continuum of Care	Provides competitive grant funding to support homelessness services and permanent housing solutions.	Enables the State to coordinate with Continuum of Care (CoC) providers to expand housing options for disaster survivors experiencing homelessness or displacement.
Choice Neighborhoods Initiative	Provides funding to transform distressed neighborhoods into sustainable, mixed-income communities.	Allows the State to coordinate long-term redevelopment strategies for neighborhoods significantly impacted by disaster, including housing and infrastructure revitalization.

Together, these HUD resources provide DCR with a robust toolkit for disaster recovery, supporting housing stabilization, infrastructure restoration, and long-term rebuilding. When strategically layered, these programs can address non-federal match obligations, fill funding gaps, and exponentially extend the impact of the core CDBG-DR investment. However, each funding stream carries specific statutory and regulatory requirements that may overlap or conflict in terms and conditions of use. Given its unique nature, CDBG-DR funding must be implemented in accordance with HUD’s disaster-specific guidance. To fully leverage this toolkit, DCR will benefit from Hagerty’s technical expertise and operational support to ensure compliance, expedite program delivery, and align funding streams with North Carolina’s recovery and resilience goals.

A Trusted Partner in CDBG-DR

Hagerty has diverse experience in assisting disaster-impacted communities eligible to receive CDBG-DR funds for long-term recovery needs following a major disaster. Our experience includes supporting jurisdictions to receive direct allocations of funding, crafting robust Unmet Needs Assessments (UNAs) to position local subrecipients for optimal recovery funding, and supporting direct recipients of CDBG-DR funds with the development of Action Plans and subsequent implementation support. We offer DCR the right professionals across all program phases, through implementation and closeout.

Our work spans various states and disaster types, including engagements in North Carolina, Florida, Nebraska, Pennsylvania, California, Louisiana, Texas, Alabama, Missouri, and beyond. Hagerty has built its reputation on helping governments unlock the full potential of federal recovery and resilience funding. We bring a deep understanding of HUD and related federal programs, combined with a proven ability to design and implement programs that not only meet regulatory requirements but also align with local priorities and long-term community goals.

Value of All Hagerty Supported CDBG-DR Projects:

\$7.63B

Below are examples of relevant experience that demonstrates Hagerty’s capability to deliver CDBG-DR planning, implementation, and compliance services for clients with complex recovery needs.

STATE OF NEBRASKA DEPARTMENT OF ECONOMIC DEVELOPMENT CDBG-DR SUPPORT

The State of Nebraska’s Department of Economic Development (DED) procured Hagerty to support grant administration and implementation of their CDBG-DR Program for Winter Storm Ulmer which unleashed extensive flooding across the State. DED was awarded \$108.9 million in CDBG-DR funding to support long-term recovery primarily because of significant infrastructure damage attributable to Ulmer.



Hagerty is supporting DED on grant strategy and implementation, grant management support, monitoring and compliance, technical assistance, and research/analysis. DED, with Hagerty’s assistance, successfully obtained HUDs approval of their Action Plan that reflected a two thirds allocation for infrastructure purposes, as opposed to primary housing emphasis. Based upon the UNA prepared by Hagerty, DED opted to implement an Infrastructure Match Program (\$43.6 million) for both the FEMA PA and HMGP, Affordable Housing Construction Program (\$56.5 million), and two Planning Programs (\$3 million). **To assist DED in the implementation of the CDBG-DR Programs, Hagerty prepared programmatic documentation including, but not limited to policies and procedures; SOPs; program applications; environmental assessments; and both substantial and non-substantial Action Plan Amendments.**

Key Personnel Assigned to this Project Who Will Also Support DCR

- » **Stan Gimont served as a Senior Subject Matter Expert** and provided expertise to the development of Nebraska’s CDBG-DR Action Plan.
- » **Laura Munafo served as the Deputy Project Manager and Infrastructure Lead**, providing project management support and subject matter expertise for CDBG-DR and infrastructure implementation guidance to the State.
- » **Ashley Napier served as the Housing and Planning Lead** where she helped design programs based on allocated funding from the CDBG-DR grant, launched and initiated technical assistance and capacity building training, and delivered strategic approaches to improve upon implemented activities.

ST. LOUIS COUNTY, MISSOURI CDBG-DR UNA AND ACTION PLAN DEVELOPMENT

In July 2022, St. Louis County, Missouri, experienced unprecedented rainfall, leading to catastrophic flooding that caused widespread damage to homes, infrastructure, and essential services. In response, HUD awarded the County \$56,425,000 in CDBG-DR funding. Hagerty is assisting the County in their recovery by developing their CDBG-DR UNA and Action Plan. With extensive experience in disaster recovery and CDBG-DR requirements, Hagerty actively works with County officials and community stakeholders to create a data-driven recovery framework that will guide St. Louis County’s recovery efforts.



This included a robust public engagement effort with over 88 municipalities, special districts, and stakeholders to ensure broad input and alignment with local recovery needs.

In addition to developing the UNA and Action Plan, Hagerty’s role extends to supporting St. Louis County’s long-term recovery capacity. Hagerty provides training and technical assistance to County staff, helping them navigate the complexities of CDBG-DR funding and HUD compliance requirements. By building local expertise, Hagerty works to empower St. Louis County to manage ongoing recovery efforts independently and strengthened its resilience to future disasters.

Key Personnel Assigned to this Project Who Will Also Support DCR

- » **Stan Gimont served as a Senior Advisor**, where he advised the County and supports staff with the development of the UNA and Action Plan and provides strategic guidance on HUD requirements and policy issues.
- » **David Bennett served as Project Executive** and oversaw overall project delivery and successful execution of the scope of work.
- » **Laura Munafo served as the Project Manager**, providing daily guidance to the County and project staff ensuring CDBG-DR compliance and incorporating the industry’s best practices.
- » **Ashley Napier, CDBG-DR Support Staff**, supported the development of the UNA and Action Plan and collaborated with the County on potential housing and infrastructure programs.
- » **Chris Delgado, CDBG-DR Support Staff**, supported the development of the Financial Certifications for the submission to HUD.
- » **Phil Betito, CDBG-DR Support Staff**, supported the development of the UNA and Action Plan; with a primary focus on the economic revitalization needs of the County.

MOBILE COUNTY, ALABAMA CDBG-DR UNA AND LOCAL RECOVERY PLAN

Hagerty was engaged by Mobile County, Alabama, in 2024 to support the implementation of over \$27 million in CDBG-DR funding, awarded through the Alabama Department of Economic and Community Affairs (ADECA) in response to Hurricanes Sally and Zeta, which significantly impacted the Gulf Coast in late 2020.



Hagerty’s support included the development of the UNA, Local Recovery Plan (LRP), program and project design documents, and a comprehensive CDBG-DR implementation manual. To ensure programs reflected community priorities, Mobile County hosted multiple outreach events, with Hagerty leading all aspects of community engagement and public input. Hagerty also facilitated strategy sessions with County leadership to analyze needs, prioritize investments, and design impactful, fundable recovery programs and projects.

Hagerty provided end-to-end program design services, including the creation of detailed policies and procedures for housing and infrastructure recovery programs. This included eligibility criteria, application workflows, DOB protocols, and compliance measures to align with HUD requirements. Hagerty worked

closely with County departments to build internal capacity and ensure readiness for program launch and long-term implementation.

Key Personnel Assigned to this Project Who Will Also Support DCR

- » **Stan Gimont served as a Senior Advisor** who advised the County and support staff of the development of the LRP and provided strategic guidance on HUD requirements and policy issues.
- » **Laura Munafò served as the Project Manager**, providing daily guidance to the County and project staff ensuring CDBG-DR compliance and incorporating industry best practices.
- » **Ashley Napier, CDBG-DR Support Staff**, supported the development of the UNA and LRP; collaborated with the client on program and project development and documentation needs.
- » **Julia Zachgo, CDBG-DR Support Staff**, conducted research for the development of the UNA and LRP; developed documentation visuals and maps.

CITY OF PANAMA CITY DISASTER RECOVERY CONSULTANT SERVICES

Hagerty has been a close partner on the City of Panama City's road to recovery from Hurricane Michael which struck in 2018. The hurricane was the third-strongest hurricane to make landfall in the US, and the second strongest hurricane to hit the continental US. In six short hours, the Category 5 storm damaged or destroyed 98 percent of the City's infrastructure. More than 5.7 million cubic yards of debris covered City streets, costing the City \$94.6 million to remove.



In December 2018, the City selected Hagerty for disaster recovery services. These services include the development, management, and reimbursement of federal and state grants including FEMA PA, Hazard Mitigation 404 and 406, CDBG-DR, Flood Mitigation Assistance (FMA), Building Resilient Infrastructure and Communities (BRIC), Resilient Florida, and State Revolving Fund. In 2019, the City expanded their contract, asking Hagerty to provide experts in long-term recovery planning, economic development planning, UNA, and housing recovery. **Today, with the help of Hagerty, the City has successfully secured nearly \$350 million in disaster grant funding to rebuild a stronger and more resilient community.**

Hagerty's disaster recovery experts continue to be an instrumental part of assisting the City with disaster recovery. Since December 2018, Hagerty has led the City to achieve the following outcomes:

- » Securing approximately **\$100 million** in CDBG-DR funding to replace underground infrastructure and improve exterior business facades throughout five of the City's historic business districts.
- » Supporting the City to become the single largest recipient of CDBG-DR home buyout funding, receiving **\$5 million** to purchase more than a dozen repetitive flood homes.
- » Identifying and correcting nearly **\$10 million** in errors and missing eligible work within FEMA produced cost estimates.

- » Supporting the City to ensure the State of Florida covers the City’s 12.5-percent cost share on all FEMA PA projects, saving the City nearly **\$20 million**.
- » Ensuring the reimbursement by FEMA of **98 percent** of the City’s debris removal cost.
- » Structuring recovery programs such that FEMA and CDBG-DR are paying 100 percent of the \$63.5 million requested by the City to make critical infrastructure more resilient.

Key Personnel Assigned to this Project Who Will Also Support DCR

- » **Nathan Beam who served as Project Manager**, providing day-to-day project management and direct client support for infrastructure recovery projects. Led the coordination and execution of public infrastructure improvements, developed funding submissions to FloridaCommerce and federal agencies, and ensured alignment with City priorities.
- » **Ashley Napier, Recovery Consultant**, supported the preparation and submission of housing-related recovery project applications to FloridaCommerce. Delivered training and technical support on key federal compliance topics, including *Davis-Bacon Act* and *Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA)* requirements, helping ensure regulatory compliance and successful project implementation.

CITY OF SANTA ROSA, CALIFORNIA CDBG-DR PROGRAM SUPPORT

Hagerty was awarded a contract to support the City of Santa Rosa in preparing for and implementing a CDBG-DR Program in relation to the State of California’s \$162 million CDBG-DR allocation, and \$88 million CDBG-MIT allocation that addressed damage associated with 2017 wildfires. The City, with Hagerty’s assistance, successfully persuaded the State to incorporate into its Action Plan the ability for the City to be a subrecipient under the Multi-Family Home Program and be responsible for implementing a \$38 million program with CDBG-DR funds. In addition, the City was a subrecipient under California’s FEMA PA Infrastructure Match Program, where along with Sonoma County, the City applied for and received \$1.2 million in CDBG-DR funds.



In August of 2022, Hagerty secured for the City three distinct and separate CDBG-DR/MIT awards totaling \$33.9 million. One of those awards was \$16.9 million to rebuild Fire Station #5 - the fire station that was completely destroyed in the Tubbs Fire. **When we were awarded our contract, the City communicated that the Fire Station was the City’s top recovery priority and challenged us to help them.** Hagerty was successful in securing the necessary funding under the CDBG-DR Program, allowing the City to fund the Fire Station entirely with recovery funds. Over time, Hagerty supported the City to secure **\$70 million in recovery funding**; Hagerty’s contract costs were **less than one percent** of this value.

Hagerty coordinated with the City on grant strategy and implementation, grant management support, monitoring and compliance, and research/analysis. Upon contract award and in anticipation of the State’s

Action Plan, Hagerty conducted a UNA to identify the City’s unmet needs across CDBG-DR eligible areas: housing, infrastructure, and small business. **In that analysis, the Hagerty team identified over \$350 million in unmet needs resulting from the Tubbs Fire.** The focus on the analysis was a discrepancy identified between FEMA reported damaged housing through the IA Program data, and the data collected by local officials. Analyzing this information, the Hagerty team found that over 3,952 homes were damaged by the fire based upon HUDs damage criteria while only 1,061 were identified by FEMA as having major to severe damage. This discrepancy was brought to HUD officials for further consideration in a secondary allocation.

Key Personnel Assigned to this Project Who Will Also Support DCR

- » **Stan Gimont who served as a Subject Matter Expert**, providing subject matter expertise to Santa Rosa’s UNA and Action Plan development, CDBG-DR implementation and reporting, and provided assistance with other State and federal grant opportunities.
- » **Laura Munafo who was the Project Manager**, providing day-to-day implementation oversight for the City of Santa Rosa’s disaster recovery programs, modeled on CDBG-DR standards, including the development of detailed policies and procedures, application materials, and program workflows.

Time and again, states and communities have trusted Hagerty to deliver CDBG-DR Programs that are compliant, efficient, and impactful. The projects below showcase the breadth of our expertise and the results we have achieved alongside our clients. Hagerty has Served as a Trusted Partner for CDBG-DR Program Implementation



NYC Post-Hurricane Sandy: Multi-family housing recovery, infrastructure planning, and financial system development (**\$4 billion**)



State of Nebraska Post-2019 Floods: Long-term recovery planning, housing strategy development, and infrastructure scoping (**\$108 million**)



City of Panama City Post-Hurricane Michael: Home buyout, infrastructure recovery, economic revitalization, hazard mitigation, and FEMA grant local match (**\$136 million**).



City of Santa Rosa, California Post-Tubbs Fire: Three CDBG-DR/MIT grants including the full relocation and replacement of a firehouse destroyed by wildfire (**\$34 million**).



New Orleans Post-Katrina Recovery: Financial tracking and program support for more than 100 infrastructure and housing projects (**\$1.5 billion**)



State of North Carolina ReBuild NC for Hurricane Matthew: Housing rehabilitation, reconstruction, relocation, and mitigation assistance (**\$778 million**)

These projects demonstrate our ability to manage CDBG-DR Programs of size and complexity similar to those reflected in North Carolina’s Action Plan while customizing implementation to meet the priorities and unique conditions of each jurisdiction.

Our Experience Aligned to the State’s Needs

Hagerty is presenting a structured response for each of the tasks we are submitting under this solicitation – **Tasks 1, 2, 3, 4, 5, 6, 7, 8, 10, 12, 14, and 15**. For every task, we have organized our narrative to align with the evaluation criteria outlined in the State’s request for proposals, demonstrating our relevant experience, our proposed technical approach, and our staffing plan. Together, these sections highlight Hagerty’s proven capability to deliver CDBG-DR planning, implementation, and compliance services across the full range of program needs identified by DCR.

TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures

Experience

Hagerty has extensive experience developing, updating, and maintaining policies and procedures that support compliant, consistent administration of CDBG-DR Programs. Our approach goes beyond aligning with HUD requirements as we proactively anticipate HUD and Office of Inspector General (OIG) monitoring questions based on HUD’s monitoring practices as reflected in the CPD Monitoring Handbook ([HUD Handbook 6509.2](#)). Further, we integrate from the outset lessons learned from previous recoveries to ensure programs are designed to withstand federal review.

In North Carolina, Hagerty has been entrusted with drafting policies and procedures for multifamily rental housing construction, rehabilitation, and mitigation programs. This effort has been conducted in full compliance with HUD’s 2025 Revised Universal Notice. Hagerty has supported numerous other clients with the development of policies, procedures, and SOPs, as detailed below.

Client	Past Performance
Florida (Hurricanes Irma and Michael)	Housing and infrastructure program policies authored by Hagerty passed HUD monitoring with no findings, demonstrating proactive risk mitigation.
Nebraska (2019 Flooding)	Housing and infrastructure recovery policies, integrating resilience and compliance measures to address both immediate disaster recovery needs and long-term mitigation.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Housing, infrastructure, and construction standard policies and procedures to ensure compliance with HUD’s Revised Universal Notice while aligning with County-specific ordinances and recovery priorities (currently in development).

Client	Past Performance
Other State and Local Clients	Delivered policies and SOPs that remain in active use today. For example, Hagerty developed housing recovery and program intake SOPs for New York City’s (NYC’s) CDBG-DR programs following Hurricane Sandy, which continue to guide compliance oversight and grant closeout efforts. Similarly, we created procurement SOPs for Florida counties that still shape local contracting practices. These deliverables not only supported immediate program launch but also established enduring frameworks that help clients avoid repeat compliance pitfalls.

By drawing on both direct experience and lessons from HUD monitoring nationwide, Hagerty ensures North Carolina’s programs will not only be compliant but will also be comprehensive and comprehensible to withstand the most common monitoring and audit challenges.

Firm Qualifications

HUD Compliance Leadership	Policies and SOPs integrate requirements from HUD’s 2025 Revised Universal Notice, 2 CFR Part 200, cross-cutting regulatory requirements, and Federal Register guidance.
Lessons-Learned Integration	Hagerty incorporates findings from other states’ monitoring reports, such as documentation deficiencies, DOB miscalculations and exclusions, and procurement missteps, into policy design to prevent repeat issues in North Carolina.
Financial Strength & Capacity	With strong financial solvency and more than 350 recovery professionals nationwide, Hagerty has the resources to deliver high-quality work quickly and at scale.

Proposed Methodology and Technical Approach

Staffing Plan	<ul style="list-style-type: none"> » Senior Policy Advisors with direct HUD compliance and program design expertise. Subject-matter experts in multifamily and single family housing, community revitalization, mitigation, public services, planning, and infrastructure. » Quality assurance/quality control (QA/QC) specialists who stress-test policies against HUD and OIG criteria.
Ensuring Quality and Timeliness	<ul style="list-style-type: none"> » Use of Hagerty’s policy compliance crosswalks, mapping procedures to HUD’s Revised Universal Notice and federal reporting requirements. » Incorporation of “common monitoring pitfalls” identified across multiple states into program design, ensuring North Carolina avoids repeat findings. » Iterative collaboration with DCR staff to balance compliance and operational feasibility. » Built-in mock monitoring reviews before finalizing policies to confirm readiness for HUD oversight.

Ramp-Up Capability	<ul style="list-style-type: none"> » Rapid deployment of staff already engaged in North Carolina recovery efforts. » Pre-developed SOP templates and HUD reporting structures allow for accelerated mobilization. » Scalable team structure to flex with evolving program needs.
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DELIVERABLES

» Program-specific policies for housing, revitalization, infrastructure, and mitigation.
» Detailed SOPs with step-by-step workflows, documentation standards, and QA/QC controls.
» Templates, forms, and checklists to guide eligibility, benefit calculations, procurement, and records management.
» Standardized HUD reporting structures (Disaster Recovery Grants Reporting [DRGR] System, Quarterly Progress Reports [QPRs], Section 3).
» Closeout procedures designed with HUD monitoring findings in mind to minimize risks at final grant reconciliation.

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

Experience

Hagerty has deep expertise in designing and implementing financial compliance frameworks that protect federal disaster recovery funds from waste, fraud, abuse, and general mismanagement. Our methodology goes beyond compliance with us. We equip our clients with practical tools, automated dashboards, and monitoring frameworks that improve efficiency while meeting HUD and OIG expectations. Our approach emphasizes the following key elements:

Financial Controls and Segregation of Funds	Written procedures, coding systems, and reconciliation tools that clearly separate CDBG-DR expenditures from other funding sources.
Fraud Prevention and Risk Mitigation	Predictive analytics, red-flag indicators, and reporting hotlines designed to detect and deter fraud, waste, and abuse before disbursements occur.
Monitoring and Transparency	Risk-based oversight frameworks supported by site visit checklists, desk review templates, and compliance crosswalks that map directly to HUD and State requirements.
Performance Management	Key Performance Indicator (KPI) dashboards that give decision-makers real-time visibility into reimbursement timeliness, administrative cost ratios, and monitoring outcomes.

Our relevant past performance includes:

Client	Past Performance
Florida (Hurricanes Irma and Michael)	Designed and implemented financial oversight procedures, fraud-prevention controls, and corrective action protocols for housing and infrastructure programs. These systems contributed to HUD monitoring reviews with no adverse findings on these issues.
Nebraska (2019 Flooding)	Developed financial management and reimbursement tracking systems tailored to state fiscal processes, including automated reconciliation tools and monitoring protocols that aligned with HUD requirements.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Assisting in the creation of county-level financial compliance systems, including separation of funds, fraud-reporting hotlines, and custom dashboards for tracking reimbursement speed, administrative costs, and monitoring findings.

Through these engagements, Hagerty has demonstrated the ability to anticipate compliance risks, implement proactive safeguards, and deliver oversight mechanisms that preserve program integrity and withstand the highest levels of federal review.

Firm Qualifications

HUD Financial Compliance Leadership	Expertise in HUD's 2025 Revised Universal Notice, Title 2 of the Code of Federal Regulations (CFR) Part 200, and Office of Management and Budget (OMB) cost principles, with direct experience implementing requirements across multiple states and counties.
Fraud Prevention Leadership	Design and operation of reporting channels, whistleblower protections, and fraud-detection protocols. Hagerty integrates forensic accounting and data analytics tools to spot red flags in reimbursement and procurement records.
Monitoring and Oversight Track Record	Developed toolkits for risk-based monitoring, including site visit checklists, desk review templates, procurement compliance crosswalks, and corrective action tracking logs.
Scalable National Team	Compliance officers, financial analysts, and monitoring specialists who provide surge capacity to meet evolving recovery needs.

Proposed Methodology and Technical Approach

<p>Financial Controls and Tracking</p>	<ul style="list-style-type: none"> » Develop financial management manuals with fund separation and reconciliation requirements. » Deploy compliance crosswalks mapping accounting practices directly to federal and State requirements. » Assist in fund tracking to document expenditure approvals, disbursement timing, and reconciliation steps.
<p>Fraud, Waste, and Abuse Prevention</p>	<ul style="list-style-type: none"> » Configure red-flag detection dashboards to identify irregular transactions or reimbursement anomalies. » Conform to and actively implement DCR’s existing Fraud, Waste, and Abuse policy in all oversight, review, and daily practices. » Conduct forensic sampling reviews of transactions to proactively identify high-risk disbursements.
<p>Monitoring and Oversight</p>	<ul style="list-style-type: none"> » Develop risk-based monitoring plans with tiered review protocols depending on award size, individual project complexity, and subrecipient risk profile. » Provide site visit toolkits including compliance checklists, documentation standards, and interview templates. » Use corrective action tracking systems to document findings, assign responsibilities, and confirm resolution. » Provide iterative compliance technical assistance virtually or onsite to DCR staff, subrecipients, vendors, and developers.
<p>Financial Performance Dashboards</p>	<ul style="list-style-type: none"> » Deploy interactive dashboards showing reimbursement timeliness, administrative cost ratios, monitoring completion rates, and open findings. » Configure drill-down features for county or DCR staff to view subrecipient-level performance in real time. » Integrate with DRGR and state financial systems for automated data pulls, minimizing manual reporting burdens.
<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Financial Oversight Leads with HUD monitoring experience. » Monitoring Analysts and QA/QC Specialists skilled in audit sampling, corrective action tracking, and dashboard development.

<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » QA/QC reviews performed by senior financial compliance officers prior to implementation. » Use of standardized monitoring templates and fraud detection protocols refined across multiple disasters. » Incorporate audit lessons learned from prior HUD/OIG reviews nationwide to mitigate risks before monitoring. » Conduct mock financial audits to validate readiness prior to federal oversight. » Providing model file creation at program launch that is iterative, standardized, and comprehensive that lends itself to facilitating smooth monitoring engagements.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Immediate deployment of financial compliance staff with active disaster recovery experience. » Access to pre-developed monitoring toolkits, fraud detection protocols, and financial dashboards for rapid mobilization. » Scalable staffing model that expands oversight capacity as disbursements accelerate and projects move toward close out.

DELIVERABLES

- » Financial management manuals documenting fund separation and reconciliation requirements.
- » Fraud-prevention toolkits including red-flag dashboards, reporting channels, and forensic sampling procedures.
- » Monitoring plans and toolkits with site visit checklists, desk review forms, and corrective action trackers.
- » Compliance review protocols for award approvals, reimbursements, and procurement oversight.
- » Interactive KPI dashboards for tracking financial performance and monitoring outcomes in real time.
- » Provide technical assistance as needed to subrecipients, DCR staff, and partners.

TASK 3 – Duplication of Benefits Compliance

Experience

Hagerty brings proven expertise in designing and implementing DOB compliance frameworks that ensure CDBG-DR funds are administered in strict alignment with federal law, HUD’s 2025 Revised Universal Notice, and existing guidance. Our approach embeds DOB prevention and monitoring into the foundation of program design, ensuring applicants receive only the assistance they are eligible for while preserving program integrity and minimizing the risk of federal recapture.

Hagerty has supported numerous states and local governments in developing DOB policies, building data-matching systems, and training staff on consistent application of DOB rules. We recognize the complexities

of reconciling multiple funding streams – including FEMA funding, Small Business Administration (SBA), National Flood Insurance Program (NFIP), private insurance, and state/local aid – and the necessity of maintaining accurate, audit-ready records to withstand HUD and OIG review. Our past performance specific to DOB is as follows:

Client	Past Performance
Florida (Hurricanes Irma and Michael)	Authored DOB policies and processing workflows for housing recovery programs, resulting in HUD monitoring reviews with no DOB-related findings.
Nebraska (2019 Flooding)	Designed a statewide DOB compliance system that integrated FEMA, SBA, NFIP, and State disaster assistance into a central repository. Hagerty developed fund-tracking protocols, reconciliation dashboards, and audit logs that enabled Nebraska to meet HUD’s DOB standards while ensuring consistent benefit calculations across multiple state agencies.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Currently tailoring county-level DOB tools including applicant-facing forms, calculation templates, staff checklists, and eligibility certifications. These materials are designed for direct program implementation at the local level, ensuring consistency with HUD’s 2025 Revised Universal Notice while aligning with county procedures and ordinances.

Through these engagements, Hagerty has demonstrated the ability to anticipate DOB compliance risks, deliver scalable systems that function at both state and county levels, and build tools that withstand the most rigorous federal oversight.

Firm Qualifications

Regulatory Expertise	Direct experience implementing DOB compliance requirements under the <i>Robert T. Stafford Disaster Relief and Emergency Assistance Act</i> (Stafford Act), HUD’s 2025 Revised Universal Notice, and existing HUD guidance.
Cross-Program Knowledge	Proficiency reconciling DOB across FEMA IA/PA, SBA loans, NFIP, HMGP, private insurance, and local/State programs.
Proven Tools and Templates	Hagerty-developed DOB calculators, audit-ready eligibility forms, workflow checklists, and staff training modules already in use by multiple states and counties nationwide.
Scalable National Capacity	Over 350 professionals nationwide, including compliance experts, data analysts, and policy specialists available for rapid deployment.

Proposed Methodology and Technical Approach

DOB Policy Development	» Draft DOB verification, prevention, reconciliation, and subrogation/recapture policies fully aligned with HUD’s 2025 Revised Universal Notice and existing HUD guidance, as well as DCR’s existing DOB policy submitted in its financial certifications to HUD.
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	<ul style="list-style-type: none"> » Integrate DOB rules into program SOPs, eligibility reviews, and financial reconciliation procedures.
Data Matching and Risk Mitigation	<ul style="list-style-type: none"> » Deploy data-matching techniques to cross-check applicant records against FEMA, SBA, NFIP, insurance, and other funding streams. » Configure risk flags and automated alerts to flag possible DOB issues at intake or disbursement.
Templates, Forms, and Workflows	<ul style="list-style-type: none"> » Develop standardized verification forms, DOB calculation templates, staff checklists, and certification statements for program staff. » Tailor tools by scale – State-level systems (Nebraska) for integration across agencies vs. county-level forms and workflows (Manatee) for direct implementation. » Ensure that DCR subrogation terms and conditions are included in any contract vehicle and are clearly stated in each program.
DOB Processing and Compliance Management	<ul style="list-style-type: none"> » Create audit-ready DOB files documenting calculations, applicant attestations, and funding source reconciliations. » Conduct ongoing compliance reviews of verification of DOB, supported by corrective action protocols. » Deliver staff and subrecipient training with scenario-based exercises to reinforce consistent application.
Staffing Plan	<ul style="list-style-type: none"> » DOB Compliance Leads with experience authoring HUD-approved DOB policies under the 2025 Revised Universal Notice and related guidance. » Data Analysts specializing in DOB data-matching and dashboard development. » Program Compliance Specialists ensuring accuracy in benefit calculations, eligibility reviews, and audit preparation.
Ensuring Quality and Timeliness	<ul style="list-style-type: none"> » Use of Hagerty’s DOB compliance crosswalks, which map policies and workflows directly to the 2025 Revised Universal Notice and related guidance. » Integration of lessons learned from HUD and OIG findings to proactively address recurring compliance risks. » Iterative collaboration with client staff to ensure tools are practical, consistent, and implementable. » Conduct mock DOB reviews to validate accuracy, documentation sufficiency, and audit readiness prior to rollout.
Ramp-Up Capability	<ul style="list-style-type: none"> » Rapid deployment of DOB compliance experts familiar with current HUD Notice and guidance. » Immediate mobilization of pre-developed DOB templates, calculators, workflows, and training modules. » Scalable staffing structure capable of expanding oversight capacity as program volume and complexity grow.

DELIVERABLES

- » Maintain DOB prevention and reconciliation policies aligned with HUD’s 2025 Revised Universal Notice and previously existing HUD guidance.
- » Data-matching systems with built-in risk flags and automated alerts.
- » Standardized forms, templates, and staff checklists tailored to State or county-level program needs.
- » Audit-ready DOB processing and compliance management systems, including corrective action protocols.
- » Interactive dashboards for tracking eligibility determinations, DOB adjustments, and monitoring results.

TASK 4 – Procurement Compliance and Monitoring

Experience

Our team has demonstrated a track record of supporting state and local governments with the design and oversight of procurement compliance systems for CDBG-DR and other federally funded programs. Transparent, competitive procurement is central to program integrity and HUD compliance. Hagerty helps jurisdictions ensure that solicitations and contracts meet the requirements of HUD’s 2025 Revised Universal Notice, 2 CFR Part 200, and state/local rules, while maintaining the speed necessary for disaster recovery.

Our expertise includes:

- » Structuring procurement frameworks that balance compliance with operational needs.
- » Establishing cost reasonableness methodologies and documentation standards for contractor selection.
- » Designing procurement monitoring tools that support findings-free HUD, OIG, and internal State annual audit reviews.

Examples of relevant past performance include:

Client	Past Performance
Florida (Hurricanes Irma and Michael)	Developed procurement protocols and contract oversight procedures for recovery programs, which were reviewed by HUD with no procurement findings.
Nebraska (2019 Flooding)	Designed a Statewide procurement monitoring framework, including solicitation templates, evaluation scorecards, and procurement file review checklists, ensuring consistency across multiple State agencies.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Supporting the County in creating local-level procurement tools, such as standardized bid templates, vendor evaluation forms, and contract compliance trackers, tailored for direct use by County staff.

Firm Qualifications

Procurement Compliance Expertise	Knowledge of procurement requirements in 2 CFR Part 200, related HUD Revised Universal Notice guidance, and State/local procurement laws.
Competitive Contracting Leadership	Experience designing transparent bid evaluation systems and vendor selection protocols to ensure fairness and competition.
Audit-Proven Systems	Procurement policies and tools authored by Hagerty have passed HUD and OIG reviews without findings.
National Capacity	More than 350 professionals nationwide, including procurement specialists, monitoring analysts, and contract oversight staff.

Proposed Methodology and Technical Approach

Procurement Policies and Guidance	<ul style="list-style-type: none"> » Maintain and update procurement policies that integrate HUD’s 2025 Revised Universal Notice and 2 CFR Part 200 requirements. » Provide clear contracting guidance for competitive solicitations, best source practicably available, and noncompetitive justifications based on federal and State thresholds and cost reasonableness analysis.
Documentation Standards	<ul style="list-style-type: none"> » Develop standardized templates for solicitations, bids, quotes, vendor evaluations, and contract awards. » Implement file documentation protocols to demonstrate every procurement has undergone the appropriate purchasing methodology and is compliant with federal and State requirements and supporting documentation is maintained.
Monitoring and Oversight	<ul style="list-style-type: none"> » Build procurement monitoring plans with desk review checklists and site visit procedures. » Design contract oversight workflows to track contract modifications, vendor performance, and cost reasonableness review. » Deliver training sessions for subrecipient, vendor, developer, and State staff on procurement compliance, competitive contracting, advertising, and recordkeeping.
Staffing Plan	<ul style="list-style-type: none"> » Procurement Policy Advisors with direct federal contracting experience. » Monitoring Specialists to conduct procurement reviews as well as subrecipient and vendor oversight. » QA/QC Analysts to validate procurement records and monitoring results against HUD and OIG criteria.

<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Use of procurement compliance crosswalks linking federal and State requirements to local practices. » Integration of lessons learned from HUD and OIG procurement reviews, including findings on insufficient competition and inadequate cost documentation. » Conduct mock procurement reviews before rollout to confirm readiness for federal oversight.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of procurement compliance experts with prior disaster recovery experience. » Immediate mobilization of pre-developed solicitation templates, vendor evaluation tools, and monitoring checklists. » Scalable staffing model to expand contract oversight as procurement activity increases.

DELIVERABLES

<ul style="list-style-type: none"> » Written procurement policies consistent with federal, State, and local requirements.
<ul style="list-style-type: none"> » Templates and documentation standards for solicitations, bids, and contract records.
<ul style="list-style-type: none"> » Procurement monitoring tools and compliance tracking workflows.
<ul style="list-style-type: none"> » Training materials for staff and subrecipients on competitive procurement and recordkeeping best practices.

TASK 5 – Claims, Appeals, and Case Reviews

Experience

Hagerty offers comprehensive experience with developing and implementing standardized processes for managing claims, appeals, and case reviews in CDBG-DR Programs. We understand that transparent, consistent review procedures are essential to ensuring fairness for applicants while safeguarding programs against compliance risks and audit findings.

Our team has worked with states and local governments to design end-to-end case management workflows that address eligibility reviews, appeals, exceptions, and escalations. By embedding compliance controls and documentation standards into these processes, Hagerty ensures determinations are well-documented, defensible, and fully audit-ready. Examples of relevant past performance include:

Client	Past Performance
<p>Florida (Hurricanes Irma and Michael)</p>	<p>Authored case review and appeals procedures for housing programs, integrating escalation protocols and standardized applicant notifications that passed HUD and OIG monitoring with no findings.</p>

Nebraska (2019 Flooding)	Supported the State in establishing case review and appeal procedures for housing and infrastructure programs, including centralized decision logs, standardized appeal forms, and escalation protocols to improve consistency across multiple state agencies.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Assisting the County in designing local-level claims and appeals processes, including applicant notification templates, checklists for benefit recalculations, and exception request workflows tailored to county-managed programs.

Across these engagements, Hagerty’s case review frameworks have improved efficiency, reduced errors, built applicant trust, and ensured compliance with HUD’s 2025 Revised Universal Notice.

Firm Qualifications

Case Review and Appeals Expertise	Direct experience designing workflows and procedures for CDBG-DR claims, appeals, and exceptions.
Audit Readiness	Skilled at embedding documentation standards that withstand HUD, OIG, and state oversight reviews.
Standardization Tools	Developers of review checklists, decision logs, electronic case tracking tools, and applicant notification templates that ensure consistency across staff and subrecipients.
Training Capacity	Proven ability to create and deliver training that equips staff with the knowledge to apply case review procedures consistently and fairly.

Proposed Methodology and Technical Approach

Written Procedures and Workflows	<ul style="list-style-type: none"> » Draft step-by-step case review procedures covering claims, appeals, exceptions, and escalation. » Establish decision-making protocols that balance compliance with equitable treatment of applicants.
Standardized Documentation Tools	<ul style="list-style-type: none"> » Develop review checklists, decision logs, and notification templates for staff and applicants. » Implement electronic case review tools that streamline documentation and create audit-ready records.
Training and Capacity Building	<ul style="list-style-type: none"> » Create training curricula and workshops to prepare staff on claims, appeals, and exception handling. » Emphasize fairness, transparency, and defensibility in all determinations.
Audit Readiness and Oversight Support	<ul style="list-style-type: none"> » Embed compliance controls into workflows to ensure determinations are fully documented and defensible. » Provide technical assistance in responding to HUD, State, or OIG inquiries related to case reviews and appeals.

<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Train and assign Compliance Officers to ensure align with procedures HUD’s 2025 Revised Universal Notice and state requirements. » Training Leads to develop and deliver staff training and provide ongoing quality assurance. » Ensure that a designated appeals manager is neutral and impartial and has had no previous involvement with an appellant/case so that a decision is fully impartial and defensible.
<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Use of Hagerty’s case review compliance crosswalks, aligning procedures with HUD’s 2025 Revised Universal Notice. » Application of lessons learned from prior HUD and OIG case review audits, particularly around inconsistent documentation and escalation handling. » Iterative collaboration with client staff to ensure processes are both compliant and practical in high-volume case environments. » Conduct mock case reviews to validate workflows and confirm readiness for HUD oversight.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of case review and appeals experts with active disaster recovery program experience. » Immediate mobilization of pre-developed decision logs, notification templates, and exception request tools. » Scalable staffing model to expand case review and appeals support as program caseload increases.

DELIVERABLES

- » Written case review, appeal, and escalation procedures aligned with HUD’s 2025 Revised Universal Notice.
- » Standardized tools including review checklists, decision logs, applicant notification templates, and exception forms.
- » Staff training packages for consistent and fair application of review procedures.
- » Audit readiness support, including documentation protocols and assistance with HUD, state, or OIG oversight inquiries.

TASK 6 – Action Plan Development and Amendments

Experience

We are uniquely positioned in supporting states and local governments in the development, amendment, and submission of CDBG-DR Action Plans. We understand that Action Plans are more than compliance documents, they are strategic recovery roadmaps that must balance HUD’s regulatory precision, community priorities, and transparent engagement processes.

Our team has authored Action Plans and amendments/substantial amendments that HUD expeditiously approved, ensuring jurisdictions accessed funding quickly. We bring direct experience translating complex unmet needs, mitigation priorities, and program structures into clear, defensible narratives backed by data and stakeholder input. Examples of relevant past performance include:

Client	Past Performance
St. Louis County, Missouri (2022 Floods)	Authored the \$56.4 million CDBG-DR Action Plan, integrating unmet housing and infrastructure needs, mitigation priorities, and equity analysis in full compliance with HUD’s 2025 Revised Universal Notice.
Nebraska (2019 Flooding)	Supported the State in drafting its CDBG-DR Action Plan and amendments, including HUD-compliant unmet needs analyses, funding allocations, and public participation documentation that enabled rapid HUD approval.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Drafted Action Plan language framing infrastructure investments as critical to housing recovery, ensuring alignment with HUD’s resilience and mitigation priorities.

Across these projects, Hagerty has demonstrated the ability to deliver audit-ready Action Plans that both satisfy HUD requirements and reflect community-driven recovery priorities.

Firm Qualifications

Action Plan Leadership	Proven track record drafting Action Plans and amendments under applicable statutes, HUD’s 2025 Revised Universal Notice and related guidance.
Technical Writing Expertise	Specialists in translating unmet needs data, mitigation priorities, and program designs into clear, narratives that reflect HUD’s programmatic goals. We are able to clearly identify and demonstrate to HUD in amendments/substantial amendments the rationale for changes to the initial and subsequent versions of the Action Plan.
Stakeholder Engagement	Experience designing, facilitating, and documenting public participation that fully satisfies HUD’s citizen participation requirements.
National Capacity	More than 350 professionals nationwide, including technical writers, data analysts, and engagement specialists who can be mobilized quickly.

Proposed Methodology and Technical Approach

Drafting Action Plan Language and Submission Packages	<ul style="list-style-type: none"> » Prepare Action Plan narratives rooted in unmet needs and mitigation analyses, structured to meet HUD requirements. » Compile supporting documentation, tables, and appendices required for HUD submission. » Use compliance crosswalks to ensure Action Plans address every element of HUD’s requirements, reducing the risk of HUD findings or approval delays.
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<p>Public Comment and Stakeholder Engagement</p>	<ul style="list-style-type: none"> » Design and document public comment periods in accordance with HUD’s citizen participation rules. » Produce public hearing materials, response logs, and engagement records to demonstrate compliance. » Maintain comprehensive consultation documentation to ensure transparency and defensibility.
<p>Amendment Support</p>	<ul style="list-style-type: none"> » Draft amendments responsive to evolving recovery needs, agile incorporation of programmatic re-evaluations and redesigns, updated allocations, or new HUD guidance. » Ensure amendment processes are fully compliant with HUD’s citizen participation and public notice standards. » Evaluate need for waivers/alternative requirements to implement DCR’s goals and draft requests for consideration by and approval by HUD.
<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Action Plan Development Leads with direct experience authoring HUD-approved Action Plans. » Policy and Technical Writers skilled at converting complex technical data into clear, compliant narratives. » Stakeholder Engagement Specialists to design and document public participation processes.
<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Application of Hagerty’s Action Plan compliance crosswalks, mapping HUD’s requirements to narrative sections. » Iterative collaboration with client staff to ensure Action Plans reflect local priorities, community needs, and recovery objectives. » Mock HUD readiness reviews to confirm compliance prior to submission. » Deployment of lessons learned from HUD approvals nationwide, including common feedback trends, to strengthen client deliverables.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid mobilization of Action Plan experts with recent HUD submission experience. » Immediate adaptation of pre-developed Action Plan templates, reporting tables, and submission structures. » Scalable staffing structure to support initial Action Plan development, amendments, and ongoing compliance reporting.

DELIVERABLES

<ul style="list-style-type: none"> » Draft Action Plan language, HUD-compliant tables, and submission-ready packages.
<ul style="list-style-type: none"> » Complete public comment documentation including engagement records, hearing materials, and response logs.

- » Amendment drafts and supporting documentation, ensuring compliance with HUD’s citizen participation and amendment requirements.

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

Experience

Hagerty has successfully conducted UNAs, market analyses, and geospatial data integration to guide the design and allocation of CDBG-DR resources. Our approach combines rigorous quantitative methods with local context to ensure recovery programs are targeted, equitable, and grounded in reliable, defensible data.

We have developed assessments that not only meet HUD’s technical requirements but also provide actionable insights for policymakers, stakeholders, and communities. Hagerty’s geospatial capabilities allow us to visualize recovery needs, prioritize investments, and clearly communicate program strategies to the public and oversight entities. Examples of our past performance include, but are not limited to:

Client	Past Performance
City of Santa Rosa, California (2017 Wildfires)	Supported the City in preparing for and implementing CDBG-DR and CDBG-MIT funding. Hagerty conducted an unmet needs assessment that identified over \$350 million in damages from the Tubbs Fire, uncovering a critical discrepancy between FEMA’s Individual Assistance data (1,061 homes identified with major/severe damage) and local data showing 3,952 homes meeting HUD’s damage criteria. This analysis, presented to HUD, influenced secondary allocation considerations. Hagerty also assisted Santa Rosa in securing \$38 million under the Multi-Family Home Program and \$1.2 million through California’s FEMA PA Infrastructure Match Program, while providing grant strategy, compliance, and monitoring support.
St. Louis County, Missouri (2022 Floods)	Conducted the CDBG-DR unmet needs assessment and resource allocation analysis, integrating FEMA, SBA, NFIP, and local data into dashboards and geospatial products to inform a \$56.4 million Action Plan.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Developed unmet needs and mitigation analyses that framed infrastructure investments as essential to long-term housing recovery, supported by geospatial visualizations for public hearings.

Across these engagements, Hagerty has demonstrated the ability to translate complex datasets into clear, defensible analyses that inform equitable recovery strategies, withstand federal scrutiny, and expand funding opportunities for clients.

Firm Qualifications

Needs Assessment Expertise	Skilled in preparing HUD-compliant unmet needs, market, and gap analyses that directly inform Action Plans and funding allocations.
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Geospatial Capabilities	Experienced in producing maps, dashboards, and interactive visualizations that communicate recovery needs and program impacts to policymakers, stakeholders, and the public.
Data Integration Strength	Proven ability to combine FEMA, SBA, NFIP, Census, insurance, and local datasets into comprehensive assessments.
National Capacity	More than 350 recovery professionals, including data scientists, geospatial analysts, and policy experts available to support large-scale assessments.

Proposed Methodology and Technical Approach

Unmet Needs Assessments and Market Analysis	<ul style="list-style-type: none"> » Conduct housing, infrastructure, and economic recovery UNA in accordance with HUD’s 2025 Revised Universal Notice. » Perform market studies and gap analyses to identify barriers to recovery and align resource allocation with documented needs. » Develop resource allocation frameworks that prioritize vulnerable populations and high-impact recovery strategies. » Evaluate need for waivers/alternative requirements from HUD to support State’s programmatic goals and draft requests for HUD consideration upon request.
Geospatial Data Products	<ul style="list-style-type: none"> » Produce maps, dashboards, and visualizations to support decision-making, public transparency, and HUD reporting. » Overlay recovery needs with social vulnerability and environmental risk indicators to guide targeted investments.
Data Integration	<ul style="list-style-type: none"> » Integrate data from FEMA, SBA, NFIP, Census, local jurisdictions, and insurance records to create comprehensive datasets. » Use extant industry and academic studies, white papers, and other policy-guiding documents and expand upon them to comprehensively demonstrate a given gap or need for specific activities and projects. » Develop data pipelines and update processes that support continuous monitoring throughout program implementation.
Staffing Plan	<ul style="list-style-type: none"> » Data and Policy Analysts experienced in unmet needs and market assessments for CDBG-DR programs. » Geospatial Analysts skilled in developing maps, dashboards, and visualizations tailored to HUD requirements. » Planning Specialists ensuring all analyses align with evidence-based data and demonstrate defensible methodologies and approach.

<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Use of Hagerty’s UNA templates and compliance crosswalks mapped to HUD’s 2025 Revised Universal Notice. » Iterative collaboration with client staff to ensure analyses reflect state and local priorities. » Deployment of lessons learned from prior HUD-approved assessments, particularly around FEMA, SBA, NFIP data integration. » QA/QC reviews conducted by senior data and compliance experts prior to submission.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of unmet needs and geospatial experts with active CDBG-DR program experience. » Immediate adaptation of Hagerty’s pre-developed assessment frameworks, market analysis models, and geospatial templates to client needs. » Scalable staffing model to expand analytic support as new data becomes available or as program needs evolve.

DELIVERABLES

<ul style="list-style-type: none"> » UNA, market studies, gap analyses, and resource allocation reports.
<ul style="list-style-type: none"> » Geospatial data products including maps, dashboards, and visualizations for public transparency and HUD compliance.
<ul style="list-style-type: none"> » Integrated datasets from FEMA, SBA, NFIP, Census, insurance, and local sources to support comprehensive needs assessments.

TASK 8 – Program Performance Monitoring and Evaluation

Experience

Hagerty has established best practices in designing and implementing program performance monitoring and evaluation frameworks for CDBG-DR Programs. We recognize that effective monitoring goes beyond compliance, it is also about measuring progress, demonstrating impact, and ensuring programs are executed efficiently and effectively.

Our team has developed tracking tools, milestone schedules, dashboards, and reporting templates that align with HUD’s requirements while meeting the operational needs of program administrators. Hagerty is also highly experienced in supporting DRGR, ensuring states and local governments maintain accurate, timely, and complete submissions to HUD. Our past performance includes:

Client	Past Performance
<p>State of Nebraska (2019 Floods)</p>	<p>Supported the State’s DRGR submissions and performance reporting, ensuring timely and accurate quarterly reports. Hagerty also developed monitoring</p>

	frameworks and tracking tools that helped the State meet HUD and OIG standards, with zero findings.
City of Santa Rosa, California (2017 Wildfires)	Provided program monitoring and evaluation support for the City’s role as a subrecipient under California’s CDBG-DR Programs, including oversight of a \$38 million multifamily housing program and the FEMA PA Infrastructure Match Program. Hagerty designed performance monitoring protocols, compliance review processes, and reporting tools that strengthened program oversight and ensured audit readiness.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Designing program reporting structures, milestone tracking dashboards, and DRGR support systems that will enable County leadership to monitor recovery progress, expenditures, and HUD compliance in real time.

Across these engagements, Hagerty has built monitoring and evaluation systems that withstand HUD review while giving states and local governments real-time visibility into program execution and outcomes.

Firm Qualifications

Performance Monitoring Leadership	Expertise in building systems for milestone tracking, compliance monitoring, and program evaluation aligned with CDBG-DR requirements.
DRGR Expertise	Skilled in supporting and executing DRGR entries, QPR submissions, and closeout reporting, with a proven record of error-free HUD reviews.
Customizable Tools	Ability to design dashboards, templates, and reporting frameworks tailored to HUD’s requirements and client operational needs.
National Capacity	More than 350 professionals nationwide, including monitoring and evaluation specialists, data analysts, and DRGR experts.

Proposed Methodology and Technical Approach

Timelines, Milestones, and Progress Tracking	<ul style="list-style-type: none"> » Develop program-specific timelines and milestone schedules tied to HUD and State reporting requirements. » Provide tracking tools and standardized reporting templates to streamline progress monitoring across all programs.
Performance Metrics and Compliance Monitoring	<ul style="list-style-type: none"> » Define and track KPIs such as reimbursement timeliness, program beneficiary subscription and project closeout rates, and expenditure progress. » Design compliance monitoring tools that align with HUD’s expectations and withstand OIG audits.
DRGR Support and Execution	<ul style="list-style-type: none"> » Support DRGR data entry, QPRs, and closeout submissions. » Conduct QA/QC reviews of DRGR data to ensure accuracy, timeliness, and defensibility. » Deliver training and technical assistance to build long-term DRGR capacity for client staff.

<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Monitoring and Evaluation Specialists with direct CDBG-DR oversight experience. » DRGR Experts experienced in managing QPRs, Action Plan amendments, and closeout reporting. » Data Analysts to build dashboards, track KPIs, and integrate compliance monitoring tools.
<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Application of Hagerty’s monitoring and evaluation crosswalks, aligning timelines, metrics, and DRGR requirements with HUD’s 2025 Revised Universal Notice. » QA/QC reviews by Hagerty’s senior compliance team before DRGR submissions. » Iterative collaboration with client staff to ensure monitoring systems are practical, transparent, and responsive to state and local needs. » Deployment of lessons learned from HUD monitoring reviews, avoiding common reporting pitfalls.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of monitoring and evaluation staff with active CDBG-DR experience. » Immediate mobilization of pre-developed progress tracking templates, dashboards, and DRGR reporting structures. » Scalable staffing model to expand monitoring and evaluation support as program activity increases.

DELIVERABLES

- » Program-specific timelines, milestone tracking tools, and reporting templates.
- » Performance metric tracking systems and compliance monitoring tools.
- » DRGR support and execution, including QPR preparation, submission, and closeout reporting.

TASK 10 – Audit Readiness and Monitoring Support

Experience

Hagerty has consistently supported state and local governments in planning for HUD monitoring visits, OIG audits, and State-level compliance reviews. We understand that audit readiness requires more than just compliance, it demands proactive organization, clear documentation, and the ability to demonstrate adherence to federal and state requirements under scrutiny. Audit readiness commences prior to a program launch and begins long before any activity takes place thereby ensuring that any given project/program is audit ready, regardless of its position on a timeline.

Our team has developed readiness review tools, corrective action protocols, and audit response templates that have enabled clients to pass monitoring reviews with no findings. Hagerty’s approach emphasizes both

prevention and response: we help programs organize records and systems to withstand oversight while also drafting effective, defensible responses to concerns or inquiries. Examples of our past work are described below.

Client	Past Performance
State of Nebraska (2019 Floods)	Assisted the State in preparing for HUD monitoring visits and OIG reviews by creating standardized documentation protocols and corrective action tracking systems. Hagerty’s work provided HUD confidence in Nebraska’s ability to administer funds effectively and resolve monitoring risks.
City of Santa Rosa, California (2017 Wildfires)	Supported the City’s role as a CDBG-DR subrecipient by developing monitoring support tools and audit readiness checklists for its \$38 million multifamily housing program and FEMA PA Infrastructure Match Program. Hagerty provided file reviews, compliance testing, and corrective action protocols that ensured the City met state and HUD oversight requirements.
New York City, New York (Superstorm Sandy)	Provided extensive monitoring and audit readiness support for NYC’s multi-billion-dollar CDBG-DR portfolio, including mock monitoring reviews, corrective action plan development, and documentation crosswalks that aligned program files with HUD and OIG standards. Hagerty also drafted responses to monitoring reports and supported the closure of findings across multiple housing and infrastructure programs.

Across these engagements, Hagerty has demonstrated the ability to anticipate monitoring risks, strengthen documentation practices, and support corrective action implementation to safeguard program funds.

Firm Qualifications

Audit and Monitoring Expertise	Deep knowledge of HUD monitoring protocols, OIG audit requirements, and State-level oversight processes.
Corrective Action Leadership	Experience developing corrective action plans and tracking systems that resolve findings efficiently.
Audit-Proven Track Record	Hagerty-authored readiness tools and responses have consistently withstood HUD and OIG reviews.
National Capacity	More than 350 recovery professionals nationwide, including compliance officers, monitoring specialists, and financial analysts.

Proposed Methodology and Technical Approach

Readiness Review Tools and Checklists	<ul style="list-style-type: none"> » Develop program file and system readiness checklists tailored to HUD monitoring requirements. » Conduct mock monitoring visits to assess documentation, systems, and QA/QC controls.
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<p>Drafting Responses to Monitoring and Audit Findings</p>	<ul style="list-style-type: none"> » Prepare draft responses for State use in responding to HUD or state monitoring reports and compliance inquiries. » Provide documentation and evidence to support defensible responses to findings.
<p>Corrective Action Plans and Tracking</p>	<ul style="list-style-type: none"> » Create Corrective Action Plans (CAPs) with clear responsibilities, timelines, and resolution criteria. » Develop CAP tracking tools to monitor progress and close areas of concern or inquiries quickly. » Provide technical assistance to subrecipients and contractors to meet corrective action requirements.
<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Monitoring and Audit Specialists experienced in HUD oversight processes. » Compliance Analysts to develop readiness tools, conduct reviews, and draft responses to findings.
<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Use of Hagerty’s audit readiness crosswalks, mapping HUD’s monitoring protocols and OIG requirements to program files and documentation. » Incorporation of lessons learned from prior HUD and OIG reviews, including common pitfalls in procurement, DOB, and recordkeeping. » QA/QC reviews by senior compliance specialists to ensure responses and corrective actions are defensible and timely. » Iterative collaboration with client staff to tailor readiness tools and CAPs to the local program environment.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of monitoring and audit readiness experts already supporting CDBG-DR recovery across multiple states and local governments. » Immediate adaptation of Hagerty’s pre-developed audit readiness checklists, monitoring tools, and CAP templates. » Scalable staffing structure to expand support for large monitoring events or concurrent audits.

DELIVERABLES

- » Readiness review tools and checklists for program files, systems, and documentation.
- » Draft responses to HUD, OIG, state, or other compliance monitoring reports and audit findings.
- » Corrective action plans and tracking tools to ensure concerns or clarifications are resolved and closed.

TASK 12 – Training, Technical Assistance, and Capacity Building

Experience

Hagerty has a proven track record of delivering training, technical assistance, and capacity building to state and local governments administering CDBG-DR Programs. We understand that strong program implementation requires not only compliant policies and procedures but also staff, subrecipients, and partners who are trained to apply them consistently.

Our team has provided targeted compliance training, instructional support, and direct technical assistance nationwide. Hagerty’s approach emphasizes hands-on support and real-world application that equips program staff with the confidence and tools to navigate complex CDBG-DR requirements. In addition, we provide tailored technical assistance that strengthens state and local capacity for program delivery, ensuring consistency, transparency, and accountability. Examples of our past performance are provided below.

Client	Past Performance
North Carolina (Hurricane Helene)	Currently providing direct technical assistance to the State on multifamily housing program delivery, assisting with program interpretation, eligibility support, and compliance guidance to ensure consistent and compliant statewide implementation.
State of Nebraska (2019 Floods)	Designed training modules and technical assistance guidance for subrecipients, building capacity in eligibility review, documentation standards, and HUD reporting requirements. Hagerty’s efforts enabled Nebraska to strengthen local program delivery and reduce compliance risks across its CDBG-DR portfolio.
City of Asheville, North Carolina (Hurricane Helene)	Assisted the City with CDBG-DR Program implementation support, delivering training and technical assistance sessions on application intake, eligibility determinations, and program compliance. Hagerty provided custom reference tools and staff support to ensure consistent application of HUD requirements at the municipal level.
The Council of State Community Development Agencies	Produced a definitive “bootcamp” manual on CDBG-DR for the Council of State Community Development Agencies (COSDA). This 350-page manual addressed a wide range of CDBG-DR topics with a focus on eligible activities, national objective, and applicable cross-cutting requirements. It also provided state grantees with advice on developing policies and procedures as well as a detailed discussion of program design considerations and best practices. COSDA has retained Hagerty to update the manual to reflect CDBG-DR policy changes made by HUD’s Universal Notice and implementation of the current Administration’s broader policy initiatives.
City of Detroit, Michigan	Supports the City of Detroit under HUD’s Technical Assistance engagement, providing targeted expertise to strengthen the City’s CDBG and related HUD-funded programs. This includes reviewing policies and procedures, advising on compliance with HUD regulations, and delivering hands-on training for City staff to improve grant administration and oversight. Provided guidance on financial management and performance reporting, helping Detroit enhance its internal capacity to effectively manage federal resources and sustain long-term program success.

Across these engagements, Hagerty has demonstrated its ability to translate complex federal requirements into practical TA and training resources that enhance state and local capacity while ensuring compliance.

Firm Qualifications

Training Development Expertise	Experienced in designing curriculum, instructional materials, and interactive training sessions tailored to CDBG-DR requirements. Proposed Hagerty staff have also been HUD Community Compass and Enterprise Foundation technical assistance providers to grantees and subrecipients.
Technical Assistance Leadership	Proven ability to provide direct technical assistance on program design, multifamily housing implementation, and eligibility reviews.
Capacity Building Approach	Focused on strengthening long-term client capacity by embedding tools, resources, and best practices into program operations.
Scalable Resources	Over 350 professionals nationwide, including trainers, policy specialists, and compliance experts who can deliver TA both in-person and remote.

Proposed Methodology and Technical Approach

Regulatory Compliance Training	<ul style="list-style-type: none"> » Deliver training sessions for DCR staff, subrecipients, and partners on HUD’s 2025 Revised Universal Notice, 2 CFR Part 200, and other applicable requirements. » Provide refresher and onboarding trainings to ensure knowledge retention throughout program implementation.
Technical Assistance for Program Implementation	<ul style="list-style-type: none"> » Provide direct technical assistance to State staff on program operations and compliance requirements. » Assist with program interpretation, eligibility determinations, and compliance reviews to support consistent statewide implementation.
Application Intake and Eligibility Review Support	<ul style="list-style-type: none"> » Deliver hands-on technical assistance to staff on intake processes, eligibility determination, and DOB compliance. » Provide reference tools and checklists that improve consistency in benefit calculations and case determinations.
Transparency, Reporting, and Accountability Tools	<ul style="list-style-type: none"> » Provide tools and resources to support transparency, standardized reporting, and accountability. » Train staff on the use of dashboards, checklists, and tracking systems to improve oversight and reporting accuracy.

<p>Staffing Plan</p>	<ul style="list-style-type: none"> » Technical Assistance and Capacity Building Specialists with experience supporting housing and infrastructure program implementation. » Policy and Compliance Experts to provide technical assistance on program rules and eligibility determinations. » Instructional Designers and Writers to prepare training materials, manuals, and learning resources for subrecipients and local staff.
<p>Ensuring Quality and Timeliness</p>	<ul style="list-style-type: none"> » Use of Hagerty’s standardized training modules, cross-walked to HUD’s 2025 Revised Universal Notice and OIG monitoring criteria. » QA/QC reviews of all technical assistance and training resources by senior compliance staff prior to delivery. » Iterative collaboration with DCR staff to ensure technical assistance aligns with program priorities and compliance needs. » Continuous improvement through post-training evaluations and knowledge checks.
<p>Ramp-Up Capability</p>	<ul style="list-style-type: none"> » Rapid deployment of training and technical assistance teams currently engaged in North Carolina recovery programs. » Immediate adaptation of pre-developed compliance tools and technical assistance templates to the State’s program needs. » Scalable capacity to deliver Statewide training and technical assistance both in-person and virtually.

DELIVERABLES

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

TASK 14 – Communication, Public Information, and Outreach Support

Experience

Hagerty has been trusted to oversee supporting public communication, information dissemination, and outreach for federally funded disaster recovery programs. We understand that effective communication is essential not only for program transparency and compliance with HUD requirements, but also for building trust with impacted communities.

Our team has designed fact sheets, frequently asked questions (FAQs), and website content that explain complex CDBG-DR programs in plain language. We also create outreach materials that are culturally appropriate, linguistically accessible, and compliant with Section 504, the *Americans with Disabilities Act* (ADA), and Title VI requirements. In addition, Hagerty provides structured protocols for crisis communication and media responses to ensure consistent messaging across stakeholders. Examples of our past performance are described below.

Our Experts: Jessi Widhalm

Previously served as FEMA’s Director of External Affairs, where she led national-level communications and stakeholder engagement during major disasters. With over a decade of experience in public affairs, crisis communication, and media strategy, Ms. Widhalm brings exceptional skill in translating complex recovery programs into clear, accessible messaging.

Client	Past Performance
St. Louis County, Missouri (2022 Floods)	Designed public-facing materials, including fact sheets, FAQs, and website content, for the County’s CDBG-DR Action Plan, ensuring accessibility and transparency during the public comment period. Hagerty also supported facilitation of public hearings and documented compliance with HUD citizen participation requirements.
Lee County, Florida (Hurricane Ian)	Supported the Lee County Recovery Task Force by developing outreach strategies, public-facing communications, and multilingual engagement tools to connect with impacted residents. Hagerty created plain-language materials, fact sheets, and meeting resources to promote transparency and ensure diverse community voices were included in recovery planning.
Mobile County, Alabama (Hurricanes Sally and Zeta)	Supported the County in designing and executing outreach and communication strategies for CDBG-DR housing and infrastructure programs. Hagerty developed program FAQs, flyers, and public meeting presentations, as well as protocols for public inquiries and media responses. Our team worked alongside County officials to support public hearings, stakeholder engagement, and resident outreach, ensuring that recovery resources were clearly communicated and accessible to all communities.

Across these engagements, Hagerty has demonstrated the ability to deliver clear, consistent, and inclusive public information resources that meet HUD’s citizen participation requirements and build community confidence. **As part of our work with DCR, we also supported the development of the State’s required Citizen Participation Plan within the HUD-approved Action Plan.** This experience uniquely positions us to ensure that DCR continues to meet HUD’s expectations for transparency, accessibility, and meaningful public involvement.

Firm Qualifications

Public Communication Expertise	Skilled in translating complex regulatory requirements into plain-language public materials.
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Accessibility and Equity Focus	Experienced in producing multilingual and accessible materials that meet HUD’s language access and civil rights requirements.
Outreach Strategy Development	Strong record of supporting stakeholder engagement through structured public meetings, outreach events, and media coordination.
Crisis Communication Capacity	Established communication protocols for disaster-related inquiries, ensuring timely and consistent messaging under public and media scrutiny.

Proposed Methodology and Technical Approach

Public Information Materials	<ul style="list-style-type: none"> » Develop fact sheets, FAQs, flyers, and website content explaining program requirements in clear, accessible language. » Standardize templates for public updates, press releases, and stakeholder notices.
Outreach and Accessibility	<ul style="list-style-type: none"> » Create outreach materials tailored for impacted communities, including translations, alternative formats (e.g., large print, audio), and ADA-compliant versions. » Support public meetings and outreach events with facilitation guides, presentation decks, and sign-in documentation.
Communication Protocols	<ul style="list-style-type: none"> » Establish protocols for handling public inquiries, media requests, and crisis communication. » Provide talking points and message guidance for staff and partners to ensure consistent external messaging.
Stakeholder Engagement Support	<ul style="list-style-type: none"> » Assist with planning, facilitating, and documenting public hearings, stakeholder workshops, and community engagement events. » Develop records of outreach and participation to support HUD citizen participation requirements.
Staffing Plan	<ul style="list-style-type: none"> » Communications Specialists with experience in disaster recovery program outreach. » Accessibility Advisors to ensure language access, ADA compliance, and culturally appropriate outreach.
Ensuring Quality and Timeliness	<ul style="list-style-type: none"> » Use of Hagerty’s communication templates and outreach toolkits, tailored to HUD’s citizen participation requirements. » QA/QC reviews of all materials by compliance and communications specialists before release. » Iterative collaboration with DCR staff to align communication strategies with program priorities and community needs. » Deployment of lessons learned from past HUD public engagement reviews to avoid common pitfalls in outreach documentation.

Ramp-Up Capability	<ul style="list-style-type: none"> » Rapid deployment of communications and outreach teams already engaged in disaster recovery programs nationwide. » Immediate use of pre-developed fact sheets, templates, and outreach materials for accelerated mobilization. » Scalable staffing model to expand support during high-volume outreach periods (e.g., Action Plan hearings, program launches).
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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, with translations 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.

TASK 15 – Grant Management

Experience

Hagerty provides specialized expertise in providing grant management services to states and local governments administering CDBG-DR funding. We understand that effective grant management requires a balance of compliance, efficiency, and accountability, ensuring programs described in the Action Plan are implemented transparently and in full alignment with HUD requirements.

Our team has supported subrecipient contracting, compliance oversight, reporting, and grant closeout activities for disaster recovery programs nationwide. Hagerty has also developed tools and processes to facilitate reporting, recordkeeping, and performance tracking that withstand HUD, OIG, and state-level monitoring reviews. Examples of Hagerty’s past performance are detailed below.

Our Experts: John Hageman

Hagerty’s Deputy Director of Federal Funds, bringing extensive expertise in grants management, financial oversight, and compliance. He has supported states such as Washington and Wyoming, as well as local governments, in strengthening fiscal controls, improving reporting, and ensuring adherence to federal requirements.

Client	Past Performance
State of Nebraska (2019 Floods)	Supported the State in securing HUD approval of \$108 million in CDBG-DR funding following the devastating floods. Beyond assisting with subrecipient contracting and closeout procedures, designed and implemented Statewide compliance systems that standardized monitoring, reporting, and documentation requirements across all

Client	Past Performance
	programs. These systems provided a consistent framework for managing subrecipients, ensuring expenditures were tracked accurately, findings were resolved promptly, and HUD monitoring requirements were met.
Manatee County, Florida (Hurricanes Helene, Milton, and Debby)	Supporting the County in administering approximately \$252 million in CDBG-DR funding, designing grant management processes and subrecipient oversight protocols, including reporting templates and compliance checklists. These tools provide County leadership with real-time visibility into expenditures, compliance issues, and program milestones, ensuring timely and compliant implementation across housing and infrastructure projects.
City of Panama City, Florida (Hurricane Michael)	Supporting the management and reimbursement of federal and state grants including CDBG-DR, FEMA PA, Hazard Mitigation (404/406), FMA, BRIC, Resilient Florida, and State Revolving Fund. Assisted the City in securing nearly \$350 million in disaster grant funding to rebuild a stronger and more resilient community. Outcomes include securing approximately \$100 million in CDBG-DR funding for infrastructure and business district revitalization, supporting the City to become the largest recipient of CDBG-DR home buyout funding (\$5 million), correcting nearly \$10 million in FEMA cost estimate errors, ensuring the State covered the City's FEMA PA cost share (saving nearly \$20 million), and structuring recovery programs so FEMA and CDBG-DR covered 100 percent of \$63.5 million in critical infrastructure projects.

Across these engagements, Hagerty has demonstrated the ability to manage complex federal grants from contracting through closeout while reducing compliance risks and administrative burden.

Firm Qualifications

Grant Management Expertise	Skilled in all phases of CDBG-DR grant management, including subrecipient contracting, compliance monitoring, and closeout.
Compliance Tools Development	Proven record of building templates, checklists, and reporting systems tailored to HUD requirements.
Audit-Ready Documentation	Experienced in ensuring grant files, systems, and reporting withstand HUD and OIG review.
Scalable Capacity	Over 350 professionals nationwide, including grant managers, compliance specialists, and monitoring staff.

Proposed Methodology and Technical Approach

Subrecipient Contracting and Compliance	<ul style="list-style-type: none"> » Facilitate contracting with subrecipients in alignment with HUD and State requirements. » Provide tools and checklists for subrecipient monitoring, documentation, and reporting.
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	<ul style="list-style-type: none"> » Conduct compliance reviews of subrecipient activities, procurement, and recordkeeping.
Grant Implementation and Reporting Tools	<ul style="list-style-type: none"> » Develop standardized reporting templates and dashboards to track subrecipient progress and compliance. » Ensure all reporting aligns with HUD requirements, including preparation of DRGR-compatible templates and QPR submissions. » Support the State in uploading data into DRGR using HUD-provided templates. » Provide ongoing technical assistance to subrecipients to ensure timely, accurate, and complete reporting.
Closeout Activities	<ul style="list-style-type: none"> » Create closeout protocols and checklists to guide subrecipients through grant reconciliation. » Review documentation to confirm compliance and resolve outstanding findings before final HUD approval.
Staffing Plan	<ul style="list-style-type: none"> » Grant Managers with experience administering CDBG-DR grants from contracting through closeout. » Compliance Officers to develop and oversee monitoring and reporting tools. » Technical Assistance Specialists to train and support subrecipients in compliance and reporting activities.
Ensuring Quality and Timeliness	<ul style="list-style-type: none"> » Use of Hagerty’s grant management crosswalks, mapping subrecipient requirements directly to HUD regulations. » QA/QC reviews of subrecipient contracts, reporting tools, and closeout files by senior compliance staff. » Iterative collaboration with DCR staff to align grant management tools with state processes. » Integration of lessons learned from prior HUD audits to strengthen grant management systems.
Ramp-Up Capability	<ul style="list-style-type: none"> » Rapid deployment of grant management experts already engaged in CDBG-DR recovery. » Immediate use of Hagerty’s pre-developed compliance and reporting templates for accelerated mobilization. » Scalable support model to expand as subrecipient contracting, monitoring, and closeout activities increase.

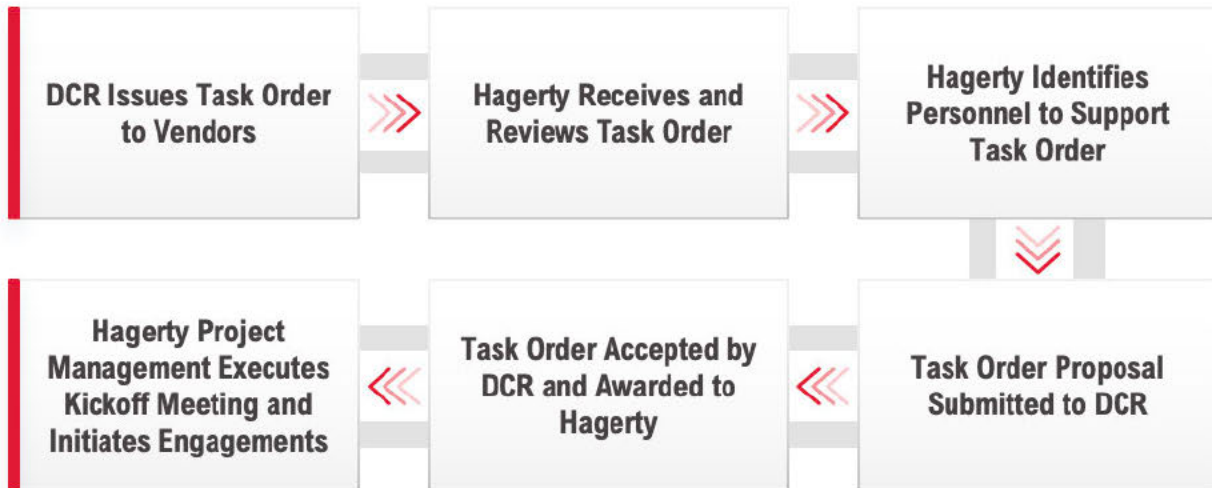
DELIVERABLES

<ul style="list-style-type: none"> » Facilitation of subrecipient contracting, compliance oversight, and closeout activities.
<ul style="list-style-type: none"> » Tools to facilitate subrecipient compliance, documentation, and reporting.

Our Informed Approach to Fulfilling Task Orders

Hagerty understands the need for an agile, client-focused approach to supporting recovery operations. We will utilize a structured process to manage task orders as they are received from DCR. As each order is received, we review requirements against the capabilities of more than 350 full-time professionals and a consulting cadre of more than 1,000 to identify the most skilled professionals for successful delivery.

Task Order Fulfillment Process



At Hagerty, we execute recovery programs by aligning expertise, proven processes, and tailored systems to meet the unique needs of each client and federal funding stream. For DCR, this means engaging stakeholders to ensure proper visibility and oversight; assigning personnel who have successfully managed CDBG-DR and HUD-funded programs; applying processes that have been tested with comparable clients and recoveries; and training DCR personnel while, when appropriate, hiring and subcontracting locally to leverage regional expertise.

Hagerty does not believe in overstaffing projects. Instead, we work in close partnership with our clients to right-size every engagement to **(1)** the requirements of HUD’s CDBG-DR framework and **(2)** the evolving needs of the grantee. This approach results in effective program delivery while ensuring cost savings at all levels of government.

To support DCR, Hagerty will:

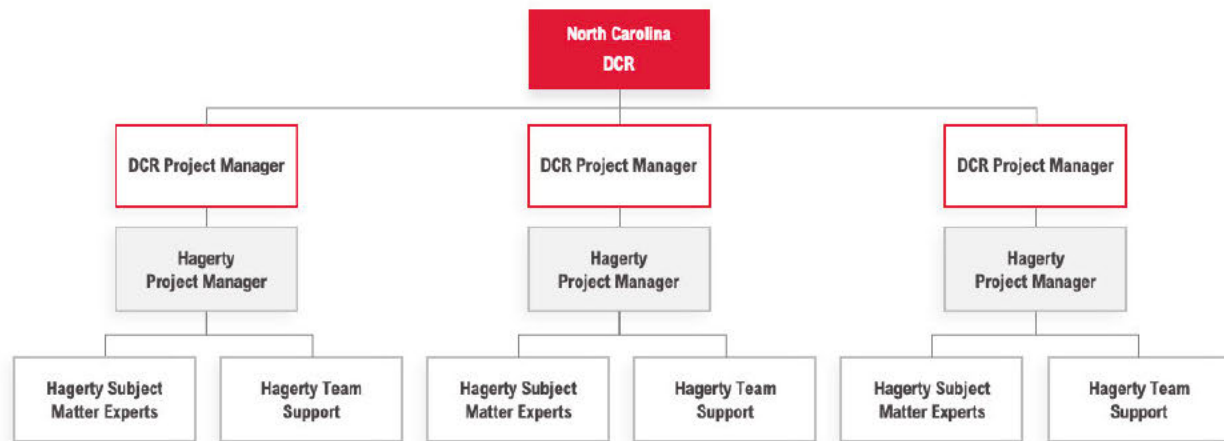
- » Continuously maintain a cadre of professionals with specialized skills in CDBG-DR planning, implementation, and compliance.
- » Establish communication channels and shared situational awareness with DCR leadership and staff.
- » Define operational timelines for each task order engagement to ensure clarity and accountability.
- » Set operational periods and priorities while interpreting HUD policies and requirements to guide agency coordination and implementation.
- » Develop and refine recovery processes and protocols into an effective and efficient structure that accelerates program launch and ensures long-term compliance.

Our Informed Approach to Task Order Staffing.

As Hagerty initiates support to DCR, we recognize that recovery operations may require managing multiple concurrent CDBG-DR task orders. Each task order will be assigned its own dedicated Project Manager and supporting team, ensuring accountability, clear lines of responsibility, and focused delivery.

While individual team members may contribute across task orders, Hagerty’s structured approach to task order management ensures that each engagement receives dedicated oversight and resources tailored to its scope and requirements. This model provides DCR with both flexibility and assurance—flexibility in leveraging expertise across programs, and assurance that each task order will have a clearly defined team committed to its success.

The organizational structure illustrated below reflects how Hagerty will align project leadership, subject-matter expertise, and technical support to deliver CDBG-DR services efficiently, while maintaining direct accountability to the State.



How Hagerty Identifies and Assigns Qualified Personnel

Hagerty’s leadership is directly engaged in staffing decisions for our clients, ensuring that every professional assigned to support DCR is both highly qualified and well-matched to the requirements of each task order. Our approach balances speed, quality, and alignment with federal and state requirements, particularly for CDBG-DR program implementation. When task orders are received, Hagerty’s Recovery Division leadership executes a standardized process to identify and assign personnel:

Process for Identifying and Engaging Qualified Personnel



Hagerty’s Recovery Division includes both full-time employees and pre-vetted cadre professionals who are already trained and experienced in CDBG-DR program delivery. This structure ensures that DCR receives a team that is **ready on day one**, equipped with the knowledge, skills, and expertise necessary to advance recovery programs without delay.

Sources of Personnel to Meet DCR’s Needs Under Task Orders



Once personnel are identified and approved by DCR, those professionals will be immediately onboarded into the engagement, with rapid orientation aligned to Hagerty’s Project Management Plan (PMP). This ensures seamless integration into DCR’s operations and efficient task order execution.

Quality Assurance, Regulatory Compliance, and Oversight

The Hagerty team brings a wealth of expertise across all levels of CDBG-DR program delivery, from federal policy to grantee administration to local implementation, to support DCR’s administration of disaster recovery funds. To ensure accountability and consistency, Hagerty will develop a PMP that applies to all task orders issued under the contract.

The PMP will establish the framework for effective project management and will include:

- » Communication methods for inquiries by client/personnel.
- » Formats for reports and invoices.
- » Contract communications plan(s).
- » Methodology for decision-making and approval procedures.
- » Methods for QA/QC.
- » Remote project execution and anticipated onsite requirements.
- » Expectations and performance standards for Hagerty personnel.

Management Functions

Hagerty’s project management approach is designed to facilitate three core functions.

Transparent Program Oversight	Establish an effective management team working alongside DCR to maintain visibility into the overall project status, coordinate efforts seamlessly, and maintain open lines of communication.
Regulatory Compliance	Ensure project activities meet all applicable local, county, regional, state, and federal rules, regulations, and reporting requirements maintaining strict compliance with CDBG-DR and HUD program standards.
Internal Controls	Implement proven internal control procedures, based on Hagerty’s national experience with federal funds management, to ensure consistent methodology, compliance with State expectations, and alignment with federal oversight requirements.

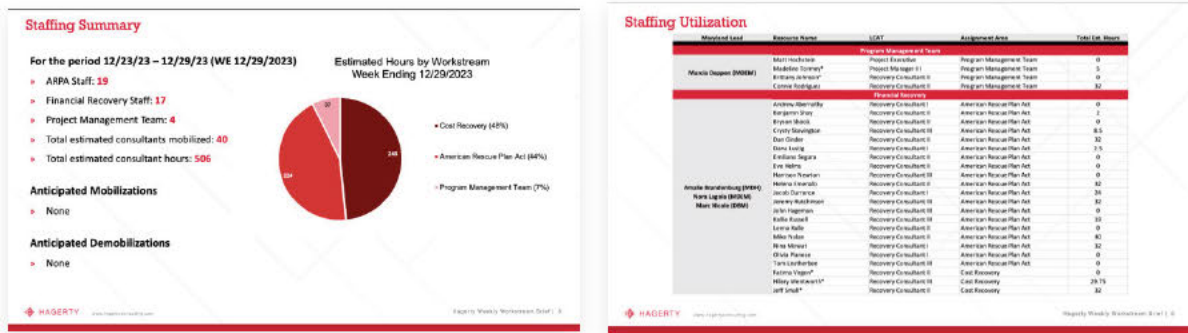
These tactics allow Hagerty to deliver CDBG-DR program management within the required time, budget, and schedule, while maintaining flexibility to adapt to policy changes that may impact implementation.

Project Management Pillars

As task orders are initiated, Hagerty will apply a requirements-driven approach based on three pillars of project management:

- » **Scope:** Regular reporting and meetings with DCR to update on each task order’s scope, including critical path activities, program risks and issues, and reporting aligned with federal and State expectations.
- » **Schedule:** Task-order-specific schedules that are regularly updated to identify tasks ahead of schedule, on schedule, or delayed, ensuring proactive adjustments.
- » **Cost:** Complete transparency on contract and program expenses, including staffing burn rate, resource deployment, and detailed activity-based reporting on grant management and consulting services.

Hagerty's Reporting Process Includes Regular Updates on Staffing and Staff Levels



Program Management Tools and Tactics

Hagerty places an emphasis on flexibility and transparency. Each task order will be managed by a dedicated Project Manager who ensures accountability, while multiple tasks can proceed concurrently under DCR's funding streams. Hagerty's managers will liaise with State leadership to ensure resources shift appropriately as program needs evolve.

To support transparency, Hagerty will employ project management tools and tactics such as:

- » Standardized reporting formats tailored for DCR and HUD compliance.
- » Regular updates on staffing levels and staff deployment.
- » Tools to track, monitor, and report program performance across task orders.

Program Management Tools and Tactics

Project Status Meetings	Bi-weekly meetings with the DCR to provide overall updates and seek feedback on key issues or decision points.
Status Reports	Monthly written reports include updates to project timelines, identification of efficiencies and deficiencies, and the overall budget status.
Project Plans	Visual reports that chart progress along a timeline across multiple workstreams.
Budget Trackers	Fiscal management tool incorporating burn rate, invoice, and payroll tracking that can be adapted for DCR or a subrecipient's use.
Guidance Memos & Frequently Asked Questions	Communication tools to disseminate interpretations and recommendations as they relate to relevant policies and any underlying rules and regulations governing a program.

Quality Assurance in Billing

In alignment with the final requirements of our contract with the State, Hagerty will execute monthly billing. In support of the State, Hagerty will implement the following standard protocols to support billing, and to resolve any billing errors:

- » Hagerty professionals submit their timesheets on a weekly basis for the hours incurred the previous week by Hagerty personnel.
- » Hagerty’s Project Manager reviews timesheets on a weekly basis for compliance against Hagerty’s PMP and the requirements of our contract.
- » If necessary, Hagerty professionals revise their timesheets based on the guidance and feedback of the Project Manager.
- » Timesheets are aggregated on a monthly basis by Hagerty’s Finance and Administration Division.
- » The Hagerty Project Manager reviews and approves the invoice or provides feedback to the Finance and Administration Division for revisions.
- » The final approved invoice is transmitted to the client.

This process helps prevent any issues with invoices and billing prior to those being sent to Hagerty’s clients. Should any billing issues be identified, Hagerty’s Project Manager works with the client to determine the issue, including whether there are any errors associated with the invoice. Hagerty’s Project Manager then works across the contract, with Hagerty’s professionals, and/or the Finance and Administration Division to correct any issues or errors identified. Hagerty will then resubmit corrected invoices to the client.

Our Capacity to Support the State

Hagerty offers the staffing capacity and flexibility required to support DCR’s CDBG-DR programs, with the ability to scale quickly for both short-term and long-term assignments. Our team of more than 350 full-time recovery professionals, along with a pre-vetted cadre of over 1,000 disaster recovery experts, allows us to rapidly deploy staff while maintaining program continuity. For North Carolina specifically, Hagerty already has staff on the ground supporting NCEM and DCR through Hurricane Helene recovery, including Action Plan development, Multifamily Program Policies and Procedures, and ongoing program design. This means DCR can immediately benefit from experienced professionals already embedded in State and local recovery operations.

We operate under large, task-order-based contracts where multiple concurrent missions must be staffed, managed, and completed on time and within budget. This experience demonstrates our ability to adapt to changing priorities and surge resources to meet client needs, an approach we are already applying in North Carolina.

Proven Capacity Through Large-Scale Engagements

North Carolina (Hurricane Helene and Prior Disasters)

Hagerty has been a long-term partner of NCEM, supporting FEMA PA closeout across the State, and expanded our role during Hurricane Helene to include immediate response, interagency task force integration, debris management, and housing recovery. In partnership with DCR, Hagerty authored the HUD-approved CDBG-DR Action Plan under the 2025 Revised Universal Notice and is now leading development

of Multifamily Program Policies and Procedures. At the local level, Hagerty continues to support the City of Asheville with Action Plan development, financial certifications, and program design. These engagements required Hagerty to mobilize and scale multiple teams across both State and local missions, demonstrating our ability to balance concurrent projects while sustaining program continuity.

California Governor’s Office of Emergency Services

Hagerty’s work with the California Governor’s Office of Emergency Services (Cal OES) is managed under a unified Project Management Office (PMO). Within this structure, Hagerty simultaneously **(1)** mobilized a dedicated team to support the State’s \$7.7 billion Hazard Mitigation Assistance mission; **(2)** mobilized a separate team to focus on \$6 billion in legacy recovery grant closeout; and **(3)** maintained teams addressing wildfire and pandemic recovery operations. Each team operated under the unified PMO, which provided quality assurance and staffing oversight while allowing Hagerty to scale personnel across multiple missions.

City of Panama City (Hurricane Michael)

Following Hurricane Michael, Hagerty was asked to provide the City with comprehensive recovery planning support under the Rebuild Panama City initiative, in addition to FEMA PA and HMGP program management. This required Hagerty to scale a new team with skills outside of traditional disaster recovery while coordinating with existing recovery staff. Hagerty successfully mobilized these teams, advancing concurrent missions while maintaining program management discipline. To date, Hagerty’s staffing model has helped the City secure more than \$380 million in disaster grant funding.

State of Maryland (COVID-19 Response and Recovery)

Hagerty’s engagement with Maryland quickly expanded from initial response support to managing FEMA PA cost recovery for both Maryland Department of Emergency Management (MDEM) and Maryland Department of Health (MDH), supporting mass vaccination site operations, and advising Department of Budget Management (DBM) on State and Local Fiscal Recovery Funds (SLFRF). To manage these concurrent missions, Hagerty established a unified PMO and mobilized separate dedicated teams for each work stream. This structure allowed staff to be shifted and scaled as priorities evolved while maintaining oversight, accountability, and compliance across all programs.

New York City (Hurricane Sandy)

As NYC’s \$15 billion FEMA PA recovery advanced into post-obligation phases, Hagerty scaled its staffing model to establish specialized Project Conformance and Closeout Teams. These teams supported the NYC OMB and NYC agencies by monitoring contractor billing, addressing compliance requirements, and ensuring timely closeout. By mobilizing distinct staffing units under a shared program management structure, Hagerty ensured the City could maintain compliance while advancing recovery timelines.

Through these engagements, including our direct, ongoing work in North Carolina, Hagerty has proven our ability to manage large, complex, and concurrent recovery programs while scaling staff to meet evolving demands. This experience provides DCR with confidence that Hagerty can surge capacity for immediate priorities while sustaining long-term recovery operations.

Our Personnel Capabilities Align to the State’s Needs

Hagerty recognizes that the success of North Carolina’s CDBG-DR program depends on a staffing approach that is both flexible and responsive to evolving program needs. Our proposed staffing model is designed around a hybrid approach, combining the efficiency of remote support with the reliability of on-site staff. This ensures we deliver consistent coverage and the specialized expertise required, while also meeting DCR’s expectations for in-person roles whenever requested.

Each task outlined in this proposal is staffed with a blend of subject-matter experts, compliance professionals, and program specialists who have direct HUD experience. Where needed, we will embed staff onsite to provide immediate program support, build trust with stakeholders, and strengthen collaboration with DCR. At the same time, our scalable remote team allows us to surge resources rapidly, providing cost-effective coverage for emerging challenges without sacrificing quality or compliance.

By integrating this hybrid staffing approach into every task, Hagerty ensures that North Carolina receives the right expertise in the right place at the right time, balancing efficiency, accountability, and resilience in program delivery. The following provides an overview of the key personnel proposed to the State. This includes the alignment of personnel to the Task Order Categories where Hagerty will support DCR. Aligned to the State’s request, the following identifies two personnel per position for key labor categories.

Proposed Staffing by Task

Task	Service Area	Project Executive / Subject Matter Expert	Program Manager	Grants Management Personnel
1	Development of Policies, Procedures, SOPs	Stan Gimont David Bennett	Leah Kessler Laura Munafo	Ashley Napier Phil Betito
2	Financial Compliance, Oversight, Fraud Prevention	Stan Gimont David Bennett	Chris Delgado Phil Betito	Nathan Beam Madeline Stoddart
3	Duplication of Benefits Compliance	Brock Long Stan Gimont	Phil Betito Laura Munafo	Julia Zachgo Ashley Napier
4	Procurement Compliance and Monitoring	John Hageman David Bennett	Phil Betito Chris Delgado	Not Applicable for This Category

Task	Service Area	Project Executive / Subject Matter Expert	Program Manager	Grants Management Personnel
5	Claims, Appeals, and Case Reviews	Stan Gimont John Hageman	Ashley Napier Chris Delgado	Nathan Beam Parker Harrison
6	Action Plan Development and Amendments	Stan Gimont David Bennett	Laura Munafo Leah Kessler	Nathan Beam Ashley Napier
7	Needs Assessment, Market Analysis, and GeoSpatial Support	Stan Gimont David Bennett	Laura Munafo Doug Ongie	Julia Zachgo Nathan Beam
8	Program Performance Monitoring and Evaluation	Stan Gimont John Hageman	Ashley Napier Leah Kessler	Nathan Beam Julia Zachgo
10	Audit Readiness and Monitoring Support	Stan Gimont John Hageman	Laura Munafo Ashley Napier	Julia Zachgo Nathan Beam
12	Training, Technical Assistance, and Capacity Building	Stan Gimont Amelia Muccio	Leah Kessler Laura Munafo	Parker Harrison Julia Zachgo
14	Communications, Public Information, Outreach Support	Jessi Widhalm Brock Long	Laura Munafo Ashley Napier	Julia Zachgo Madeline Stoddart
15	Grant Management	Brock Long Amelia Muccio	Laura Munafo Leah Kessler	Not Applicable for This Category

5. Resumes and Bios

The following provides the resumes of the proposed Hagerty professionals for the key positions identified in the previous section. For most categories, Hagerty defines key personnel to include individuals serving as the Project Executive / Subject Matter Expert, the Program Manager, and Grants Management Personnel. Hagerty will provide resumes and biographical information to DCR on a task order basis for those personnel directly supporting the task order and the State.

Resumes: Task 1

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » BA, Economics and German Language, George Mason University, 1989
- » Graduate Credit Hours (Master of Divinity, 34), Wesley Theological Seminary, 1993

Trainings/Certifications

- » Project Management Certificate, Cornell University, March 2022
- » Certified HOME Program Specialist, 2009
- » Public Housing Manager, 1996
- » Housing Quality Standards (HUD HQS), 1995

Relevant Highlights

- » Community Development Block Grants for Disaster Recovery (CDBG-DR), Mitigation (CDBG-MIT), and Coronavirus (CDBG-CV)
- » Financial and Programmatic Auditing of Federal Grant Subrecipients
- » Policy Development
- » Program Management
- » Affordable Housing Program Implementation and Administration
- » LIHTC
- » Economic Development
- » Infrastructure Project Management

Professional Biography

Mr. David Sidney Bennett is a disaster recovery management professional with over 33 years of experience providing housing-specific programming. In his work, he routinely provides technical assistance under the United States Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) Disaster Recovery (-DR), Mitigation (-MIT), and Coronavirus (-CV); Community Compass; and Enterprise Community Partners programs to grant recipients and subrecipients, including within the State of Florida. In recent years, Mr. Bennett has served as a project/grant manager and general technical assistance resource supporting CDBG, CDBG-DR, CDBG-MIT, CDBG-CV; *American Rescue Plan Act*; Economic Development Administration (EDA), Community Services Block Grant (CSBG), Section 108 loan securitization; HOME Investment Partnerships, Section 811; and Low-Income Housing Tax Credit (LIHTC) monitoring for both fiscal and programmatic compliance (including complex multi-layered funded projects). Mr. Bennett has developed CDBG program manuals, environmental review templates, and subrecipient monitoring forms that HUD used as models for other entitlement communities and participating jurisdictions.

Relevant Professional Experience

Senior Subject Matter Expert | Community Development Block Grant – Disaster Recovery Portfolio Oversight | Manatee County, FL | Hagerty Consulting, Inc.

- » Provided SME technical assistance to key Manatee County CDBG-DR Action Plan/Unmet Needs Assessment writing/analysis phase
- » Reviewed, edited and provided guidance on Action Plan envisioned project specific policies and procedures that are being developed.

Project Executive | Action Plan and Unmet Needs Assessment | St. Louis County, Missouri | Hagerty Consulting, Inc.

- » Served as liaison between County and Hagerty Consulting on project and scope. Provided key project staff with subject matter expertise (SME) and technical assistance to include review/edit of entire Action Plan and documents supporting the Financial Certifications submission to HUD. Provided the County with general programmatic SME technical assistance including distilling and understanding federal statutory requirements.

David Sidney Bennett

Project Executive/Subject Matter Expert



Senior Subject Matter Expert | Lee County, Florida, Recovery and Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided review of and comment on featured projects to be submitted by Hagerty Consulting clients including Cape Coral and Estero Beach that are subrecipient partners to Lee County.
- » Ensured that projects were compliant with Lee County award expectations and met federal crosscutting statutory compliance

Senior Subject Matter Expert | Panama City Beach, Florida, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided SME technical assistance primarily in the areas of labor standards compliance.

Senior Subject Matter Expert | Detroit-Dearborn, Michigan, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » As Hagerty Consulting's role providing HUD Community Compass Technical Assistance to these two cities, provided review of single family housing programmatic standards applicable to affordable housing programs and issues resolutions to client.

Project Advisor | Montgomery County, Texas, San Jacinto Watershed Infrastructure Project | Hagerty Consulting, Inc.

- » Directly serving as key staff on \$60M CDBG-MIT Montgomery County San Jacinto Watershed Infrastructure Project following needs identified by County and State government.

Project Advisor | Asheville, North Carolina, Post-Hurricane Helene Disaster Response and Recovery | Hagerty Consulting, Inc.

- » Assisted in completing an Action Plan, Financial Certifications, and various procedures and policies for the State of North Carolina resulting from Hurricane Helene.

Program Manager/Lead Subject Matter Expert | Lee County, Florida, Community Development Block Grant – Disaster Recovery Oversight Management | HGA

- » Led a team of professionals embedded in the Lee County, Florida Department of Strategic Resources and Government Affairs that assist the County in planning, designing, and implementing programs funded under the \$1.1 billion allocation.
- » Maintained funding compliance, timely and appropriate expenditure of funds, procurement of professional and construction services, and maintained all aspects of compliance.
- » Drafted and assisted County in developing policies to govern the allocation (infrastructure, planning, public services, multi/single family housing reconstruction/rehabilitation/new construction), notice of funding opportunity availability to subrecipients, subrecipient agreements, internal processes and financial management, and ensure full statutory regulatory compliance.
- » Served as lead subject matter expert on all programmatic and regulatory compliance issues to both HGA and County staff.
- » Assisted County, as needed, with Action Plan Amendments and Substantial Amendments, and during federal, state, and self monitoring visits/audits.

David Sidney Bennett

Project Executive/Subject Matter Expert



Regulatory Compliance Officer | Puerto Rico Department of Housing, Oversight Management Services for United States Department of Housing and Urban Development Mitigation Infrastructure Programs | HGA

- » Oversaw project compliance with applicable federal, state, and local regulations.
- » Ensured compliance with required National Objectives; cross-cutting guides; and the *Davis Bacon Act*, Section 3, Urban Redevelopment Authority, and Environmental Review requirements.
- » Evaluated proposed activities for eligibility under federal program guidelines.
- » Served as a subject matter expert on healthcare set-aside projects and billion-dollar transportation projects.

Technical Advisor | Department of Housing and Urban Development Community Compass and Enterprise Community Foundation, Technical Assistance | HGA

- » Developed and presented technical assistance training for HUD CDBG-DR, CDBG Entitlement, and CDBG-MIT grant recipients and subrecipients.
- » Presented webinar synchronous training to 78 subrecipient municipios and multiple state agencies in Puerto Rico.
- » Provided technical assistance to date in the areas of Environmental Review Records, Economic Development, *Uniform Relocation Assistance and Real Property Acquisition Act*, Financial Management, Subrecipient Management, Section 504/ADA, Section 3 and Minority and Women-Owned Business Enterprises, *Davis Bacon* and Related Acts Labor compliance, Procurement, development of Systems of Record, and Disaster Recovery Grants Reporting System Reporting and Compliance.

Program Policy Subject Matter Expert | Texas Back in Business Economic Revitalization Program | Texas General Land Office | HGA

- » Implemented policy and program delivery protocols for the Economic Revitalization Program , which serves more than 2,500 business applicants in economic stabilization and recovery efforts following Hurricane Harvey.
- » Worked in tandem with the General Land Office (GLO) and imbedded contract staff to develop eligibility and underwriting processes to guide staff in evaluating applications and providing grant funding to eligible businesses in 49 most impacted and distressed counties.
- » Served as lead policy staff for GLO leadership, providing expert guidance on federal policy and best practices on this novel economic development undertaking that has not previously been provided under this model in the CDBG-DR space.

Employment History

Hagerty Consulting, Inc., CDBG-DR Practice Leader - Recovery, 2024

HGA, Program Manager and Senior Consultant, 2015 to 2024

Institute for Building Technology and Safety, Senior Manager – Community Development Services, 2014 to 2015

Arlington County Government, Federal Programs Coordinator, 2008 to 2014

Loudoun County Government, Manager of Strategic Initiatives and Communications, 2006 to 2008

Fairfax County Government, Management Analyst II, 2004 to 2006

Fairfax County Government, Housing Community Developer, 1994 to 2004

Education

- » Master of Public Policy, Harvard Kennedy School, 2023
- » BA, Public Policy, University of Chicago, 2017

Relevant Highlights

- » Federal grant management and administration, including experience with the DRGR
- » CDBG-DR and CDBG-MIT administration
- » Experience with DRGR

Professional Biography

Ms. Leah Kessler is a disaster recovery and community development professional with specialized experience in climate resiliency. As a Presidential Management Fellow, she supported multiple offices within the United States Department of Housing and Urban Development (HUD) where she supported disaster recovery, guided recipients of the Community Development Block Grant-Disaster Recovery (CDBG-DR), served as a subject matter expert for the Disaster Recovery Grant Reporting (DRGR) System, and provided technical assistance for CDBG applicants and recipients. In addition, she has supported the National Oceanic and Atmospheric Administration (NOAA) with spearheading an equitable grantmaking initiative to increase access to climate resilience and adaptation grants, improving agency grantmaking efficiency, and integrating equity into NOAA-wide policies.

Relevant Professional Experience

Recovery Consultant | Montgomery County, Texas, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided technical support for Montgomery County's approximate \$70 million CDBG-Mitigation (-MIT) grant program.
- » infrastructure initiative, contributing to the planning, design, and implementation of mitigation and resilience projects.
- » Authored comprehensive policies and procedures for Section 3, *Davis-Bacon Act*, *Uniform Relocation Assistance and Real Property Acquisition Policies Act* (URA), and Environmental Review Requirements, ensuring federal compliance and streamlining program operations.
- » Provided strategic guidance on Section 3 and URA implementation, advising County leadership on best practices to minimize displacement and optimize community benefits.

Management and Program Analyst | United States of Department of Housing and Urban Development, Office of Disaster Recovery

- » Advised department leadership on housing policy and community development strategies, shaping affordable housing solutions that expanded access for low- and moderate-income residents.

Leah Kessler

Program Manager



- » Oversaw and optimized federally funded disaster recovery and resilience grants through CDBG-DR, improving fund allocation and compliance while strengthening state and local governments' ability to implement risk mitigation and long-term recovery strategies.
- » Led regulatory and policy analysis, communicating complex federal programmatic guidelines, and advising New York State grant recipients on CDBG-DR implementation to maximize community impact.
- » Provided hands-on technical assistance to grantees, guiding them through federal regulations, conducting desk reviews and audits, and recommending corrective actions as needed.
- » Served as a subject matter expert on the DRGR System, a national database for managing and tracking CDBG-DR grants, ensuring compliance and effective grant oversight.

Special Assistant and Equity Advisor | National Oceanic and Atmospheric Administration (on detail for Department of Housing and Urban Development)

- » Spearheaded NOAA's equitable climate funding initiative, increasing access to climate resilience and adaptation grants for frontline communities. Developed a 100-page guide, user-friendly grant portal, and bias awareness training, ensuring federal funding supported equitable environmental outcomes.
- » Led the creation of NOAA's first-ever Organizational Values—Inclusion, Innovation, and Integrity—securing buy-in from 12,000 employees to integrate these values into agency culture and operations.
- » Developed NOAA's Equity Framework and Equitable Climate Services Action Plan, embedding equity across the agency's funding, programs, and operations.

Management and Program Analyst/Presidential Management Fellow | Department of Housing and Urban Development, Office of Block Grant Assistance

- » Advised entitlement communities on effective management and implementation of CDBG funds, ensuring compliance with federal regulations while maximizing funding impact for community development initiatives.
- » Led data analysis and impact assessments using PowerBI and Microsoft Access, generating insights that improved program evaluation and informed data-driven decision-making for senior leadership.
- » Evaluated and recommended applications for HUD's Pathways to Removing Obstacles to Housing program, supporting local governments reducing barriers to and expanding the supply of affordable housing.
- » Provided expert guidance on the Integrated Disbursement and Information System, a national database for administering and reporting on CDBG, ensuring proper fund management and regulatory compliance.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2025 to Present

Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2024 to 2025

National Oceanic and Atmospheric Administration (on detail), Special Assistant and Equity Advisor (Presidential Management Fellow, 2024

Leah Kessler

Program Manager



Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2023 to 2024

Harvard's Center for Public Leadership, Research Assistant, 2022 to 2023

Alaska Venture Fund, Consultant, 2022 to 2023

City of Anaheim, Mayoral Transition Term Fellow, January 2023

Office of Governor DeWine, Michael S. Dukakis Summer Fellow, June 2022 to August 2022

HeartShare St. Vincent's Services, Case Planner/2019 Children's Corps Fellow, 2019 to 2021

The Harman Firm, LLP, Law Clerk/Paralegal, 2017 to 2019

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



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- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Grants Management Specialist



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Education

- » Master of Science, Enterprise Risk Management
Focus: Strategic & Operational Risks
Columbia University, 2017
- » Master of Public Administration,
John Jay College, 2013
- » Bachelor of Science, Legal Studies
Minor: Government
John Jay College, 2007

Relevant Highlights

- » Authored the Unmet Needs/Match Funding sections of the United States Virgin Island's 4-Tranche Access Point approved by HUD for \$1.8 billion in 2018
- » Completed successful risk assessments and monitoring of nearly a dozen county and city jurisdictions in CA receiving subrecipient funding from the 2019 Wildfires
- » Designed and implemented streamlined HUD-compliant vendor billing processes
- » Improved transparency in financial reporting systems through conducting comprehensive analyses on long-term disbursement metrics, lifecycle tendencies, and compliance checks

Professional Biography

Mr. Philip Betito is a grants management and disaster recovery professional with 17 years of progressive experience. Since 2019, he has served Hagerty Consulting, Inc. (Hagerty) as a Disaster Recovery Consultant assisting local and state municipalities in managing their federal grant funding. With an advanced understanding of HUD Community Development Block Grant – Disaster Recovery (CDBG-DR), Federal Emergency Management Agency (FEMA) Public Assistance (PA), Individual Assistance (IA), and hazard mitigation, Mr. Betito has assisted clients in managing their recovery programs to ensure efficient and impactful outcomes. From program design to program implementation, through to program closeout, he bears experience in several phases of the disaster recovery program lifecycle as it pertains to compliance and monitoring.

Relevant Professional Experience

Disaster Recovery Consultant | Manatee County, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Assisted in the development of the CDBG-DR Action Plan; integrated federal, state, and local regulatory frameworks to define program objectives, eligible activities, and allocation methodologies; ensured alignment with unmet needs assessments and citizen participation standards.

Disaster Recovery Consultant | State of North Carolina | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.
- » Managed citizen participation feedback to the state's CDBG-DR Action Plan.

Disaster Recovery Consultant | City of Asheville, North Carolina, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.

Philip Betito

Grants Management Specialist



Disaster Recovery Consultant | St. Louis County, Missouri, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed Economic Revitalization program within the CDBG-DR Action Plan; identified post-storm impacts to the County including financial needs to be potentially satisfied by CDBG-DR funding.

Disaster Recovery Consultant | California Department of Housing and Community Development, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Provided the California Department of Housing and Community Development with policy and design support for the recovery program's Monitoring & Compliance procedures
- » Created risk assessment procedures for assessing sub-recipient entities pre and post allocation of grant funding
- » Assisted in drafting grantee policies pertaining to sub-recipient monitoring, including the development of standard operating procedures governing both desk reviews and onsite monitoring
- » Tailored risk assessment procedures based on specific sub-program needs (Owner-Occupied Rehabilitation, Multi-family Housing, and Infrastructure)
- » Conducted due diligence reviews on subrecipient jurisdictions receiving CDBG-DR grant allocations
- » Developed housing recovery strategies for impacted counties including Sonoma, Ventura, Butte, Mendocino, Yuba, Napa, Santa Barbara, and Los Angeles counties

Disaster Recovery Consultant | New York City Mayor's Office of Management and Budget, Disaster Recovery Support | Hagerty Consulting, Inc.

- » Led agency support effort in creating/completing CDBG-DR Financial Management Grant Compliance Certification for Hurricane Ida.

Disaster Recovery Consultant | Texas General Land Office | Hagerty Consulting, Inc.

- » Provided design support for programmatic CDBG-DR procedures including financial procedures, record management, project eligibility, and community outreach/marketing plans.
- » Supported General Land Office (GLO) with establishing recovery support parameters for its Housing program implementation in the City of Houston and its surrounding counties.
- » Created applicant eligibility procedures to meet GLO program requirements, as well as HUD CDBG-DR regulations.

Employment History

Hagerty Consulting, Inc., Recovery Manager, 2019 to Present

Witt O'Brien's, Consultant, Community Development Block Grant-Disaster Recovery Subject Matter Expert, 2018 to 2019

Winsor Consulting Group, Consultant, 2015 to 2018

Eltman Eltman & Cooper PC, Compliance Associate, 2012 to 2014

Rivkin Radler LLP, Paralegal, 2008 to 2012

Resumes: Task 2

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » BA, Economics and German Language, George Mason University, 1989
- » Graduate Credit Hours (Master of Divinity, 34), Wesley Theological Seminary, 1993

Trainings/Certifications

- » Project Management Certificate, Cornell University, March 2022
- » Certified HOME Program Specialist, 2009
- » Public Housing Manager, 1996
- » Housing Quality Standards (HUD HQS), 1995

Relevant Highlights

- » Community Development Block Grants for Disaster Recovery (CDBG-DR), Mitigation (CDBG-MIT), and Coronavirus (CDBG-CV)
- » Financial and Programmatic Auditing of Federal Grant Subrecipients
- » Policy Development
- » Program Management
- » Affordable Housing Program Implementation and Administration
- » LIHTC
- » Economic Development
- » Infrastructure Project Management

Professional Biography

Mr. David Sidney Bennett is a disaster recovery management professional with over 33 years of experience providing housing-specific programming. In his work, he routinely provides technical assistance under the United States Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) Disaster Recovery (-DR), Mitigation (-MIT), and Coronavirus (-CV); Community Compass; and Enterprise Community Partners programs to grant recipients and subrecipients, including within the State of Florida. In recent years, Mr. Bennett has served as a project/grant manager and general technical assistance resource supporting CDBG, CDBG-DR, CDBG-MIT, CDBG-CV; *American Rescue Plan Act*; Economic Development Administration (EDA), Community Services Block Grant (CSBG), Section 108 loan securitization; HOME Investment Partnerships, Section 811; and Low-Income Housing Tax Credit (LIHTC) monitoring for both fiscal and programmatic compliance (including complex multi-layered funded projects). Mr. Bennett has developed CDBG program manuals, environmental review templates, and subrecipient monitoring forms that HUD used as models for other entitlement communities and participating jurisdictions.

Relevant Professional Experience

Senior Subject Matter Expert | Community Development Block Grant – Disaster Recovery Portfolio Oversight | Manatee County, FL | Hagerty Consulting, Inc.

- » Provided SME technical assistance to key Manatee County CDBG-DR Action Plan/Unmet Needs Assessment writing/analysis phase
- » Reviewed, edited and provided guidance on Action Plan envisioned project specific policies and procedures that are being developed.

Project Executive | Action Plan and Unmet Needs Assessment | St. Louis County, Missouri | Hagerty Consulting, Inc.

- » Served as liaison between County and Hagerty Consulting on project and scope. Provided key project staff with subject matter expertise (SME) and technical assistance to include review/edit of entire Action Plan and documents supporting the Financial Certifications submission to HUD. Provided the County with general programmatic SME technical assistance including distilling and understanding federal statutory requirements.

David Sidney Bennett

Project Executive/Subject Matter Expert



Senior Subject Matter Expert | Lee County, Florida, Recovery and Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided review of and comment on featured projects to be submitted by Hagerty Consulting clients including Cape Coral and Estero Beach that are subrecipient partners to Lee County.
- » Ensured that projects were compliant with Lee County award expectations and met federal crosscutting statutory compliance

Senior Subject Matter Expert | Panama City Beach, Florida, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided SME technical assistance primarily in the areas of labor standards compliance.

Senior Subject Matter Expert | Detroit-Dearborn, Michigan, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » As Hagerty Consulting's role providing HUD Community Compass Technical Assistance to these two cities, provided review of single family housing programmatic standards applicable to affordable housing programs and issues resolutions to client.

Project Advisor | Montgomery County, Texas, San Jacinto Watershed Infrastructure Project | Hagerty Consulting, Inc.

- » Directly serving as key staff on \$60M CDBG-MIT Montgomery County San Jacinto Watershed Infrastructure Project following needs identified by County and State government.

Project Advisor | Asheville, North Carolina, Post-Hurricane Helene Disaster Response and Recovery | Hagerty Consulting, Inc.

- » Assisted in completing an Action Plan, Financial Certifications, and various procedures and policies for the State of North Carolina resulting from Hurricane Helene.

Program Manager/Lead Subject Matter Expert | Lee County, Florida, Community Development Block Grant – Disaster Recovery Oversight Management | HGA

- » Led a team of professionals embedded in the Lee County, Florida Department of Strategic Resources and Government Affairs that assist the County in planning, designing, and implementing programs funded under the \$1.1 billion allocation.
- » Maintained funding compliance, timely and appropriate expenditure of funds, procurement of professional and construction services, and maintained all aspects of compliance.
- » Drafted and assisted County in developing policies to govern the allocation (infrastructure, planning, public services, multi/single family housing reconstruction/rehabilitation/new construction), notice of funding opportunity availability to subrecipients, subrecipient agreements, internal processes and financial management, and ensure full statutory regulatory compliance.
- » Served as lead subject matter expert on all programmatic and regulatory compliance issues to both HGA and County staff.
- » Assisted County, as needed, with Action Plan Amendments and Substantial Amendments, and during federal, state, and self monitoring visits/audits.

David Sidney Bennett

Project Executive/Subject Matter Expert



Regulatory Compliance Officer | Puerto Rico Department of Housing, Oversight Management Services for United States Department of Housing and Urban Development Mitigation Infrastructure Programs | HGA

- » Oversaw project compliance with applicable federal, state, and local regulations.
- » Ensured compliance with required National Objectives; cross-cutting guides; and the *Davis Bacon Act*, Section 3, Urban Redevelopment Authority, and Environmental Review requirements.
- » Evaluated proposed activities for eligibility under federal program guidelines.
- » Served as a subject matter expert on healthcare set-aside projects and billion-dollar transportation projects.

Technical Advisor | Department of Housing and Urban Development Community Compass and Enterprise Community Foundation, Technical Assistance | HGA

- » Developed and presented technical assistance training for HUD CDBG-DR, CDBG Entitlement, and CDBG-MIT grant recipients and subrecipients.
- » Presented webinar synchronous training to 78 subrecipient municipios and multiple state agencies in Puerto Rico.
- » Provided technical assistance to date in the areas of Environmental Review Records, Economic Development, *Uniform Relocation Assistance and Real Property Acquisition Act*, Financial Management, Subrecipient Management, Section 504/ADA, Section 3 and Minority and Women-Owned Business Enterprises, *Davis Bacon* and Related Acts Labor compliance, Procurement, development of Systems of Record, and Disaster Recovery Grants Reporting System Reporting and Compliance.

Program Policy Subject Matter Expert | Texas Back in Business Economic Revitalization Program | Texas General Land Office | HGA

- » Implemented policy and program delivery protocols for the Economic Revitalization Program, which serves more than 2,500 business applicants in economic stabilization and recovery efforts following Hurricane Harvey.
- » Worked in tandem with the General Land Office (GLO) and imbedded contract staff to develop eligibility and underwriting processes to guide staff in evaluating applications and providing grant funding to eligible businesses in 49 most impacted and distressed counties.
- » Served as lead policy staff for GLO leadership, providing expert guidance on federal policy and best practices on this novel economic development undertaking that has not previously been provided under this model in the CDBG-DR space.

Employment History

Hagerty Consulting, Inc., CDBG-DR Practice Leader - Recovery, 2024

HGA, Program Manager and Senior Consultant, 2015 to 2024

Institute for Building Technology and Safety, Senior Manager – Community Development Services, 2014 to 2015

Arlington County Government, Federal Programs Coordinator, 2008 to 2014

Loudoun County Government, Manager of Strategic Initiatives and Communications, 2006 to 2008

Fairfax County Government, Management Analyst II, 2004 to 2006

Fairfax County Government, Housing Community Developer, 1994 to 2004

Education

- » MS, Finance, Pace University, 2016
- » BA, Philosophy, Minor: Political Science, Rutgers University, 2007

Training and Certifications

- » FEMA courses: IS-01012, IS-1001, IS, 01000, IS-01005, IS-01006, IS-01007, IS-01008, IS-01009, IS-01014, IS-01015, IS-01018

Relevant Highlights

- » 10+ years as Public Sector consultant
- » Directly manage FEMA's 428 Public Assistance Alternative Procedures (PAAP) grants for NYC agencies in over \$5 billion
- » Financial management in over \$8 billion in COVID-19 for PPE-related costs for New York City
- » Financial management and overall policy support in over \$6 billion in CDBG-DR grants for four states and one US Territory

Professional Biography

Mr. Christopher Delgado serves as a Manager in the Recovery Division for Hagerty Consulting, Inc. (Hagerty) with over 10 years of experience in serving public sector clients in navigating the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, Hazard Mitigation Grant Program (HMGP), Novel Coronavirus (COVID-19) funding programs, and Community Development Block Grant, Disaster Recovery (CDBG-DR) under the (US) Department of Housing and Urban Development (HUD).

Mr. Delgado has submitted and received over \$300 million in FEMA PA and over \$100 million in COVID-19 grant reimbursements for personal protective equipment (PPE)-related costs for New York City (NYC). Mr. Delgado has helped guide the recovery efforts for Manatee County, State of North Carolina, Saint Louis, City of Panama City Beach, Texas General Land Office (GLO), and the California Department of Housing and Community Development (HCD) by providing fiscal and policy support.

Prior to joining Hagerty, Mr. Delgado helped the US Virgin Islands (USVI) Housing Finance Authority by successfully submitting the territories action plan and receiving approval on the USVI's four Tranches in over \$1.8 billion. In addition, he has helped the New York State Governor's Office of Storm Recovery by providing financial oversight and grant management support for Hurricane Sandy Recovery.

Relevant Professional Experience

Certification Checklists Lead & Policy Development | Manatee County, Hurricanes Debby, Helene, and Milton Recovery | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements and the Citizen Participation Plan in accordance with HUD regulations, ensuring timely and accurate submissions.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.
- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Christopher Delgado

Program Manager



Subject Matter Expert | New York City Mayor's Office of Management and Budget, Hurricane Sandy & COVID-19 Recovery | Hagerty Consulting, Inc.

- » Provided financial oversight and management on the \$10 billion Sandy FEMA PA, \$8 billion COVID-19, \$368 million Federal Highway Administration (FHWA), and \$310 million Federal Transit Administration (FTA) grants awarded to NYC.
- » Manage, update, and adjust financial data in the Office of Management and Budget's (OMB's) grants management system.
- » Provided subject matter expertise in reconciling expenditures and submitting progress and closeout payments for over \$400 million in reimbursements.
- » Directly manage FEMA's 428 PAAP grants for NYC agencies over \$5 billion.
- » Collaborated with OMB Agency Task Forces in setting up revenue structures for anticipated FEMA, FHWA, FTA, and COVID-19 revenue, and ensure expense and revenue consistency throughout the fiscal reconciliation process.
- » Analyzed, forecasted, reported, and presented financial data to senior management, OMB, and city agencies.
- » Assisted the Closeout Management Team in the financial reconciliation process.
- » Evaluated Project Worksheets (PWs) to determine grant eligibility for agency expenditures.
- » Conducted fiscal analysis on grant obligations, PW expenditures, and earned revenue.

Closeout Specialist | Florida Division of Emergency Management, COVID-19 Recovery | Hagerty Consulting, Inc.

- » Coordinated the closeout process for large-scale Covid-19 projects, ensuring compliance with federal regulations and timely submission of required documentation.
- » Reviewed and validated PWs, invoices, and supporting documentation to confirm eligibility and proper cost allocation.
- » Liaised with applicants, state agencies, and FEMA representatives to resolve discrepancies and facilitate grant reconciliation.
- » Managed data tracking systems to monitor project status, financial progress, and audit readiness.
- » Prepared closeout packages and final reports for submission to FEMA, ensuring completeness and accuracy.

Subject Matter Expert | State of North Carolina, Tropical Storm Helene Recovery | Hagerty Consulting, Inc.

- » Provided support in developing the Action Plan for the \$1.4B HUD grant awarded to the State of North Carolina.
- » Coordinated the preparation and submission of required reports, ensuring adherence to HUD's compliance standards and deadlines.
- » Reviewed and analyzed grant documentation to identify discrepancies and implement corrective actions for compliance improvements.
- » Reviewed unmet needs data and incorporated findings into the Action Plan to ensure effective allocation of resources and alignment with HUD's priorities.

Certification Checklists Lead & Policy Development | St. Louis County, Missouri Severe Storms and Flooding | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements in accordance with HUD regulations, ensuring timely and accurate documentation.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.

Christopher Delgado

Program Manager



- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Senior Specialist | City of Panama City Beach, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Supported the City in the infrastructure grant application writing, research, and guidance process.

Recovery Program Specialist | Texas General Land Office, Hurricane Harvey Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$3.2 billion grant for the Homeowner Assistance Program (HAP) from HUD awarded to GLO.
- » Cross walked both the City of Houston's and the GLO's HAP guidelines and implementation forms.
- » Developed the Affirmative Fair Housing Marketing Plan and eligibility policies and procedures.
- » Provided guidance on complaints and appeals, and temporary relocation policies and procedures.
- » Drafted waivers and memos for the HAP Program.

Senior Grant Manager | California Department of Housing and Community Development, Wildfires, Flooding, Mudflows, and Debris Flows Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$48 million grant for the Owner-Occupied Rehabilitation and Reconstruction Program from HUD awarded to HCD.
- » Provided guidance on the CDBG-DR Risk Assessment and Monitoring Plan.
- » Developed cross cutting reporting requirements, forms, templates, policies and procedures needed for grant compliance such as Labor Compliance, Section 3, *Uniform Relocation Act*, and recordkeeping.

Employment History

Hagerty Consulting, Inc., Manager - Recovery Division, 2019 to Present

Witt O'Brien's, Subject Matter Expert, 2018 to 2019

Winsor Consult Group, Finance Manager, 2014 to 2018

Saint Barnabas Medical Center, Administrative Support, 2013 to 2014

PMSI Direct Marketing and Support Services, Data Analyst, 2005 to 2023

Education

- » Master of Science, Enterprise Risk Management
Focus: Strategic & Operational Risks
Columbia University, 2017
- » Master of Public Administration,
John Jay College, 2013
- » Bachelor of Science, Legal Studies
Minor: Government
John Jay College, 2007

Relevant Highlights

- » Authored the Unmet Needs/Match Funding sections of the United States Virgin Island's 4-Tranche Access Point approved by HUD for \$1.8 billion in 2018
- » Completed successful risk assessments and monitoring of nearly a dozen county and city jurisdictions in CA receiving subrecipient funding from the 2019 Wildfires
- » Designed and implemented streamlined HUD-compliant vendor billing processes
- » Improved transparency in financial reporting systems through conducting comprehensive analyses on long-term disbursement metrics, lifecycle tendencies, and compliance checks

Professional Biography

Mr. Philip Betito is a grants management and disaster recovery professional with 17 years of progressive experience. Since 2019, he has served Hagerty Consulting, Inc. (Hagerty) as a Disaster Recovery Consultant assisting local and state municipalities in managing their federal grant funding. With an advanced understanding of HUD Community Development Block Grant – Disaster Recovery (CDBG-DR), Federal Emergency Management Agency (FEMA) Public Assistance (PA), Individual Assistance (IA), and hazard mitigation, Mr. Betito has assisted clients in managing their recovery programs to ensure efficient and impactful outcomes. From program design to program implementation, through to program closeout, he bears experience in several phases of the disaster recovery program lifecycle as it pertains to compliance and monitoring.

Relevant Professional Experience

Disaster Recovery Consultant | Manatee County, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Assisted in the development of the CDBG-DR Action Plan; integrated federal, state, and local regulatory frameworks to define program objectives, eligible activities, and allocation methodologies; ensured alignment with unmet needs assessments and citizen participation standards.

Disaster Recovery Consultant | State of North Carolina | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.
- » Managed citizen participation feedback to the state's CDBG-DR Action Plan.

Disaster Recovery Consultant | City of Asheville, North Carolina, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.

Philip Betito

Program Manager



Disaster Recovery Consultant | St. Louis County, Missouri, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed Economic Revitalization program within the CDBG-DR Action Plan; identified post-storm impacts to the County including financial needs to be potentially satisfied by CDBG-DR funding.

Disaster Recovery Consultant | California Department of Housing and Community Development, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Provided the California Department of Housing and Community Development with policy and design support for the recovery program's Monitoring & Compliance procedures
- » Created risk assessment procedures for assessing sub-recipient entities pre and post allocation of grant funding
- » Assisted in drafting grantee policies pertaining to sub-recipient monitoring, including the development of standard operating procedures governing both desk reviews and onsite monitoring
- » Tailored risk assessment procedures based on specific sub-program needs (Owner-Occupied Rehabilitation, Multi-family Housing, and Infrastructure)
- » Conducted due diligence reviews on subrecipient jurisdictions receiving CDBG-DR grant allocations
- » Developed housing recovery strategies for impacted counties including Sonoma, Ventura, Butte, Mendocino, Yuba, Napa, Santa Barbara, and Los Angeles counties

Disaster Recovery Consultant | New York City Mayor's Office of Management and Budget, Disaster Recovery Support | Hagerty Consulting, Inc.

- » Led agency support effort in creating/completing CDBG-DR Financial Management Grant Compliance Certification for Hurricane Ida.

Disaster Recovery Consultant | Texas General Land Office | Hagerty Consulting, Inc.

- » Provided design support for programmatic CDBG-DR procedures including financial procedures, record management, project eligibility, and community outreach/marketing plans.
- » Supported General Land Office (GLO) with establishing recovery support parameters for its Housing program implementation in the City of Houston and its surrounding counties.
- » Created applicant eligibility procedures to meet GLO program requirements, as well as HUD CDBG-DR regulations.

Employment History

Hagerty Consulting, Inc., Recovery Manager, 2019 to Present

Witt O'Brien's, Consultant, Community Development Block Grant-Disaster Recovery Subject Matter Expert, 2018 to 2019

Winsor Consulting Group, Consultant, 2015 to 2018

Eltman Eltman & Cooper PC, Compliance Associate, 2012 to 2014

Rivkin Radler LLP, Paralegal, 2008 to 2012

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.

Nathan Beam

Grants Management Specialist



- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.
- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Nathan Beam

Grants Management Specialist



Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.
- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Madeline Stoddart, MPA

Grants Management Specialist



Education

- » Master of Public Administration, New York University, 2017
- » Bachelor of Science, Georgia Institute of Technology, 2010
- » Arabic Language Institute and Study Abroad, the American University in Cairo, 2009

Relevant Highlights

- » Directed oversight and management of more than \$675M in FEMA PA COVID-19 funds for hospitals and universities
- » Directed oversight and management of several clients Hurricane Michael recovery portfolios (+25M)
- » Direct oversight and management of NYC's Hurricane Sandy Recovery portfolios (+\$1B)
- » Skilled in analysis, requirement definition, and business process improvement related to the federal grant management.
- » Skilled in policy analysis, including federal and state procurement requirements.
- » Experience with tools, data analysis, and software used for financial and grant management and econometric research.
- » Field organizer in areas of public health, community and economic development organization, and civil society strengthening.

Professional Biography

Ms. Madeline Stoddart is a senior recovery analyst with more than seven years of disaster cost recovery experience, specializing in policy and program analysis, cost recovery planning, federal funds management, and stakeholder engagement.

Ms. Stoddart currently leads a team managing more than \$675 million in Federal Emergency Management Agency (FEMA) Public Assistance (PA) funding and more than \$300 million in Health Resources and Services Administration (HRSA) Provider Relief Funds (PRF) for hospitals and universities for their response to the Novel Coronavirus (COVID-19). Ms. Stoddart is skilled in policy and program analysis, supporting Hagerty's review and analysis of navigating new and changing programs and processes related to disaster preparedness, response, and recovery. She has extensive experience in tailoring disaster recovery support to specific client needs and long-term recovery goals, having managed multiple clients and recovery programs for clients after COVID-19, Hurricane Michael, and Hurricane Sandy. In her support of New York City's (NYC's) Hurricane Sandy Recovery, Ms. Stoddart developed and implemented change management strategies designed to engage stakeholders and build the City's overall capacity to manage multiple streams of federal funding effectively and efficiently.

Ms. Stoddart's recovery experience includes in-depth financial and policy analysis, development of grant management software and processes, and developing and implementing guidance related to policy, procurement and contract requirements, grant management closeout processes, and audit-readiness. She has also developed workflows and evaluation tools in the fields of public health education, program design, international education, and community engagement. Prior to joining Hagerty Consulting, Inc. Ms. Stoddart's work focused on long-term community and economic development, focusing on public health, access to public services, stakeholder engagement, and long-term economic growth.

Relevant Professional Experience

Deputy Project Manager | Washington State Hospital and University Portfolio | Hagerty Consulting, Inc.

- » Directly managed multiple clients in recovery from COVID-19, including FEMA PA grants, HRSA PRF, *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act) funding, *American Rescue Plan Act* (ARPA) funding, and State appropriations specific to COVID-19 response.
- » Developed a cost recovery planning template and framework for healthcare and university clients to maximize use of federal funding, minimize duplication of benefits, and implement internal processes to track and document response and recovery-related costs for potential reimbursement.
- » Development and implementation of Grant Management System (GMS) for multiple clients to track financial data, grant development, documentation, reimbursement, and closeout and audit readiness.

Cost Recovery Subject Matter Expert | Kansas Division of Emergency Management | Hagerty Consulting, Inc.

- » Developed cost recovery framework and tools for Kansas' State and local recovery plans, focusing on policy and process improvement to reduce administrative burden for financial recovery under state and federal funding programs, such as FEMA PA, United States (US) Department of Housing and Urban Development (HUD) Community Development Block Grant – Disaster Recovery (CDBG-DR), FEMA Hazard Mitigation Grant Program (HMGP), and Building Resilient Infrastructure and Communities (BRIC) funding.
- » Co-facilitated tabletop exercises for county emergency management teams developing local recovery plans, focusing on whole-community response, operations planning and coordination, and cost recovery planning.
- » Developed tools and resources to build capacity to obtain, manage, and retain federal funds.

Technical Assistance Advisor | Bloomberg E311 Program | Hagerty Consulting, Inc.

- » Provided real-time policy analysis for federal funds management under Bloomberg Philanthropies and US Council of Mayors helping cities identify, obtain, and retain federal funding for COVID-19 recovery and response efforts, specializing in CARES Act funding, Coronavirus State and Local Fiscal Recovery Funds (SLFRF), and ARPA funding.
- » Developed best case practices for federal funds management, specializing in cost recovery planning, program administration, subrecipient monitoring, compliance, audit-readiness, procurement and contracting processes, and documentation management under federal awards.

Policy and Technical Assistance Advisor – CTEH Arkansas CARES Funds Management | Hagerty Consulting, Inc.

- » Provided technical process and policy analysis for federal funds management for the State of Arkansas coronavirus relief funding, including FEMA PA, FEMA Lost Wages Assistance funding, CARES Act funding, Coronavirus SLFRF, and ARPA funding.
- » Supported development of processes and internal controls for Subrecipient Award Process, focusing on compliance and monitoring of subawards, financial reporting, and documentation management.

Madeline Stoddart, MPA

Grants Management Specialist



Policy and Technical Assistance Planner | Maryland Hospital Association | Hagerty Consulting, Inc.

- » Developed the Association's policy and procedures for the management of federal and state grants, specifically HHS' Administration for Strategic Preparedness Hospital Preparedness Program, a cooperative agreement to support hospitals and healthcare networks plan for and respond to large-scale emergencies and disasters.
- » Engaged with stakeholders to review and recommend improvements to existing internal control and oversight processes, documentation management controls, and formalized subaward processes for disbursement of federal funds.

Deputy Project Manager | Panama City, FL Hurricane Michael Recovery Projects | Hagerty Consulting, Inc.

- » Directly managed multiple clients in recovery from Hurricane Michael, including FEMA PA grants, US HUD CDBG-DR, FEMA HMGP, and Florida Housing Finance Coalition Hurricane Housing Recovery Program funding.
- » Managed development of a coordinated long-term strategic approach for County-wide Hurricane Michael housing recovery program, including draft Action Plan proposal for CDBG-DR funding, capacity building to manage more than \$40 million in State-funded housing programs, and internal program and process improvement to meet compliance and reporting requirements.
- » Coordinated detailed policy analysis of HUD CDBG-DR and Florida Department of Economic Opportunity (DEO) eligibility, reporting, and compliance requirements, including FEMA PA and HMGP local match requirements.
- » Successful appeal of FEMA Determination memo valued at \$2+ million to defend the eligibility of local implementation of the Private Property Debris Removal program.
- » Successful application for Florida DEO Job Growth Grant Fund for \$2.8 million in public infrastructure funding to support Panama City's recovery from Hurricane Michael.
- » Development and implementation of Disaster Financial Management System for multiple clients to track financial data, grant development, reimbursement and closeout and audit readiness.

Senior Compliance and Monitoring Analyst, Federal and State Grants Monitoring Taskforce | New York City Mayor's Office of Management and Budget

- » Directly managed multiple city agency Hurricane Sandy recovery portfolios, providing support, analysis, and oversight for NYC's \$9.5 billion in FEMA PA grants and coordination with HUD CDBG-DR local match projects.
- » Managed development of city-wide document management system for Sandy recovery grants to meet federal grant record retention requirements, improve grant management business processes, and mitigate audit risks.
- » Analyzed PA reimbursement and closeout processes, including developing guidance and analytical tools to improve compliance, diagnosing trends, assessing risk, and streamline grant management and compliance activity.
- » Engaged key agency partners in risk and needs analysis, communicated technical and policy conformance requirements, defined critical roles, responsibilities, and expectations, and improved the City's capacity to manage federal grants.

Graduate Teaching Assistant | New York University Robert F Wagner School of Public Service

- » Conducted more than 100 teaching hours covering basic economic evaluation and statistical evaluation concepts, introduction to econometric analysis and research, and applied public policy research concepts using Software for Statistics and Data Science (STATA).
- » Tutored students in microeconomics, multiple regressions and data analysis, and applied statistics.

Madeline Stoddart, MPA

Grants Management Specialist



Health Education Advisor, Kyrgyzstan | US Peace Corps

- » Developed site-specific monitoring, reporting, training, and evaluation tools for the Peace Corps Kyrgyzstan Health Education Program and local community partners, including the National Center for Health Promotion.
- » Designed and implemented national project for appreciative inquiry-driven strategic planning for community-based health promotion network, impacting more than 1,200 unique organizations.
- » Administered impact and process evaluation for national public health interventions on tuberculosis, brucellosis, Hepatitis A, HIV, and pre/ante-natal nutrition, providing quantitative and qualitative analysis of program implementation.

Intern, US Embassy - Syria | US Department of State, Office of Public Diplomacy

- » Supported public diplomacy initiatives, including coordinating a Congressional Delegation and implementation of the Fulbright Specialist Program.
- » Coordinated capacity building programs and funding opportunities for civil society and community organizations.

Intern, Competitive Bids, Information, and Cost Support | CARE USA

- » Supported proposal response preparation for federal and international funding, including stakeholder coordination, funding and policy research, and developing a database of past performance references.

Employment History

Hagerty Consulting, Recovery Manager, 2024 to Present

Hagerty Consulting, Senior Managing Associate, 2021 to 2023

Hagerty Consulting, Managing Associate, 2019 to 2020

New York, New York Mayor's Office of Management and Budget, Senior Compliance and Monitoring Analyst, 2016 to 2018

NYU Robert F Wagner School of Public Service, Graduate Teaching Assistant, 2016 to 2017

US Peace Corps - Kyrgyzstan, Health Education Advisor, 2013 to 2015

Organizing for America, Field Organizer, 2012

The American University in Cairo, Admissions Counselor and Recruiter, 2011 to 2012

US Department of State, US Embassy – Syria Public Diplomacy Intern, 2009 to 2010

CARE USA, Intern, 2009

Resumes: Task 3

Education

- » Executive Leadership Program, US Naval Postgraduate School/Center for Homeland Defense and Security
- » Master of Public Administration/Government Public Management, Appalachian State University
- » Bachelor of Science, Criminal Justice, Appalachian State University

Relevant Highlights

- » Former Administrator of FEMA, coordinated federal government response to over 144 Presidential Major Disaster Declarations and 112 wildfires
- » Led revision to the National Response Framework to include a new Emergency Support Function (ESF-14) for Cross Sector Infrastructure Coordination
- » Launched the Community Lifelines Doctrine for FEMA
- » Developed/implemented FEMA Integration Teams to embed staff alongside state and tribal partners
- » Neil Frank Award, National Hurricane Conference, 2021
- » Distinguished Alumni Award, Appalachian State University, 2019
- » Good Samaritan Award, Samaritan's Purse, 2019

Professional Biography

Mr. William "Brock" Long is the former Administrator of the Federal Emergency Management Agency (FEMA) and a 23-year veteran of emergency management and homeland security, with progressive experience assisting and supporting local, state, and federal governments to build robust emergency management and public health preparedness programs nationwide. He specializes in evacuation, public safety, recovery management, and response logistics. He has supported the development of pre-disaster planning and post-disaster long-term recovery efforts to help cities, counties, states, and the United States (US) increase resilience against future disasters and enhance response capabilities.

As the FEMA Administrator, Mr. Long served as the nation's principal advisor to the President, responsible for coordinating the entire array of federal government resources down through 50 states, 573 tribal governments, and 16 island territories to assist with executing disaster preparedness, mitigation, response, and recovery. Mr. Long is also the former Director of the Alabama Emergency Management Agency where he acted as the State Coordinating Officer (SCO) for 14 disasters, including eight Presidential Major Disaster Declarations, six state declared events, and two events of national significance. Concurrently, he served on the FEMA National Advisory Committee (NAC) advising the sub-committee for response and recovery. During the nationally significant Deepwater Horizon Oil Spill Incident, Mr. Long served as the on-scene Incident Commander for the Alabama Unified Command.

Mr. Long has been called upon twice to testify before the US Congress regarding response to, and recovery from, catastrophic events. His opinion has been sought by numerous media outlets including CNN, the Associated Press, and the Weather Channel. He also has authored or contributed to several publications.

Mr. Long provides strategic direction and leadership to Hagerty Consulting, Inc.'s (Hagerty) full complement of emergency management programs and professionals, offering subject matter expertise for select projects and contributing as a thought leader to the growing body of knowledge in the emergency management community. He has been instrumental in supporting Hagerty's response and recovery missions, providing executive advisory support to numerous state and local emergency management directors and providing policy guidance on strategic issues.

Relevant Professional Experience

Administrator | Federal Emergency Management Agency

- » Led 21,000 diverse and dedicated public servants and executed a multi-billion-dollar operating budget (\$15.9 billion annual appropriation/more than \$44 billion Disaster Relief Fund).
- » Coordinated the federal government's response to over 144 Presidential Major Disaster Declarations and 112 wildfires, including three of the nation's most devastating hurricanes and five of the worst wildfires ever experienced.
- » Directed the US Fire Administration, the Center for Domestic Preparedness, Emergency Management Institute, and National Domestic Preparedness Consortium, responsible for establishing and improving competencies of officials within public safety at all levels of government charged with protecting against, responding to, and recovering from emergencies.
- » Rapidly transformed the agency's business enterprise by implementing the innovative Community Lifeline and FEMA Integration Team (FIT) concepts to strengthen private/public partnerships and permanently embed full-time FEMA professionals within state and tribal governments to better meet constituent needs.
- » Influenced federal legislation through 12 Congressional testimonies, resulting in the passage of the Disaster Recovery Reform Act (DRRA) that made Pre-Disaster Mitigation a national priority, provided meaningful changes to the FEMA workforce, and bolstered state and local emergency management capability.
- » Executed the National Flood Insurance Program (\$1.3 trillion exposure/five million policy holders) and implemented cutting-edge reinsurance capital market concepts that saved taxpayers approximately \$1 billion during Hurricane Harvey.
- » Ensured continuity for the entire Executive Branch of government on behalf of the White House. Preserved the nation's ability to make sure government mission essential functions continued regardless of any threat or emergency.

Executive Level Advisor | Florida Division of Emergency Management COVID-19 Response Support | Hagerty Consulting, Inc.

- » Provided support for the Florida Division of Emergency Management (FDEM) in response to COVID-19.
- » Guided the development of community-based test site procedures; supported strategic implementation of mass care and feeding efforts throughout the State of Florida; and assisted with the creation of a non-congregate shelter program to support co-response operations during the 2020 hurricane season.

Project Advisor | Texas General Land Office Alternative Housing Study Phase I and Phase II | Hagerty Consulting, Inc.

- » Supported the Texas General Land Office in performing studies relating to alternative housing for disaster recovery efforts, including addressing the challenges of co-disasters like the COVID-19, flooding, and hurricanes.
- » Provided expertise in the implementation of temporary housing programs under the FEMA Individual Assistance (IA) Program and points of integration with the Community Development Block Grant – Disaster Recovery (CDBG-DR) Program.

Brock Long

Project Executive/Subject Matter Expert



Director | Alabama Emergency Management Agency and Deputy Director of the Alabama Department of Homeland Security

- » Appointed as the Governor's Authorized Representative and State Coordinating Officer for eight Presidential Major Disaster Declarations, and six state declared disaster events, including executing the state's response to the H1N1 pandemic flu threat.

Employment History

Hagerty Consulting, Inc., Executive Chairman, 2019 to Present

Federal Emergency Management Agency, Administrator, 2017 to 2019

Hagerty Consulting, Inc., Executive Vice President, 2011 to 2017

Alabama Emergency Management Agency, Director, 2008 to 2011

Beck Disaster Recovery, Inc., Southeast Regional Director, 2007 to 2008

Federal Emergency Management Agency, Hurricane Program Manager, 2001 to 2006

Georgia Emergency Management Agency, Statewide Planner/School Safety Coordinator, 1999 to 2001

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » Master of Science, Enterprise Risk Management
Focus: Strategic & Operational Risks
Columbia University, 2017
- » Master of Public Administration, John Jay College, 2013
- » Bachelor of Science, Legal Studies
Minor: Government
John Jay College, 2007

Relevant Highlights

- » Authored the Unmet Needs/Match Funding sections of the United States Virgin Island's 4-Tranche Access Point approved by HUD for \$1.8 billion in 2018
- » Completed successful risk assessments and monitoring of nearly a dozen county and city jurisdictions in CA receiving subrecipient funding from the 2019 Wildfires
- » Designed and implemented streamlined HUD-compliant vendor billing processes
- » Improved transparency in financial reporting systems through conducting comprehensive analyses on long-term disbursement metrics, lifecycle tendencies, and compliance checks

Professional Biography

Mr. Philip Betito is a grants management and disaster recovery professional with 17 years of progressive experience. Since 2019, he has served Hagerty Consulting, Inc. (Hagerty) as a Disaster Recovery Consultant assisting local and state municipalities in managing their federal grant funding. With an advanced understanding of HUD Community Development Block Grant – Disaster Recovery (CDBG-DR), Federal Emergency Management Agency (FEMA) Public Assistance (PA), Individual Assistance (IA), and hazard mitigation, Mr. Betito has assisted clients in managing their recovery programs to ensure efficient and impactful outcomes. From program design to program implementation, through to program closeout, he bears experience in several phases of the disaster recovery program lifecycle as it pertains to compliance and monitoring.

Relevant Professional Experience

Disaster Recovery Consultant | Manatee County, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Assisted in the development of the CDBG-DR Action Plan; integrated federal, state, and local regulatory frameworks to define program objectives, eligible activities, and allocation methodologies; ensured alignment with unmet needs assessments and citizen participation standards.

Disaster Recovery Consultant | State of North Carolina | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.
- » Managed citizen participation feedback to the state's CDBG-DR Action Plan.

Disaster Recovery Consultant | City of Asheville, North Carolina, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.

Philip Betito

Program Manager



Disaster Recovery Consultant | St. Louis County, Missouri, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed Economic Revitalization program within the CDBG-DR Action Plan; identified post-storm impacts to the County including financial needs to be potentially satisfied by CDBG-DR funding.

Disaster Recovery Consultant | California Department of Housing and Community Development, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Provided the California Department of Housing and Community Development with policy and design support for the recovery program's Monitoring & Compliance procedures
- » Created risk assessment procedures for assessing sub-recipient entities pre and post allocation of grant funding
- » Assisted in drafting grantee policies pertaining to sub-recipient monitoring, including the development of standard operating procedures governing both desk reviews and onsite monitoring
- » Tailored risk assessment procedures based on specific sub-program needs (Owner-Occupied Rehabilitation, Multi-family Housing, and Infrastructure)
- » Conducted due diligence reviews on subrecipient jurisdictions receiving CDBG-DR grant allocations
- » Developed housing recovery strategies for impacted counties including Sonoma, Ventura, Butte, Mendocino, Yuba, Napa, Santa Barbara, and Los Angeles counties

Disaster Recovery Consultant | New York City Mayor's Office of Management and Budget, Disaster Recovery Support | Hagerty Consulting, Inc.

- » Led agency support effort in creating/completing CDBG-DR Financial Management Grant Compliance Certification for Hurricane Ida.

Disaster Recovery Consultant | Texas General Land Office | Hagerty Consulting, Inc.

- » Provided design support for programmatic CDBG-DR procedures including financial procedures, record management, project eligibility, and community outreach/marketing plans.
- » Supported General Land Office (GLO) with establishing recovery support parameters for its Housing program implementation in the City of Houston and its surrounding counties.
- » Created applicant eligibility procedures to meet GLO program requirements, as well as HUD CDBG-DR regulations.

Employment History

Hagerty Consulting, Inc., Recovery Manager, 2019 to Present

Witt O'Brien's, Consultant, Community Development Block Grant-Disaster Recovery Subject Matter Expert, 2018 to 2019

Winsor Consulting Group, Consultant, 2015 to 2018

Eltman Eltman & Cooper PC, Compliance Associate, 2012 to 2014

Rivkin Radler LLP, Paralegal, 2008 to 2012

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



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- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Julia Zachgo

Grants Management Specialist



Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Ashley Napier

Grants Management Specialist



Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Grants Management Specialist



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Resumes: Task 4

Education

- » Bachelor of Arts, Indiana University College of Arts and Sciences, 2012

Training and Certifications

- » Professional Certificate in Municipal Finance, The University of Chicago Harris School of Public Policy, 2018
- » Chicago Public Library Foundation, Associate Board, Membership Committee, 2019 to Present

Relevant Highlights

- » Worked on the two largest financial crises in US history
- » Experience advising elected and senior appointed government officials
- » Fiscal management reform and restructuring expertise
- » Focuses on helping governments transform and rebuild their operations during critical crises
- » Experienced consulting professional with dedicated public service focus

Professional Biography

Mr. John H. Hageman is a Deputy Director at Hagerty Consulting, Inc. (Hagerty) with over a decade of experience in strategic management, public sector finance and administration, and restructuring and turnaround. At Hagerty, Mr. Hageman leads the firm's Federal Funds Management services, helping state and local governments identify, secure, manage, and implement federal funds with an emphasis on funding under the *American Rescue Plan Act (ARPA)*, *Infrastructure Investment and Jobs Act (IIJA)*, and *Inflation Reduction Act*. Mr. Hageman oversees a portfolio of engagements and Hagerty professionals who assist state and local governments in their administration of over \$14 billion in federal funds. Mr. Hageman specializes in helping governments recover from fiscal and economic distress and crises, having held critical, executive-level roles on the two largest municipal financial crises in United States (US) history.

Relevant Professional Experience

Project Executive | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Leads efforts within the County to administer Community Development Block Grant-Disaster Recover, including the development of the federally compliant Action Plan approved by the US Department of Housing and Urban Development.
- » Oversees overall design and implementation of the program for proper disbursement to community partners, including subrecipients and local stakeholders.

Project Executive | Manatee County, Florida, Department of Transportation Grant Writing | Hagerty Consulting, Inc.

- » Leads efforts within the County to locate, apply for, and manage Federal, State, nonprofit, foundation, corporate, and private grants for the benefit of citizens and visitors of Manatee County. Projects managed include support for the Transportation Ferry Grant, which serves resident passengers and visitors seeking to participate in economic investment and tourism activities.

John H. Hageman

Project Executive/Subject Matter Expert



Project Executive | State of Washington, Federal Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversees the state-wide Federal Funds Grant Writing Assistance Program for Washington to help local and tribal governments, businesses, nonprofits ports, and other resource-constrained communities apply for and access federal funds.

Project Executive | State of Wyoming, Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversee the state-wide Wyoming Grants Assistance Program (WYGAP), offering support to non-profit organizations, small businesses, local and tribal governments, and more in efforts to attain and manage federal funding.
- » Oversee efforts to produce grant opportunity scans, assessing potential programs for WYGAP users; technical assistance meetings and direct outreach; and, efforts to deliver comprehensive planning for integrating state and Federal funds into programmatic needs.
- » Oversee team responsible for planning and coordinating Wyoming Funding Summit, sponsored by the Governor and US Senators; lead team responsible for developing and delivering training sessions focused on the grants management lifecycle including pre-award and post-award grant management and compliance.

Program Manager | Maryland Department of Budget and Management, American Rescue Plan Act Administration and Management | Hagerty Consulting, Inc.

- » Leads Hagerty team that supports the State's \$3.7 billion Coronavirus State Fiscal Recovery Funds allocation. Responsible for US Department of the Treasury (Treasury) and Uniform Guidance compliance, ARPA policy advisory, federal and internal reporting, and technical assistance to the Department of Budget and Management and State agencies.

Project Advisor | New York City Office of Management and Budget, American Rescue Plan Act Support and Advisory Services | Hagerty Consulting, Inc.

- » Provided direction and guidance to Hagerty team that supports the New York City Office of Management and Budget in compliance with US Treasury program guidance and Uniform Guidance, organizational design/implementation, and federal reporting associated their \$5.9 billion State and Local Fiscal Relief Funds through ARPA/

Program Manager and Subject Matter Expert | Huntsville Utilities, Alabama, Federal Funds Strategy | Hagerty Consulting, Inc.

- » Provide oversight and subject matter expertise to Hagerty team that supports Huntsville Utilities in the assessment of unfunded priorities and the identification of federal funds. Advise on water, electric, and cyber programs within the IJA.

Employment History

Hagerty Consulting, Inc., Deputy Director, 2023 to Present

Hagerty Consulting, Inc., Senior Manager, 2021 to 2023

Hageman Consulting, Inc., Independent Consultant, 2019 to 2021

City of Detroit, Michigan Government, Chief of Staff, Office of the Chief Financial Officer, 2015 to 2019

John H. Hageman

Project Executive/Subject Matter Expert



Public Consulting Group, Business Analyst, 2013 to 2015

AmeriCorps VISTA, Hearts & Hands of Indiana, Volunteer Coordinator, 2012 to 2013

Obama For America, Deputy Field Organizer, 2012

Indiana University, School of Public Health, Research Assistant, 2012

Education

- » BA, Economics and German Language, George Mason University, 1989
- » Graduate Credit Hours (Master of Divinity, 34), Wesley Theological Seminary, 1993

Trainings/Certifications

- » Project Management Certificate, Cornell University, March 2022
- » Certified HOME Program Specialist, 2009
- » Public Housing Manager, 1996
- » Housing Quality Standards (HUD HQS), 1995

Relevant Highlights

- » Community Development Block Grants for Disaster Recovery (CDBG-DR), Mitigation (CDBG-MIT), and Coronavirus (CDBG-CV)
- » Financial and Programmatic Auditing of Federal Grant Subrecipients
- » Policy Development
- » Program Management
- » Affordable Housing Program Implementation and Administration
- » LIHTC
- » Economic Development
- » Infrastructure Project Management

Professional Biography

Mr. David Sidney Bennett is a disaster recovery management professional with over 33 years of experience providing housing-specific programming. In his work, he routinely provides technical assistance under the United States Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) Disaster Recovery (-DR), Mitigation (-MIT), and Coronavirus (-CV); Community Compass; and Enterprise Community Partners programs to grant recipients and subrecipients, including within the State of Florida. In recent years, Mr. Bennett has served as a project/grant manager and general technical assistance resource supporting CDBG, CDBG-DR, CDBG-MIT, CDBG-CV; *American Rescue Plan Act*; Economic Development Administration (EDA), Community Services Block Grant (CSBG), Section 108 loan securitization; HOME Investment Partnerships, Section 811; and Low-Income Housing Tax Credit (LIHTC) monitoring for both fiscal and programmatic compliance (including complex multi-layered funded projects). Mr. Bennett has developed CDBG program manuals, environmental review templates, and subrecipient monitoring forms that HUD used as models for other entitlement communities and participating jurisdictions.

Relevant Professional Experience

Senior Subject Matter Expert | Community Development Block Grant – Disaster Recovery Portfolio Oversight | Manatee County, FL | Hagerty Consulting, Inc.

- » Provided SME technical assistance to key Manatee County CDBG-DR Action Plan/Unmet Needs Assessment writing/analysis phase
- » Reviewed, edited and provided guidance on Action Plan envisioned project specific policies and procedures that are being developed.

Project Executive | Action Plan and Unmet Needs Assessment | St. Louis County, Missouri | Hagerty Consulting, Inc.

- » Served as liaison between County and Hagerty Consulting on project and scope. Provided key project staff with subject matter expertise (SME) and technical assistance to include review/edit of entire Action Plan and documents supporting the Financial Certifications submission to HUD. Provided the County with general programmatic SME technical assistance including distilling and understanding federal statutory requirements.

David Sidney Bennett

Project Executive/Subject Matter Expert



Senior Subject Matter Expert | Lee County, Florida, Recovery and Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided review of and comment on featured projects to be submitted by Hagerty Consulting clients including Cape Coral and Estero Beach that are subrecipient partners to Lee County.
- » Ensured that projects were compliant with Lee County award expectations and met federal crosscutting statutory compliance

Senior Subject Matter Expert | Panama City Beach, Florida, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided SME technical assistance primarily in the areas of labor standards compliance.

Senior Subject Matter Expert | Detroit-Dearborn, Michigan, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » As Hagerty Consulting's role providing HUD Community Compass Technical Assistance to these two cities, provided review of single family housing programmatic standards applicable to affordable housing programs and issues resolutions to client.

Project Advisor | Montgomery County, Texas, San Jacinto Watershed Infrastructure Project | Hagerty Consulting, Inc.

- » Directly serving as key staff on \$60M CDBG-MIT Montgomery County San Jacinto Watershed Infrastructure Project following needs identified by County and State government.

Project Advisor | Asheville, North Carolina, Post-Hurricane Helene Disaster Response and Recovery | Hagerty Consulting, Inc.

- » Assisted in completing an Action Plan, Financial Certifications, and various procedures and policies for the State of North Carolina resulting from Hurricane Helene.

Program Manager/Lead Subject Matter Expert | Lee County, Florida, Community Development Block Grant – Disaster Recovery Oversight Management | HGA

- » Led a team of professionals embedded in the Lee County, Florida Department of Strategic Resources and Government Affairs that assist the County in planning, designing, and implementing programs funded under the \$1.1 billion allocation.
- » Maintained funding compliance, timely and appropriate expenditure of funds, procurement of professional and construction services, and maintained all aspects of compliance.
- » Drafted and assisted County in developing policies to govern the allocation (infrastructure, planning, public services, multi/single family housing reconstruction/rehabilitation/new construction), notice of funding opportunity availability to subrecipients, subrecipient agreements, internal processes and financial management, and ensure full statutory regulatory compliance.
- » Served as lead subject matter expert on all programmatic and regulatory compliance issues to both HGA and County staff.
- » Assisted County, as needed, with Action Plan Amendments and Substantial Amendments, and during federal, state, and self monitoring visits/audits.

David Sidney Bennett

Project Executive/Subject Matter Expert



Regulatory Compliance Officer | Puerto Rico Department of Housing, Oversight Management Services for United States Department of Housing and Urban Development Mitigation Infrastructure Programs | HGA

- » Oversaw project compliance with applicable federal, state, and local regulations.
- » Ensured compliance with required National Objectives; cross-cutting guides; and the *Davis Bacon Act*, Section 3, Urban Redevelopment Authority, and Environmental Review requirements.
- » Evaluated proposed activities for eligibility under federal program guidelines.
- » Served as a subject matter expert on healthcare set-aside projects and billion-dollar transportation projects.

Technical Advisor | Department of Housing and Urban Development Community Compass and Enterprise Community Foundation, Technical Assistance | HGA

- » Developed and presented technical assistance training for HUD CDBG-DR, CDBG Entitlement, and CDBG-MIT grant recipients and subrecipients.
- » Presented webinar synchronous training to 78 subrecipient municipios and multiple state agencies in Puerto Rico.
- » Provided technical assistance to date in the areas of Environmental Review Records, Economic Development, *Uniform Relocation Assistance and Real Property Acquisition Act*, Financial Management, Subrecipient Management, Section 504/ADA, Section 3 and Minority and Women-Owned Business Enterprises, *Davis Bacon* and Related Acts Labor compliance, Procurement, development of Systems of Record, and Disaster Recovery Grants Reporting System Reporting and Compliance.

Program Policy Subject Matter Expert | Texas Back in Business Economic Revitalization Program | Texas General Land Office | HGA

- » Implemented policy and program delivery protocols for the Economic Revitalization Program, which serves more than 2,500 business applicants in economic stabilization and recovery efforts following Hurricane Harvey.
- » Worked in tandem with the General Land Office (GLO) and imbedded contract staff to develop eligibility and underwriting processes to guide staff in evaluating applications and providing grant funding to eligible businesses in 49 most impacted and distressed counties.
- » Served as lead policy staff for GLO leadership, providing expert guidance on federal policy and best practices on this novel economic development undertaking that has not previously been provided under this model in the CDBG-DR space.

Employment History

Hagerty Consulting, Inc., CDBG-DR Practice Leader - Recovery, 2024

HGA, Program Manager and Senior Consultant, 2015 to 2024

Institute for Building Technology and Safety, Senior Manager – Community Development Services, 2014 to 2015

Arlington County Government, Federal Programs Coordinator, 2008 to 2014

Loudoun County Government, Manager of Strategic Initiatives and Communications, 2006 to 2008

Fairfax County Government, Management Analyst II, 2004 to 2006

Fairfax County Government, Housing Community Developer, 1994 to 2004

Education

- » Master of Science, Enterprise Risk Management
Focus: Strategic & Operational Risks
Columbia University, 2017
- » Master of Public Administration, John Jay College, 2013
- » Bachelor of Science, Legal Studies
Minor: Government
John Jay College, 2007

Relevant Highlights

- » Authored the Unmet Needs/Match Funding sections of the United States Virgin Island's 4-Tranche Access Point approved by HUD for \$1.8 billion in 2018
- » Completed successful risk assessments and monitoring of nearly a dozen county and city jurisdictions in CA receiving subrecipient funding from the 2019 Wildfires
- » Designed and implemented streamlined HUD-compliant vendor billing processes
- » Improved transparency in financial reporting systems through conducting comprehensive analyses on long-term disbursement metrics, lifecycle tendencies, and compliance checks

Professional Biography

Mr. Philip Betito is a grants management and disaster recovery professional with 17 years of progressive experience. Since 2019, he has served Hagerty Consulting, Inc. (Hagerty) as a Disaster Recovery Consultant assisting local and state municipalities in managing their federal grant funding. With an advanced understanding of HUD Community Development Block Grant – Disaster Recovery (CDBG-DR), Federal Emergency Management Agency (FEMA) Public Assistance (PA), Individual Assistance (IA), and hazard mitigation, Mr. Betito has assisted clients in managing their recovery programs to ensure efficient and impactful outcomes. From program design to program implementation, through to program closeout, he bears experience in several phases of the disaster recovery program lifecycle as it pertains to compliance and monitoring.

Relevant Professional Experience

Disaster Recovery Consultant | Manatee County, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Assisted in the development of the CDBG-DR Action Plan; integrated federal, state, and local regulatory frameworks to define program objectives, eligible activities, and allocation methodologies; ensured alignment with unmet needs assessments and citizen participation standards.

Disaster Recovery Consultant | State of North Carolina | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.
- » Managed citizen participation feedback to the state's CDBG-DR Action Plan.

Disaster Recovery Consultant | City of Asheville, North Carolina, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Completed the Financial Management Grant Compliance Certification to the Action Plan.

Philip Betito

Program Manager



Disaster Recovery Consultant | St. Louis County, Missouri, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed Economic Revitalization program within the CDBG-DR Action Plan; identified post-storm impacts to the County including financial needs to be potentially satisfied by CDBG-DR funding.

Disaster Recovery Consultant | California Department of Housing and Community Development, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Provided the California Department of Housing and Community Development with policy and design support for the recovery program's Monitoring & Compliance procedures
- » Created risk assessment procedures for assessing sub-recipient entities pre and post allocation of grant funding
- » Assisted in drafting grantee policies pertaining to sub-recipient monitoring, including the development of standard operating procedures governing both desk reviews and onsite monitoring
- » Tailored risk assessment procedures based on specific sub-program needs (Owner-Occupied Rehabilitation, Multi-family Housing, and Infrastructure)
- » Conducted due diligence reviews on subrecipient jurisdictions receiving CDBG-DR grant allocations
- » Developed housing recovery strategies for impacted counties including Sonoma, Ventura, Butte, Mendocino, Yuba, Napa, Santa Barbara, and Los Angeles counties

Disaster Recovery Consultant | New York City Mayor's Office of Management and Budget, Disaster Recovery Support | Hagerty Consulting, Inc.

- » Led agency support effort in creating/completing CDBG-DR Financial Management Grant Compliance Certification for Hurricane Ida.

Disaster Recovery Consultant | Texas General Land Office | Hagerty Consulting, Inc.

- » Provided design support for programmatic CDBG-DR procedures including financial procedures, record management, project eligibility, and community outreach/marketing plans.
- » Supported General Land Office (GLO) with establishing recovery support parameters for its Housing program implementation in the City of Houston and its surrounding counties.
- » Created applicant eligibility procedures to meet GLO program requirements, as well as HUD CDBG-DR regulations.

Employment History

Hagerty Consulting, Inc., Recovery Manager, 2019 to Present

Witt O'Brien's, Consultant, Community Development Block Grant-Disaster Recovery Subject Matter Expert, 2018 to 2019

Winsor Consulting Group, Consultant, 2015 to 2018

Eltman Eltman & Cooper PC, Compliance Associate, 2012 to 2014

Rivkin Radler LLP, Paralegal, 2008 to 2012

Education

- » MS, Finance, Pace University, 2016
- » BA, Philosophy, Minor: Political Science, Rutgers University, 2007

Training and Certifications

- » FEMA courses: IS-01012, IS-1001, IS, 01000, IS-01005, IS-01006, IS-01007, IS-01008, IS-01009, IS-01014, IS-01015, IS-01018

Relevant Highlights

- » 10+ years as Public Sector consultant
- » Directly manage FEMA's 428 Public Assistance Alternative Procedures (PAAP) grants for NYC agencies in over \$5 billion
- » Financial management in over \$8 billion in COVID-19 for PPE-related costs for New York City
- » Financial management and overall policy support in over \$6 billion in CDBG-DR grants for four states and one US Territory

Professional Biography

Mr. Christopher Delgado serves as a Manager in the Recovery Division for Hagerty Consulting, Inc. (Hagerty) with over 10 years of experience in serving public sector clients in navigating the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, Hazard Mitigation Grant Program (HMGP), Novel Coronavirus (COVID-19) funding programs, and Community Development Block Grant, Disaster Recovery (CDBG-DR) under the (US) Department of Housing and Urban Development (HUD).

Mr. Delgado has submitted and received over \$300 million in FEMA PA and over \$100 million in COVID-19 grant reimbursements for personal protective equipment (PPE)-related costs for New York City (NYC). Mr. Delgado has helped guide the recovery efforts for Manatee County, State of North Carolina, Saint Louis, City of Panama City Beach, Texas General Land Office (GLO), and the California Department of Housing and Community Development (HCD) by providing fiscal and policy support.

Prior to joining Hagerty, Mr. Delgado helped the US Virgin Islands (USVI) Housing Finance Authority by successfully submitting the territories action plan and receiving approval on the USVI's four Tranches in over \$1.8 billion. In addition, he has helped the New York State Governor's Office of Storm Recovery by providing financial oversight and grant management support for Hurricane Sandy Recovery.

Relevant Professional Experience

Certification Checklists Lead & Policy Development | Manatee County, Hurricanes Debby, Helene, and Milton Recovery | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements and the Citizen Participation Plan in accordance with HUD regulations, ensuring timely and accurate submissions.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.
- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Christopher Delgado

Program Manager



Subject Matter Expert | New York City Mayor's Office of Management and Budget, Hurricane Sandy & COVID-19 Recovery | Hagerty Consulting, Inc.

- » Provided financial oversight and management on the \$10 billion Sandy FEMA PA, \$8 billion COVID-19, \$368 million Federal Highway Administration (FHWA), and \$310 million Federal Transit Administration (FTA) grants awarded to NYC.
- » Manage, update, and adjust financial data in the Office of Management and Budget's (OMB's) grants management system.
- » Provided subject matter expertise in reconciling expenditures and submitting progress and closeout payments for over \$400 million in reimbursements.
- » Directly manage FEMA's 428 PAAP grants for NYC agencies over \$5 billion.
- » Collaborated with OMB Agency Task Forces in setting up revenue structures for anticipated FEMA, FHWA, FTA, and COVID-19 revenue, and ensure expense and revenue consistency throughout the fiscal reconciliation process.
- » Analyzed, forecasted, reported, and presented financial data to senior management, OMB, and city agencies.
- » Assisted the Closeout Management Team in the financial reconciliation process.
- » Evaluated Project Worksheets (PWs) to determine grant eligibility for agency expenditures.
- » Conducted fiscal analysis on grant obligations, PW expenditures, and earned revenue.

Closeout Specialist | Florida Division of Emergency Management, COVID-19 Recovery | Hagerty Consulting, Inc.

- » Coordinated the closeout process for large-scale Covid-19 projects, ensuring compliance with federal regulations and timely submission of required documentation.
- » Reviewed and validated PWs, invoices, and supporting documentation to confirm eligibility and proper cost allocation.
- » Liaised with applicants, state agencies, and FEMA representatives to resolve discrepancies and facilitate grant reconciliation.
- » Managed data tracking systems to monitor project status, financial progress, and audit readiness.
- » Prepared closeout packages and final reports for submission to FEMA, ensuring completeness and accuracy.

Subject Matter Expert | State of North Carolina, Tropical Storm Helene Recovery | Hagerty Consulting, Inc.

- » Provided support in developing the Action Plan for the \$1.4B HUD grant awarded to the State of North Carolina.
- » Coordinated the preparation and submission of required reports, ensuring adherence to HUD's compliance standards and deadlines.
- » Reviewed and analyzed grant documentation to identify discrepancies and implement corrective actions for compliance improvements.
- » Reviewed unmet needs data and incorporated findings into the Action Plan to ensure effective allocation of resources and alignment with HUD's priorities.

Certification Checklists Lead & Policy Development | St. Louis County, Missouri Severe Storms and Flooding | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements in accordance with HUD regulations, ensuring timely and accurate documentation.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.

Christopher Delgado

Program Manager



- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Senior Specialist | City of Panama City Beach, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Supported the City in the infrastructure grant application writing, research, and guidance process.

Recovery Program Specialist | Texas General Land Office, Hurricane Harvey Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$3.2 billion grant for the Homeowner Assistance Program (HAP) from HUD awarded to GLO.
- » Cross walked both the City of Houston's and the GLO's HAP guidelines and implementation forms.
- » Developed the Affirmative Fair Housing Marketing Plan and eligibility policies and procedures.
- » Provided guidance on complaints and appeals, and temporary relocation policies and procedures.
- » Drafted waivers and memos for the HAP Program.

Senior Grant Manager | California Department of Housing and Community Development, Wildfires, Flooding, Mudflows, and Debris Flows Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$48 million grant for the Owner-Occupied Rehabilitation and Reconstruction Program from HUD awarded to HCD.
- » Provided guidance on the CDBG-DR Risk Assessment and Monitoring Plan.
- » Developed cross cutting reporting requirements, forms, templates, policies and procedures needed for grant compliance such as Labor Compliance, Section 3, *Uniform Relocation Act*, and recordkeeping.

Employment History

Hagerty Consulting, Inc., Manager - Recovery Division, 2019 to Present

Witt O'Brien's, Subject Matter Expert, 2018 to 2019

Winsor Consult Group, Finance Manager, 2014 to 2018

Saint Barnabas Medical Center, Administrative Support, 2013 to 2014

PMSI Direct Marketing and Support Services, Data Analyst, 2005 to 2023

Resumes: Task 5

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » Bachelor of Arts, Indiana University College of Arts and Sciences, 2012

Training and Certifications

- » Professional Certificate in Municipal Finance, The University of Chicago Harris School of Public Policy, 2018
- » Chicago Public Library Foundation, Associate Board, Membership Committee, 2019 to Present

Relevant Highlights

- » Worked on the two largest financial crises in US history
- » Experience advising elected and senior appointed government officials
- » Fiscal management reform and restructuring expertise
- » Focuses on helping governments transform and rebuild their operations during critical crises
- » Experienced consulting professional with dedicated public service focus

Professional Biography

Mr. John H. Hageman is a Deputy Director at Hagerty Consulting, Inc. (Hagerty) with over a decade of experience in strategic management, public sector finance and administration, and restructuring and turnaround. At Hagerty, Mr. Hageman leads the firm's Federal Funds Management services, helping state and local governments identify, secure, manage, and implement federal funds with an emphasis on funding under the *American Rescue Plan Act (ARPA)*, *Infrastructure Investment and Jobs Act (IIJA)*, and *Inflation Reduction Act*. Mr. Hageman oversees a portfolio of engagements and Hagerty professionals who assist state and local governments in their administration of over \$14 billion in federal funds. Mr. Hageman specializes in helping governments recover from fiscal and economic distress and crises, having held critical, executive-level roles on the two largest municipal financial crises in United States (US) history.

Relevant Professional Experience

Project Executive | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Leads efforts within the County to administer Community Development Block Grant-Disaster Recover, including the development of the federally compliant Action Plan approved by the US Department of Housing and Urban Development.
- » Oversees overall design and implementation of the program for proper disbursement to community partners, including subrecipients and local stakeholders.

Project Executive | Manatee County, Florida, Department of Transportation Grant Writing | Hagerty Consulting, Inc.

- » Leads efforts within the County to locate, apply for, and manage Federal, State, nonprofit, foundation, corporate, and private grants for the benefit of citizens and visitors of Manatee County. Projects managed include support for the Transportation Ferry Grant, which serves resident passengers and visitors seeking to participate in economic investment and tourism activities.

John H. Hageman

Project Executive/Subject Matter Expert



Project Executive | State of Washington, Federal Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversees the state-wide Federal Funds Grant Writing Assistance Program for Washington to help local and tribal governments, businesses, nonprofits ports, and other resource-constrained communities apply for and access federal funds.

Project Executive | State of Wyoming, Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversee the state-wide Wyoming Grants Assistance Program (WYGAP), offering support to non-profit organizations, small businesses, local and tribal governments, and more in efforts to attain and manage federal funding.
- » Oversee efforts to produce grant opportunity scans, assessing potential programs for WYGAP users; technical assistance meetings and direct outreach; and, efforts to deliver comprehensive planning for integrating state and Federal funds into programmatic needs.
- » Oversee team responsible for planning and coordinating Wyoming Funding Summit, sponsored by the Governor and US Senators; lead team responsible for developing and delivering training sessions focused on the grants management lifecycle including pre-award and post-award grant management and compliance.

Program Manager | Maryland Department of Budget and Management, American Rescue Plan Act Administration and Management | Hagerty Consulting, Inc.

- » Leads Hagerty team that supports the State's \$3.7 billion Coronavirus State Fiscal Recovery Funds allocation. Responsible for US Department of the Treasury (Treasury) and Uniform Guidance compliance, ARPA policy advisory, federal and internal reporting, and technical assistance to the Department of Budget and Management and State agencies.

Project Advisor | New York City Office of Management and Budget, American Rescue Plan Act Support and Advisory Services | Hagerty Consulting, Inc.

- » Provided direction and guidance to Hagerty team that supports the New York City Office of Management and Budget in compliance with US Treasury program guidance and Uniform Guidance, organizational design/implementation, and federal reporting associated their \$5.9 billion State and Local Fiscal Relief Funds through ARPA/

Program Manager and Subject Matter Expert | Huntsville Utilities, Alabama, Federal Funds Strategy | Hagerty Consulting, Inc.

- » Provide oversight and subject matter expertise to Hagerty team that supports Huntsville Utilities in the assessment of unfunded priorities and the identification of federal funds. Advise on water, electric, and cyber programs within the IJA.

Employment History

Hagerty Consulting, Inc., Deputy Director, 2023 to Present

Hagerty Consulting, Inc., Senior Manager, 2021 to 2023

Hageman Consulting, Inc., Independent Consultant, 2019 to 2021

City of Detroit, Michigan Government, Chief of Staff, Office of the Chief Financial Officer, 2015 to 2019

John H. Hageman

Project Executive/Subject Matter Expert



Public Consulting Group, Business Analyst, 2013 to 2015

AmeriCorps VISTA, Hearts & Hands of Indiana, Volunteer Coordinator, 2012 to 2013

Obama For America, Deputy Field Organizer, 2012

Indiana University, School of Public Health, Research Assistant, 2012

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Program Manager



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Education

- » MS, Finance, Pace University, 2016
- » BA, Philosophy, Minor: Political Science, Rutgers University, 2007

Training and Certifications

- » FEMA courses: IS-01012, IS-1001, IS, 01000, IS-01005, IS-01006, IS-01007, IS-01008, IS-01009, IS-01014, IS-01015, IS-01018

Relevant Highlights

- » 10+ years as Public Sector consultant
- » Directly manage FEMA's 428 Public Assistance Alternative Procedures (PAAP) grants for NYC agencies in over \$5 billion
- » Financial management in over \$8 billion in COVID-19 for PPE-related costs for New York City
- » Financial management and overall policy support in over \$6 billion in CDBG-DR grants for four states and one US Territory

Professional Biography

Mr. Christopher Delgado serves as a Manager in the Recovery Division for Hagerty Consulting, Inc. (Hagerty) with over 10 years of experience in serving public sector clients in navigating the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, Hazard Mitigation Grant Program (HMGP), Novel Coronavirus (COVID-19) funding programs, and Community Development Block Grant, Disaster Recovery (CDBG-DR) under the (US) Department of Housing and Urban Development (HUD).

Mr. Delgado has submitted and received over \$300 million in FEMA PA and over \$100 million in COVID-19 grant reimbursements for personal protective equipment (PPE)-related costs for New York City (NYC). Mr. Delgado has helped guide the recovery efforts for Manatee County, State of North Carolina, Saint Louis, City of Panama City Beach, Texas General Land Office (GLO), and the California Department of Housing and Community Development (HCD) by providing fiscal and policy support.

Prior to joining Hagerty, Mr. Delgado helped the US Virgin Islands (USVI) Housing Finance Authority by successfully submitting the territories action plan and receiving approval on the USVI's four Tranches in over \$1.8 billion. In addition, he has helped the New York State Governor's Office of Storm Recovery by providing financial oversight and grant management support for Hurricane Sandy Recovery.

Relevant Professional Experience

Certification Checklists Lead & Policy Development | Manatee County, Hurricanes Debby, Helene, and Milton Recovery | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements and the Citizen Participation Plan in accordance with HUD regulations, ensuring timely and accurate submissions.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.
- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Christopher Delgado

Program Manager



Subject Matter Expert | New York City Mayor's Office of Management and Budget, Hurricane Sandy & COVID-19 Recovery | Hagerty Consulting, Inc.

- » Provided financial oversight and management on the \$10 billion Sandy FEMA PA, \$8 billion COVID-19, \$368 million Federal Highway Administration (FHWA), and \$310 million Federal Transit Administration (FTA) grants awarded to NYC.
- » Manage, update, and adjust financial data in the Office of Management and Budget's (OMB's) grants management system.
- » Provided subject matter expertise in reconciling expenditures and submitting progress and closeout payments for over \$400 million in reimbursements.
- » Directly manage FEMA's 428 PAAP grants for NYC agencies over \$5 billion.
- » Collaborated with OMB Agency Task Forces in setting up revenue structures for anticipated FEMA, FHWA, FTA, and COVID-19 revenue, and ensure expense and revenue consistency throughout the fiscal reconciliation process.
- » Analyzed, forecasted, reported, and presented financial data to senior management, OMB, and city agencies.
- » Assisted the Closeout Management Team in the financial reconciliation process.
- » Evaluated Project Worksheets (PWs) to determine grant eligibility for agency expenditures.
- » Conducted fiscal analysis on grant obligations, PW expenditures, and earned revenue.

Closeout Specialist | Florida Division of Emergency Management, COVID-19 Recovery | Hagerty Consulting, Inc.

- » Coordinated the closeout process for large-scale Covid-19 projects, ensuring compliance with federal regulations and timely submission of required documentation.
- » Reviewed and validated PWs, invoices, and supporting documentation to confirm eligibility and proper cost allocation.
- » Liaised with applicants, state agencies, and FEMA representatives to resolve discrepancies and facilitate grant reconciliation.
- » Managed data tracking systems to monitor project status, financial progress, and audit readiness.
- » Prepared closeout packages and final reports for submission to FEMA, ensuring completeness and accuracy.

Subject Matter Expert | State of North Carolina, Tropical Storm Helene Recovery | Hagerty Consulting, Inc.

- » Provided support in developing the Action Plan for the \$1.4B HUD grant awarded to the State of North Carolina.
- » Coordinated the preparation and submission of required reports, ensuring adherence to HUD's compliance standards and deadlines.
- » Reviewed and analyzed grant documentation to identify discrepancies and implement corrective actions for compliance improvements.
- » Reviewed unmet needs data and incorporated findings into the Action Plan to ensure effective allocation of resources and alignment with HUD's priorities.

Certification Checklists Lead & Policy Development | St. Louis County, Missouri Severe Storms and Flooding | Hagerty Consulting, Inc.

- » Assisted the County in submitting the Financial Management and Grant Compliance Certification requirements in accordance with HUD regulations, ensuring timely and accurate documentation.
- » Led the development and implementation of certification checklists, ensuring compliance with regulatory requirements.

Christopher Delgado

Program Manager



- » Developed and revised policies to streamline certification processes, improving efficiency and accuracy across departments.

Senior Specialist | City of Panama City Beach, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Supported the City in the infrastructure grant application writing, research, and guidance process.

Recovery Program Specialist | Texas General Land Office, Hurricane Harvey Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$3.2 billion grant for the Homeowner Assistance Program (HAP) from HUD awarded to GLO.
- » Cross walked both the City of Houston's and the GLO's HAP guidelines and implementation forms.
- » Developed the Affirmative Fair Housing Marketing Plan and eligibility policies and procedures.
- » Provided guidance on complaints and appeals, and temporary relocation policies and procedures.
- » Drafted waivers and memos for the HAP Program.

Senior Grant Manager | California Department of Housing and Community Development, Wildfires, Flooding, Mudflows, and Debris Flows Recovery | Hagerty Consulting, Inc.

- » Provided program support and oversight for the launch of the \$48 million grant for the Owner-Occupied Rehabilitation and Reconstruction Program from HUD awarded to HCD.
- » Provided guidance on the CDBG-DR Risk Assessment and Monitoring Plan.
- » Developed cross cutting reporting requirements, forms, templates, policies and procedures needed for grant compliance such as Labor Compliance, Section 3, *Uniform Relocation Act*, and recordkeeping.

Employment History

Hagerty Consulting, Inc., Manager - Recovery Division, 2019 to Present

Witt O'Brien's, Subject Matter Expert, 2018 to 2019

Winsor Consult Group, Finance Manager, 2014 to 2018

Saint Barnabas Medical Center, Administrative Support, 2013 to 2014

PMSI Direct Marketing and Support Services, Data Analyst, 2005 to 2023

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.

Nathan Beam

Grants Management Specialist



- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.
- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Nathan Beam

Grants Management Specialist



Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.
- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Education

- » Bachelor of Arts, Schreiner University

Training and Certifications

- » Project Management Certificate, Texas Tech University
- » Certified Grant Administrator, TxCDBG

Relevant Highlights

- » Secured and managed over \$30 million in program funding, ensuring compliance with financial regulations.
- » Developed program performance dashboards, enhancing transparency and decision-making.
- » Optimized program execution frameworks, improving efficiency by 25% through process improvements.

Professional Biography

Mr. Parker Harrison has over 20 years of program management experience with an emphasis on the Community Development Block Grant (CDBG), CDBG-Disaster Recovery (DR), HOME Investment Partnerships Program (HOME), and other federal funding streams. Proven leader in multi-million-dollar grant oversight, cross-sector collaboration, and compliance with federal statutory requirements. Adept in aligning programs with the United States Department of Housing and Urban Development (HUD) mandates, 2 Code for Federal Regulations (CFR) 200, *Davis-Bacon Act*, and other critical compliance areas. Known for building strong client relationships, facilitating strategic delivery, and driving community resilience through recovery and redevelopment.

Relevant Professional Experience

Application Specialist | GrantWorks

- » Wrote complex cross-functional project grants, ensuring seamless coordination between business units and external agencies.
- » Oversaw multi-million-dollar initiatives' program documentation, stakeholder reporting, and compliance monitoring.
- » Led financial analysis efforts, ensuring accurate forecasting, risk management, and process optimization.

Community Development Manager | City of Marshall, Texas

- » Developed the City's five-year Consolidated Plan, establishing a strategic framework to maximize HUD funding impact and align with the city's long-term development goals.
- » Automated community development processes, enhancing service efficiency and project outcomes.
- » Managed daily operations across multiple departments, including Code Enforcement, Building and Health Inspections, and Planning and Zoning, to ensure seamless and efficient service delivery.
- » Ensured compliance with CDBG-funded activities, adhering to all federal and state regulations to maintain funding eligibility and program integrity.

Community Development Manager | City of Tyler, Texas

- » Developed comprehensive Policies and Procedures for managing CDBG and HOME grant programs, ensuring compliance with federal, state, and local regulations.

- » Prepared detailed accomplishment reports on a weekly, monthly, and annual basis for City executive management, City Council, and HUD, fostering transparency and accountability.
- » Proposed and implemented strategies to optimize staff efficiency and resource utilization, streamlining the administration of community development plans and projects.
- » Collaborated with citizens, program participants, and contractors to address program-related issues and successfully mediate and resolve complaints.
- » Monitored and applied local, state, and federal legislation and guidelines to ensure alignment with community development and housing activities.

Community Development Administrator | City of Longview, Texas

- » Directed the planning, implementation, and administration of community development and affordable housing programs, aligning activities with federal and HUD regulations.
- » Prepared, updated, and submitted key documents, including the City's Annual Consolidated Action Plan and Consolidated Annual Performance and Evaluation Report, ensuring timely and accurate reporting.
- » Updated administrative plan documents to maintain compliance with HUD and Federal housing standards.
- » Conducted comprehensive research and analysis on housing trends, population growth, transportation, and economic issues to provide actionable recommendations for short- and long-term development plans.
- » Administered and monitored budgets for CDBG, HOME, and Shelter Plus Care grant programs, ensuring optimal allocation and expenditure of funds.
- » Oversaw Home Ownership, Lead-Based Paint, Fair Housing, and other community development programs, tracking performance and compliance.
- » Evaluated sub-recipient and contractor expenditures for accuracy and compliance, processed financial submissions to HUD, and managed drawdowns of grant funds.
- » Collaborated with HUD personnel on program activities, compliance monitoring, and financial audits, addressing and resolving any issues effectively.
- » Delivered detailed program reports to City executive management, City Council, and HUD, maintaining transparency and fostering trust among stakeholders.

Economic Development Management | East Texas Council of Governments

- » Developed and executed regional strategic programs, enhancing economic growth and operational efficiency.
- » Provided financial oversight, optimizing budgets and monitoring program expenditures to align with compliance standards.
- » Established key performance metrics and dashboard reporting systems to track program progress.

Grants Consultant | 2H Realty and Consulting Group

- » Led the development and management of large-scale programs across multiple sectors, aligning initiatives with strategic objectives.
- » Designed and implemented program governance frameworks, ensuring efficiency, accountability, and regulatory compliance.

Parker Harrison

Grants Management Specialist



-
- » Managed financial planning and secured over \$30 million in funding, ensuring program sustainability and impact.
 - » Collaborated with internal and external stakeholders to drive program milestones and resolve operational challenges.

Employment History

2H Realty and Consulting Group, Grants Consultant, 2020 to Present

East Texas Council of Governments, Economic Development Manager, February 2024 to May 2024

GrantWorks, Application Specialist, 2020 to 2023

City of Tyler, Community Development Manager, 2018 to 2019

City of Longview, Community Development Administrator, 2011 to 2018

2H Realty Group, Real Estate Broker, 2005 to 2017

Hill County Home Opportunity Council, Executive Director, 2008 to 2011

Hill County Home Opportunity Council, Program Director, 2005 to 2007

Resumes: Task 6

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » BA, Economics and German Language, George Mason University, 1989
- » Graduate Credit Hours (Master of Divinity, 34), Wesley Theological Seminary, 1993

Trainings/Certifications

- » Project Management Certificate, Cornell University, March 2022
- » Certified HOME Program Specialist, 2009
- » Public Housing Manager, 1996
- » Housing Quality Standards (HUD HQS), 1995

Relevant Highlights

- » Community Development Block Grants for Disaster Recovery (CDBG-DR), Mitigation (CDBG-MIT), and Coronavirus (CDBG-CV)
- » Financial and Programmatic Auditing of Federal Grant Subrecipients
- » Policy Development
- » Program Management
- » Affordable Housing Program Implementation and Administration
- » LIHTC
- » Economic Development
- » Infrastructure Project Management

Professional Biography

Mr. David Sidney Bennett is a disaster recovery management professional with over 33 years of experience providing housing-specific programming. In his work, he routinely provides technical assistance under the United States Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) Disaster Recovery (-DR), Mitigation (-MIT), and Coronavirus (-CV); Community Compass; and Enterprise Community Partners programs to grant recipients and subrecipients, including within the State of Florida. In recent years, Mr. Bennett has served as a project/grant manager and general technical assistance resource supporting CDBG, CDBG-DR, CDBG-MIT, CDBG-CV; *American Rescue Plan Act*; Economic Development Administration (EDA), Community Services Block Grant (CSBG), Section 108 loan securitization; HOME Investment Partnerships, Section 811; and Low-Income Housing Tax Credit (LIHTC) monitoring for both fiscal and programmatic compliance (including complex multi-layered funded projects). Mr. Bennett has developed CDBG program manuals, environmental review templates, and subrecipient monitoring forms that HUD used as models for other entitlement communities and participating jurisdictions.

Relevant Professional Experience

Senior Subject Matter Expert | Community Development Block Grant – Disaster Recovery Portfolio Oversight | Manatee County, FL | Hagerty Consulting, Inc.

- » Provided SME technical assistance to key Manatee County CDBG-DR Action Plan/Unmet Needs Assessment writing/analysis phase
- » Reviewed, edited and provided guidance on Action Plan envisioned project specific policies and procedures that are being developed.

Project Executive | Action Plan and Unmet Needs Assessment | St. Louis County, Missouri | Hagerty Consulting, Inc.

- » Served as liaison between County and Hagerty Consulting on project and scope. Provided key project staff with subject matter expertise (SME) and technical assistance to include review/edit of entire Action Plan and documents supporting the Financial Certifications submission to HUD. Provided the County with general programmatic SME technical assistance including distilling and understanding federal statutory requirements.

David Sidney Bennett

Project Executive/Subject Matter Expert



Senior Subject Matter Expert | Lee County, Florida, Recovery and Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided review of and comment on featured projects to be submitted by Hagerty Consulting clients including Cape Coral and Estero Beach that are subrecipient partners to Lee County.
- » Ensured that projects were compliant with Lee County award expectations and met federal crosscutting statutory compliance

Senior Subject Matter Expert | Panama City Beach, Florida, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided SME technical assistance primarily in the areas of labor standards compliance.

Senior Subject Matter Expert | Detroit-Dearborn, Michigan, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » As Hagerty Consulting's role providing HUD Community Compass Technical Assistance to these two cities, provided review of single family housing programmatic standards applicable to affordable housing programs and issues resolutions to client.

Project Advisor | Montgomery County, Texas, San Jacinto Watershed Infrastructure Project | Hagerty Consulting, Inc.

- » Directly serving as key staff on \$60M CDBG-MIT Montgomery County San Jacinto Watershed Infrastructure Project following needs identified by County and State government.

Project Advisor | Asheville, North Carolina, Post-Hurricane Helene Disaster Response and Recovery | Hagerty Consulting, Inc.

- » Assisted in completing an Action Plan, Financial Certifications, and various procedures and policies for the State of North Carolina resulting from Hurricane Helene.

Program Manager/Lead Subject Matter Expert | Lee County, Florida, Community Development Block Grant – Disaster Recovery Oversight Management | HGA

- » Led a team of professionals embedded in the Lee County, Florida Department of Strategic Resources and Government Affairs that assist the County in planning, designing, and implementing programs funded under the \$1.1 billion allocation.
- » Maintained funding compliance, timely and appropriate expenditure of funds, procurement of professional and construction services, and maintained all aspects of compliance.
- » Drafted and assisted County in developing policies to govern the allocation (infrastructure, planning, public services, multi/single family housing reconstruction/rehabilitation/new construction), notice of funding opportunity availability to subrecipients, subrecipient agreements, internal processes and financial management, and ensure full statutory regulatory compliance.
- » Served as lead subject matter expert on all programmatic and regulatory compliance issues to both HGA and County staff.
- » Assisted County, as needed, with Action Plan Amendments and Substantial Amendments, and during federal, state, and self monitoring visits/audits.

David Sidney Bennett

Project Executive/Subject Matter Expert



Regulatory Compliance Officer | Puerto Rico Department of Housing, Oversight Management Services for United States Department of Housing and Urban Development Mitigation Infrastructure Programs | HGA

- » Oversaw project compliance with applicable federal, state, and local regulations.
- » Ensured compliance with required National Objectives; cross-cutting guides; and the *Davis Bacon Act*, Section 3, Urban Redevelopment Authority, and Environmental Review requirements.
- » Evaluated proposed activities for eligibility under federal program guidelines.
- » Served as a subject matter expert on healthcare set-aside projects and billion-dollar transportation projects.

Technical Advisor | Department of Housing and Urban Development Community Compass and Enterprise Community Foundation, Technical Assistance | HGA

- » Developed and presented technical assistance training for HUD CDBG-DR, CDBG Entitlement, and CDBG-MIT grant recipients and subrecipients.
- » Presented webinar synchronous training to 78 subrecipient municipios and multiple state agencies in Puerto Rico.
- » Provided technical assistance to date in the areas of Environmental Review Records, Economic Development, *Uniform Relocation Assistance and Real Property Acquisition Act*, Financial Management, Subrecipient Management, Section 504/ADA, Section 3 and Minority and Women-Owned Business Enterprises, *Davis Bacon* and Related Acts Labor compliance, Procurement, development of Systems of Record, and Disaster Recovery Grants Reporting System Reporting and Compliance.

Program Policy Subject Matter Expert | Texas Back in Business Economic Revitalization Program | Texas General Land Office | HGA

- » Implemented policy and program delivery protocols for the Economic Revitalization Program, which serves more than 2,500 business applicants in economic stabilization and recovery efforts following Hurricane Harvey.
- » Worked in tandem with the General Land Office (GLO) and imbedded contract staff to develop eligibility and underwriting processes to guide staff in evaluating applications and providing grant funding to eligible businesses in 49 most impacted and distressed counties.
- » Served as lead policy staff for GLO leadership, providing expert guidance on federal policy and best practices on this novel economic development undertaking that has not previously been provided under this model in the CDBG-DR space.

Employment History

Hagerty Consulting, Inc., CDBG-DR Practice Leader - Recovery, 2024

HGA, Program Manager and Senior Consultant, 2015 to 2024

Institute for Building Technology and Safety, Senior Manager – Community Development Services, 2014 to 2015

Arlington County Government, Federal Programs Coordinator, 2008 to 2014

Loudoun County Government, Manager of Strategic Initiatives and Communications, 2006 to 2008

Fairfax County Government, Management Analyst II, 2004 to 2006

Fairfax County Government, Housing Community Developer, 1994 to 2004

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



-
- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Master of Public Policy, Harvard Kennedy School, 2023
- » BA, Public Policy, University of Chicago, 2017

Relevant Highlights

- » Federal grant management and administration, including experience with the DRGR
- » CDBG-DR and CDBG-MIT administration
- » Experience with DRGR

Professional Biography

Ms. Leah Kessler is a disaster recovery and community development professional with specialized experience in climate resiliency. As a Presidential Management Fellow, she supported multiple offices within the United States Department of Housing and Urban Development (HUD) where she supported disaster recovery, guided recipients of the Community Development Block Grant-Disaster Recovery (CDBG-DR), served as a subject matter expert for the Disaster Recovery Grant Reporting (DRGR) System, and provided technical assistance for CDBG applicants and recipients. In addition, she has supported the National Oceanic and Atmospheric Administration (NOAA) with spearheading an equitable grantmaking initiative to increase access to climate resilience and adaptation grants, improving agency grantmaking efficiency, and integrating equity into NOAA-wide policies.

Relevant Professional Experience

Recovery Consultant | Montgomery County, Texas, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided technical support for Montgomery County's approximate \$70 million CDBG-Mitigation (-MIT) grant program.
- » infrastructure initiative, contributing to the planning, design, and implementation of mitigation and resilience projects.
- » Authored comprehensive policies and procedures for Section 3, *Davis-Bacon Act*, *Uniform Relocation Assistance and Real Property Acquisition Policies Act* (URA), and Environmental Review Requirements, ensuring federal compliance and streamlining program operations.
- » Provided strategic guidance on Section 3 and URA implementation, advising County leadership on best practices to minimize displacement and optimize community benefits.

Management and Program Analyst | United States of Department of Housing and Urban Development, Office of Disaster Recovery

- » Advised department leadership on housing policy and community development strategies, shaping affordable housing solutions that expanded access for low- and moderate-income residents.

Leah Kessler

Program Manager



- » Oversaw and optimized federally funded disaster recovery and resilience grants through CDBG-DR, improving fund allocation and compliance while strengthening state and local governments' ability to implement risk mitigation and long-term recovery strategies.
- » Led regulatory and policy analysis, communicating complex federal programmatic guidelines, and advising New York State grant recipients on CDBG-DR implementation to maximize community impact.
- » Provided hands-on technical assistance to grantees, guiding them through federal regulations, conducting desk reviews and audits, and recommending corrective actions as needed.
- » Served as a subject matter expert on the DRGR System, a national database for managing and tracking CDBG-DR grants, ensuring compliance and effective grant oversight.

Special Assistant and Equity Advisor | National Oceanic and Atmospheric Administration (on detail for Department of Housing and Urban Development)

- » Spearheaded NOAA's equitable climate funding initiative, increasing access to climate resilience and adaptation grants for frontline communities. Developed a 100-page guide, user-friendly grant portal, and bias awareness training, ensuring federal funding supported equitable environmental outcomes.
- » Led the creation of NOAA's first-ever Organizational Values—Inclusion, Innovation, and Integrity—securing buy-in from 12,000 employees to integrate these values into agency culture and operations.
- » Developed NOAA's Equity Framework and Equitable Climate Services Action Plan, embedding equity across the agency's funding, programs, and operations.

Management and Program Analyst/Presidential Management Fellow | Department of Housing and Urban Development, Office of Block Grant Assistance

- » Advised entitlement communities on effective management and implementation of CDBG funds, ensuring compliance with federal regulations while maximizing funding impact for community development initiatives.
- » Led data analysis and impact assessments using PowerBI and Microsoft Access, generating insights that improved program evaluation and informed data-driven decision-making for senior leadership.
- » Evaluated and recommended applications for HUD's Pathways to Removing Obstacles to Housing program, supporting local governments reducing barriers to and expanding the supply of affordable housing.
- » Provided expert guidance on the Integrated Disbursement and Information System, a national database for administering and reporting on CDBG, ensuring proper fund management and regulatory compliance.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2025 to Present

Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2024 to 2025

National Oceanic and Atmospheric Administration (on detail), Special Assistant and Equity Advisor (Presidential Management Fellow, 2024

Leah Kessler

Program Manager



Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2023 to 2024

Harvard's Center for Public Leadership, Research Assistant, 2022 to 2023

Alaska Venture Fund, Consultant, 2022 to 2023

City of Anaheim, Mayoral Transition Term Fellow, January 2023

Office of Governor DeWine, Michael S. Dukakis Summer Fellow, June 2022 to August 2022

HeartShare St. Vincent's Services, Case Planner/2019 Children's Corps Fellow, 2019 to 2021

The Harman Firm, LLP, Law Clerk/Paralegal, 2017 to 2019

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.

Nathan Beam

Grants Management Specialist



- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.
- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Nathan Beam

Grants Management Specialist



Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.
- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Grants Management Specialist



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Resumes: Task 7

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » BA, Economics and German Language, George Mason University, 1989
- » Graduate Credit Hours (Master of Divinity, 34), Wesley Theological Seminary, 1993

Trainings/Certifications

- » Project Management Certificate, Cornell University, March 2022
- » Certified HOME Program Specialist, 2009
- » Public Housing Manager, 1996
- » Housing Quality Standards (HUD HQS), 1995

Relevant Highlights

- » Community Development Block Grants for Disaster Recovery (CDBG-DR), Mitigation (CDBG-MIT), and Coronavirus (CDBG-CV)
- » Financial and Programmatic Auditing of Federal Grant Subrecipients
- » Policy Development
- » Program Management
- » Affordable Housing Program Implementation and Administration
- » LIHTC
- » Economic Development
- » Infrastructure Project Management

Professional Biography

Mr. David Sidney Bennett is a disaster recovery management professional with over 33 years of experience providing housing-specific programming. In his work, he routinely provides technical assistance under the United States Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) Disaster Recovery (-DR), Mitigation (-MIT), and Coronavirus (-CV); Community Compass; and Enterprise Community Partners programs to grant recipients and subrecipients, including within the State of Florida. In recent years, Mr. Bennett has served as a project/grant manager and general technical assistance resource supporting CDBG, CDBG-DR, CDBG-MIT, CDBG-CV; *American Rescue Plan Act*; Economic Development Administration (EDA), Community Services Block Grant (CSBG), Section 108 loan securitization; HOME Investment Partnerships, Section 811; and Low-Income Housing Tax Credit (LIHTC) monitoring for both fiscal and programmatic compliance (including complex multi-layered funded projects). Mr. Bennett has developed CDBG program manuals, environmental review templates, and subrecipient monitoring forms that HUD used as models for other entitlement communities and participating jurisdictions.

Relevant Professional Experience

Senior Subject Matter Expert | Community Development Block Grant – Disaster Recovery Portfolio Oversight | Manatee County, FL | Hagerty Consulting, Inc.

- » Provided SME technical assistance to key Manatee County CDBG-DR Action Plan/Unmet Needs Assessment writing/analysis phase
- » Reviewed, edited and provided guidance on Action Plan envisioned project specific policies and procedures that are being developed.

Project Executive | Action Plan and Unmet Needs Assessment | St. Louis County, Missouri | Hagerty Consulting, Inc.

- » Served as liaison between County and Hagerty Consulting on project and scope. Provided key project staff with subject matter expertise (SME) and technical assistance to include review/edit of entire Action Plan and documents supporting the Financial Certifications submission to HUD. Provided the County with general programmatic SME technical assistance including distilling and understanding federal statutory requirements.

David Sidney Bennett

Project Executive/Subject Matter Expert



Senior Subject Matter Expert | Lee County, Florida, Recovery and Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided review of and comment on featured projects to be submitted by Hagerty Consulting clients including Cape Coral and Estero Beach that are subrecipient partners to Lee County.
- » Ensured that projects were compliant with Lee County award expectations and met federal crosscutting statutory compliance

Senior Subject Matter Expert | Panama City Beach, Florida, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided SME technical assistance primarily in the areas of labor standards compliance.

Senior Subject Matter Expert | Detroit-Dearborn, Michigan, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » As Hagerty Consulting's role providing HUD Community Compass Technical Assistance to these two cities, provided review of single family housing programmatic standards applicable to affordable housing programs and issues resolutions to client.

Project Advisor | Montgomery County, Texas, San Jacinto Watershed Infrastructure Project | Hagerty Consulting, Inc.

- » Directly serving as key staff on \$60M CDBG-MIT Montgomery County San Jacinto Watershed Infrastructure Project following needs identified by County and State government.

Project Advisor | Asheville, North Carolina, Post-Hurricane Helene Disaster Response and Recovery | Hagerty Consulting, Inc.

- » Assisted in completing an Action Plan, Financial Certifications, and various procedures and policies for the State of North Carolina resulting from Hurricane Helene.

Program Manager/Lead Subject Matter Expert | Lee County, Florida, Community Development Block Grant – Disaster Recovery Oversight Management | HGA

- » Led a team of professionals embedded in the Lee County, Florida Department of Strategic Resources and Government Affairs that assist the County in planning, designing, and implementing programs funded under the \$1.1 billion allocation.
- » Maintained funding compliance, timely and appropriate expenditure of funds, procurement of professional and construction services, and maintained all aspects of compliance.
- » Drafted and assisted County in developing policies to govern the allocation (infrastructure, planning, public services, multi/single family housing reconstruction/rehabilitation/new construction), notice of funding opportunity availability to subrecipients, subrecipient agreements, internal processes and financial management, and ensure full statutory regulatory compliance.
- » Served as lead subject matter expert on all programmatic and regulatory compliance issues to both HGA and County staff.
- » Assisted County, as needed, with Action Plan Amendments and Substantial Amendments, and during federal, state, and self monitoring visits/audits.

David Sidney Bennett

Project Executive/Subject Matter Expert



Regulatory Compliance Officer | Puerto Rico Department of Housing, Oversight Management Services for United States Department of Housing and Urban Development Mitigation Infrastructure Programs | HGA

- » Oversaw project compliance with applicable federal, state, and local regulations.
- » Ensured compliance with required National Objectives; cross-cutting guides; and the *Davis Bacon Act*, Section 3, Urban Redevelopment Authority, and Environmental Review requirements.
- » Evaluated proposed activities for eligibility under federal program guidelines.
- » Served as a subject matter expert on healthcare set-aside projects and billion-dollar transportation projects.

Technical Advisor | Department of Housing and Urban Development Community Compass and Enterprise Community Foundation, Technical Assistance | HGA

- » Developed and presented technical assistance training for HUD CDBG-DR, CDBG Entitlement, and CDBG-MIT grant recipients and subrecipients.
- » Presented webinar synchronous training to 78 subrecipient municipios and multiple state agencies in Puerto Rico.
- » Provided technical assistance to date in the areas of Environmental Review Records, Economic Development, *Uniform Relocation Assistance and Real Property Acquisition Act*, Financial Management, Subrecipient Management, Section 504/ADA, Section 3 and Minority and Women-Owned Business Enterprises, *Davis Bacon* and Related Acts Labor compliance, Procurement, development of Systems of Record, and Disaster Recovery Grants Reporting System Reporting and Compliance.

Program Policy Subject Matter Expert | Texas Back in Business Economic Revitalization Program | Texas General Land Office | HGA

- » Implemented policy and program delivery protocols for the Economic Revitalization Program , which serves more than 2,500 business applicants in economic stabilization and recovery efforts following Hurricane Harvey.
- » Worked in tandem with the General Land Office (GLO) and imbedded contract staff to develop eligibility and underwriting processes to guide staff in evaluating applications and providing grant funding to eligible businesses in 49 most impacted and distressed counties.
- » Served as lead policy staff for GLO leadership, providing expert guidance on federal policy and best practices on this novel economic development undertaking that has not previously been provided under this model in the CDBG-DR space.

Employment History

Hagerty Consulting, Inc., CDBG-DR Practice Leader - Recovery, 2024

HGA, Program Manager and Senior Consultant, 2015 to 2024

Institute for Building Technology and Safety, Senior Manager – Community Development Services, 2014 to 2015

Arlington County Government, Federal Programs Coordinator, 2008 to 2014

Loudoun County Government, Manager of Strategic Initiatives and Communications, 2006 to 2008

Fairfax County Government, Management Analyst II, 2004 to 2006

Fairfax County Government, Housing Community Developer, 1994 to 2004

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



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- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Master of Science, Urban and Regional Planning, Land Use, Environmental Planning, and GIS, University of Iowa
- » Bachelor of Arts, Political Science, University of Iowa

Relevant Highlights

- » GIS capabilities with strong environmental review and project management experience
- » RSF experience, including application at the State and local level to support communities following disasters
- » Planning and strategic design

Professional Biography

Mr. Doug Ongie is a grant management professional with 12 years of expertise in Community Development Grant Program Disaster Recovery (CDBG-DR) programs and compliance. He has leveraged his background in urban planning and CDBG-DR grant administration for the City of Iowa City, Iowa and provided CDBG-DR technical assistance as a consultant to clients in Colorado, South Carolina, Florida, and California. He has used his background in Geographic Information Systems (GIS) to lead building and environmental conditions assessments of over 250 properties. He is also experienced in conducting Phase 1 environmental site assessments, evaluating historical property uses impact on environment and / or human health, including effects on soil or groundwater. Mr. Ongie administered a \$15.2 million United States (US) Department of Housing and Urban Development (HUD) CDBG-DR grant for the acquisition of 54 residential properties damaged after the 2008 Iowa floods.

He has experience with a range of CDBG-DR program types, including housing buyouts for the City of Iowa City and Boulder County, Colorado; housing replacement, buyout, and business programs for Richland County and Lexington County, South Carolina; and currently stand-alone infrastructure, FEMA match, and infrastructure mitigation programs for the State of California. Mr. Ongie has provided comprehensive support for CDBG-DR and CDBG-Mitigation (CDBG-MIT) grants through program design creation, development of program policies and procedures, standard operating procedure development, action plan updates, budget planning, project closeout, and cross-cutting federal regulation compliance.

Relevant Professional Experience

Unmet Needs Assessment Lead | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan | Hagerty Consulting, Inc.

- » Directed the development of the County's CDBG-DR Unmet Needs Assessment (UNA), analyzing disaster impacts on housing, infrastructure, and the economy to guide allocation of federal recovery funds.
- » Led data collection and analysis efforts, synthesizing FEMA, SBA, insurance, and local datasets to quantify unmet housing needs, displacement trends, and vulnerable populations.
- » Authored technical reports and narratives that translated complex data into actionable findings, ensuring clarity and compliance with HUD standards.

- » Provided subject matter expertise on disaster impacts, resilience, and ensuring recovery investments addressed both immediate needs and long-term community vulnerabilities.

Programmatic Subject Matter Expert | Community Development Block Grant-Disaster Recovery, California Department of Housing and Community Development | Hagerty Consulting, Inc.

- » Serving as the CDBG-DR Infrastructure Program lead as part of the grant management team. Providing project management and technical assistance support to the California Department of Housing and Community Development (HCD) on the \$36.2 million CDBG-DR Infrastructure Program for 2017 disasters, \$317.4 million CDBG-DR Infrastructure Program for 2018 disasters, \$7.6 million CDBG-DR and Federal Emergency Management Agency (FEMA) Public Assistance (PA) Match Program for 2020 disasters, and \$142.4 million CDBG-DR Infrastructure Program and Mitigation Resilient Infrastructure for 2023/2024 disasters.
- » CDBG-DR Infrastructure Program includes developing program policies and procedure documents, standard operating procedures for program implementation, and technical assistance with cross-cutting federal requirements including duplication of benefits, environmental review, the Section 3 Final Rule, Davis-Bacon and Related Acts, and compliance with financial and procurement requirements in 2 CFR 200.
- » Support the grant management team with program design and implementation of CDBG-Mitigation (CDBG-MIT) programs for resilient infrastructure projects.
- » Supported with the development of the Owner-occupied Rehabilitation and Reconstruction (OOR) Program policies and procedures to rebuild homes damaged by the 2017 and 2018 disasters in California.
- » Developed a post-disaster housing strategy for the State of California. The plan described the roles and responsibilities of a State-Led Housing Solutions Task Force including critical processes, procedures, and activities that should be carried out to support the success of a direct housing mission.

Joint Field Office Planning Specialist | California Governor's Office of Emergency Services, Surge Capacity Staffing | Hagerty Consulting, Inc.

- » Provided support to the California Governor's Office of Emergency Services (CalOES) with enhancing the California Disaster Recovery Framework through the development and adoption of six Rescue Support Function (RSF) operational annexes.
- » Identified important recovery considerations and priorities as well as conducting workshops, webinars, and interviews to engage key stakeholders in RSF development.
- » Due to Hagerty's good work on this planning operation and their superior understanding of the State's response and recovery needs, Hagerty was selected by CalOES to provide surge staffing needs because of the Camp, Woolsey, and Hill Fires.

Disaster Recovery Specialist | Tetra Tech

- » Served as the CDBG-DR Project Lead for Richland County, South Carolina on a \$23.5 million grant. Responsibilities included preparing environmental reviews for all activities to ensure compliance with the *National Environmental Policy Act*, setup and implementation of a residential rehabilitation and replacement program, business assistance program, and an infrastructure project that will make the county more resilient to future disasters.

Doug Ongie

Program Manager



- » Served as a CDBG-DR Project Lead providing technical assistance, policy guidance, application support, and project implementation oversight for Boulder County, Colorado.
- » Supported the development of applications totaling over \$11 million in the Round 1 CDBG-DR allocation for Boulder County.
- » Assisted with the development of Flood Management Assistance and Hazard Mitigation Grant Program applications for clients in Colorado, Texas, and South Carolina.
- » Provided program support and data management for FEMA PA projects.

Associate Planner | Community Development Division | City of Iowa City

- » Administered a \$15.2 million CDBG-DR grant for the acquisition of 54 residential properties damaged after the 2008 floods, a \$2 million CDBG grant for flood-impacted businesses offering rental assistance and loan interest supplements, a CDBG-DR grant for down payment assistance on 141 new homes through the Single-Family New Construction Program, and public service and public facility projects through the City's annual CDBG allocation.
- » Administered \$2.4 million in State Jumpstart disaster grant assistance programs for flood survivors offering repair assistance, interim mortgage assistance, and down payment assistance.
- » Prepared disaster grant budgets and draw requests.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Consultant, 2019 to Present

Impact7G, Inc., Environmental Planner, 2017 to 2019

Tetra Tech, Disaster Recovery Specialist, 2014 to 2017

City of Iowa City, Associate Planner, 2009 to 2014

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Julia Zachgo

Grants Management Specialist



Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.
- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.

Nathan Beam

Grants Management Specialist



- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.

Nathan Beam

Grants Management Specialist



- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Resumes: Task 8

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » Bachelor of Arts, Indiana University College of Arts and Sciences, 2012

Training and Certifications

- » Professional Certificate in Municipal Finance, The University of Chicago Harris School of Public Policy, 2018
- » Chicago Public Library Foundation, Associate Board, Membership Committee, 2019 to Present

Relevant Highlights

- » Worked on the two largest financial crises in US history
- » Experience advising elected and senior appointed government officials
- » Fiscal management reform and restructuring expertise
- » Focuses on helping governments transform and rebuild their operations during critical crises
- » Experienced consulting professional with dedicated public service focus

Professional Biography

Mr. John H. Hageman is a Deputy Director at Hagerty Consulting, Inc. (Hagerty) with over a decade of experience in strategic management, public sector finance and administration, and restructuring and turnaround. At Hagerty, Mr. Hageman leads the firm's Federal Funds Management services, helping state and local governments identify, secure, manage, and implement federal funds with an emphasis on funding under the *American Rescue Plan Act (ARPA)*, *Infrastructure Investment and Jobs Act (IIJA)*, and *Inflation Reduction Act*. Mr. Hageman oversees a portfolio of engagements and Hagerty professionals who assist state and local governments in their administration of over \$14 billion in federal funds. Mr. Hageman specializes in helping governments recover from fiscal and economic distress and crises, having held critical, executive-level roles on the two largest municipal financial crises in United States (US) history.

Relevant Professional Experience

Project Executive | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Leads efforts within the County to administer Community Development Block Grant-Disaster Recover, including the development of the federally compliant Action Plan approved by the US Department of Housing and Urban Development.
- » Oversees overall design and implementation of the program for proper disbursement to community partners, including subrecipients and local stakeholders.

Project Executive | Manatee County, Florida, Department of Transportation Grant Writing | Hagerty Consulting, Inc.

- » Leads efforts within the County to locate, apply for, and manage Federal, State, nonprofit, foundation, corporate, and private grants for the benefit of citizens and visitors of Manatee County. Projects managed include support for the Transportation Ferry Grant, which serves resident passengers and visitors seeking to participate in economic investment and tourism activities.

John H. Hageman

Project Executive/Subject Matter Expert



Project Executive | State of Washington, Federal Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversees the state-wide Federal Funds Grant Writing Assistance Program for Washington to help local and tribal governments, businesses, nonprofits ports, and other resource-constrained communities apply for and access federal funds.

Project Executive | State of Wyoming, Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversee the state-wide Wyoming Grants Assistance Program (WYGAP), offering support to non-profit organizations, small businesses, local and tribal governments, and more in efforts to attain and manage federal funding.
- » Oversee efforts to produce grant opportunity scans, assessing potential programs for WYGAP users; technical assistance meetings and direct outreach; and, efforts to deliver comprehensive planning for integrating state and Federal funds into programmatic needs.
- » Oversee team responsible for planning and coordinating Wyoming Funding Summit, sponsored by the Governor and US Senators; lead team responsible for developing and delivering training sessions focused on the grants management lifecycle including pre-award and post-award grant management and compliance.

Program Manager | Maryland Department of Budget and Management, American Rescue Plan Act Administration and Management | Hagerty Consulting, Inc.

- » Leads Hagerty team that supports the State's \$3.7 billion Coronavirus State Fiscal Recovery Funds allocation. Responsible for US Department of the Treasury (Treasury) and Uniform Guidance compliance, ARPA policy advisory, federal and internal reporting, and technical assistance to the Department of Budget and Management and State agencies.

Project Advisor | New York City Office of Management and Budget, American Rescue Plan Act Support and Advisory Services | Hagerty Consulting, Inc.

- » Provided direction and guidance to Hagerty team that supports the New York City Office of Management and Budget in compliance with US Treasury program guidance and Uniform Guidance, organizational design/implementation, and federal reporting associated their \$5.9 billion State and Local Fiscal Relief Funds through ARPA/

Program Manager and Subject Matter Expert | Huntsville Utilities, Alabama, Federal Funds Strategy | Hagerty Consulting, Inc.

- » Provide oversight and subject matter expertise to Hagerty team that supports Huntsville Utilities in the assessment of unfunded priorities and the identification of federal funds. Advise on water, electric, and cyber programs within the IJA.

Employment History

Hagerty Consulting, Inc., Deputy Director, 2023 to Present

Hagerty Consulting, Inc., Senior Manager, 2021 to 2023

Hageman Consulting, Inc., Independent Consultant, 2019 to 2021

City of Detroit, Michigan Government, Chief of Staff, Office of the Chief Financial Officer, 2015 to 2019

John H. Hageman

Project Executive/Subject Matter Expert



Public Consulting Group, Business Analyst, 2013 to 2015

AmeriCorps VISTA, Hearts & Hands of Indiana, Volunteer Coordinator, 2012 to 2013

Obama For America, Deputy Field Organizer, 2012

Indiana University, School of Public Health, Research Assistant, 2012

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Program Manager



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Education

- » Master of Public Policy, Harvard Kennedy School, 2023
- » BA, Public Policy, University of Chicago, 2017

Relevant Highlights

- » Federal grant management and administration, including experience with the DRGR
- » CDBG-DR and CDBG-MIT administration
- » Experience with DRGR

Professional Biography

Ms. Leah Kessler is a disaster recovery and community development professional with specialized experience in climate resiliency. As a Presidential Management Fellow, she supported multiple offices within the United States Department of Housing and Urban Development (HUD) where she supported disaster recovery, guided recipients of the Community Development Block Grant-Disaster Recovery (CDBG-DR), served as a subject matter expert for the Disaster Recovery Grant Reporting (DRGR) System, and provided technical assistance for CDBG applicants and recipients. In addition, she has supported the National Oceanic and Atmospheric Administration (NOAA) with spearheading an equitable grantmaking initiative to increase access to climate resilience and adaptation grants, improving agency grantmaking efficiency, and integrating equity into NOAA-wide policies.

Relevant Professional Experience

Recovery Consultant | Montgomery County, Texas, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided technical support for Montgomery County's approximate \$70 million CDBG-Mitigation (-MIT) grant program.
- » infrastructure initiative, contributing to the planning, design, and implementation of mitigation and resilience projects.
- » Authored comprehensive policies and procedures for Section 3, *Davis-Bacon Act*, *Uniform Relocation Assistance and Real Property Acquisition Policies Act* (URA), and Environmental Review Requirements, ensuring federal compliance and streamlining program operations.
- » Provided strategic guidance on Section 3 and URA implementation, advising County leadership on best practices to minimize displacement and optimize community benefits.

Management and Program Analyst | United States of Department of Housing and Urban Development, Office of Disaster Recovery

- » Advised department leadership on housing policy and community development strategies, shaping affordable housing solutions that expanded access for low- and moderate-income residents.

Leah Kessler

Program Manager



- » Oversaw and optimized federally funded disaster recovery and resilience grants through CDBG-DR, improving fund allocation and compliance while strengthening state and local governments' ability to implement risk mitigation and long-term recovery strategies.
- » Led regulatory and policy analysis, communicating complex federal programmatic guidelines, and advising New York State grant recipients on CDBG-DR implementation to maximize community impact.
- » Provided hands-on technical assistance to grantees, guiding them through federal regulations, conducting desk reviews and audits, and recommending corrective actions as needed.
- » Served as a subject matter expert on the DRGR System, a national database for managing and tracking CDBG-DR grants, ensuring compliance and effective grant oversight.

Special Assistant and Equity Advisor | National Oceanic and Atmospheric Administration (on detail for Department of Housing and Urban Development)

- » Spearheaded NOAA's equitable climate funding initiative, increasing access to climate resilience and adaptation grants for frontline communities. Developed a 100-page guide, user-friendly grant portal, and bias awareness training, ensuring federal funding supported equitable environmental outcomes.
- » Led the creation of NOAA's first-ever Organizational Values—Inclusion, Innovation, and Integrity—securing buy-in from 12,000 employees to integrate these values into agency culture and operations.
- » Developed NOAA's Equity Framework and Equitable Climate Services Action Plan, embedding equity across the agency's funding, programs, and operations.

Management and Program Analyst/Presidential Management Fellow | Department of Housing and Urban Development, Office of Block Grant Assistance

- » Advised entitlement communities on effective management and implementation of CDBG funds, ensuring compliance with federal regulations while maximizing funding impact for community development initiatives.
- » Led data analysis and impact assessments using PowerBI and Microsoft Access, generating insights that improved program evaluation and informed data-driven decision-making for senior leadership.
- » Evaluated and recommended applications for HUD's Pathways to Removing Obstacles to Housing program, supporting local governments reducing barriers to and expanding the supply of affordable housing.
- » Provided expert guidance on the Integrated Disbursement and Information System, a national database for administering and reporting on CDBG, ensuring proper fund management and regulatory compliance.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2025 to Present

Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2024 to 2025

National Oceanic and Atmospheric Administration (on detail), Special Assistant and Equity Advisor (Presidential Management Fellow, 2024

Leah Kessler

Program Manager



Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2023 to 2024

Harvard's Center for Public Leadership, Research Assistant, 2022 to 2023

Alaska Venture Fund, Consultant, 2022 to 2023

City of Anaheim, Mayoral Transition Term Fellow, January 2023

Office of Governor DeWine, Michael S. Dukakis Summer Fellow, June 2022 to August 2022

HeartShare St. Vincent's Services, Case Planner/2019 Children's Corps Fellow, 2019 to 2021

The Harman Firm, LLP, Law Clerk/Paralegal, 2017 to 2019

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.

Nathan Beam

Grants Management Specialist



- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.
- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Nathan Beam

Grants Management Specialist



Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.
- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Julia Zachgo

Grants Management Specialist



Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Resumes: Task 10

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » Bachelor of Arts, Indiana University College of Arts and Sciences, 2012

Training and Certifications

- » Professional Certificate in Municipal Finance, The University of Chicago Harris School of Public Policy, 2018
- » Chicago Public Library Foundation, Associate Board, Membership Committee, 2019 to Present

Relevant Highlights

- » Worked on the two largest financial crises in US history
- » Experience advising elected and senior appointed government officials
- » Fiscal management reform and restructuring expertise
- » Focuses on helping governments transform and rebuild their operations during critical crises
- » Experienced consulting professional with dedicated public service focus

Professional Biography

Mr. John H. Hageman is a Deputy Director at Hagerty Consulting, Inc. (Hagerty) with over a decade of experience in strategic management, public sector finance and administration, and restructuring and turnaround. At Hagerty, Mr. Hageman leads the firm's Federal Funds Management services, helping state and local governments identify, secure, manage, and implement federal funds with an emphasis on funding under the *American Rescue Plan Act (ARPA)*, *Infrastructure Investment and Jobs Act (IIJA)*, and *Inflation Reduction Act*. Mr. Hageman oversees a portfolio of engagements and Hagerty professionals who assist state and local governments in their administration of over \$14 billion in federal funds. Mr. Hageman specializes in helping governments recover from fiscal and economic distress and crises, having held critical, executive-level roles on the two largest municipal financial crises in United States (US) history.

Relevant Professional Experience

Project Executive | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Leads efforts within the County to administer Community Development Block Grant-Disaster Recover, including the development of the federally compliant Action Plan approved by the US Department of Housing and Urban Development.
- » Oversees overall design and implementation of the program for proper disbursement to community partners, including subrecipients and local stakeholders.

Project Executive | Manatee County, Florida, Department of Transportation Grant Writing | Hagerty Consulting, Inc.

- » Leads efforts within the County to locate, apply for, and manage Federal, State, nonprofit, foundation, corporate, and private grants for the benefit of citizens and visitors of Manatee County. Projects managed include support for the Transportation Ferry Grant, which serves resident passengers and visitors seeking to participate in economic investment and tourism activities.

John H. Hageman

Project Executive/Subject Matter Expert



Project Executive | State of Washington, Federal Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversees the state-wide Federal Funds Grant Writing Assistance Program for Washington to help local and tribal governments, businesses, nonprofits ports, and other resource-constrained communities apply for and access federal funds.

Project Executive | State of Wyoming, Grant Writing and Technical Assistance Program | Hagerty Consulting, Inc.

- » Oversee the state-wide Wyoming Grants Assistance Program (WYGAP), offering support to non-profit organizations, small businesses, local and tribal governments, and more in efforts to attain and manage federal funding.
- » Oversee efforts to produce grant opportunity scans, assessing potential programs for WYGAP users; technical assistance meetings and direct outreach; and, efforts to deliver comprehensive planning for integrating state and Federal funds into programmatic needs.
- » Oversee team responsible for planning and coordinating Wyoming Funding Summit, sponsored by the Governor and US Senators; lead team responsible for developing and delivering training sessions focused on the grants management lifecycle including pre-award and post-award grant management and compliance.

Program Manager | Maryland Department of Budget and Management, American Rescue Plan Act Administration and Management | Hagerty Consulting, Inc.

- » Leads Hagerty team that supports the State's \$3.7 billion Coronavirus State Fiscal Recovery Funds allocation. Responsible for US Department of the Treasury (Treasury) and Uniform Guidance compliance, ARPA policy advisory, federal and internal reporting, and technical assistance to the Department of Budget and Management and State agencies.

Project Advisor | New York City Office of Management and Budget, American Rescue Plan Act Support and Advisory Services | Hagerty Consulting, Inc.

- » Provided direction and guidance to Hagerty team that supports the New York City Office of Management and Budget in compliance with US Treasury program guidance and Uniform Guidance, organizational design/implementation, and federal reporting associated their \$5.9 billion State and Local Fiscal Relief Funds through ARPA/

Program Manager and Subject Matter Expert | Huntsville Utilities, Alabama, Federal Funds Strategy | Hagerty Consulting, Inc.

- » Provide oversight and subject matter expertise to Hagerty team that supports Huntsville Utilities in the assessment of unfunded priorities and the identification of federal funds. Advise on water, electric, and cyber programs within the IJA.

Employment History

Hagerty Consulting, Inc., Deputy Director, 2023 to Present

Hagerty Consulting, Inc., Senior Manager, 2021 to 2023

Hageman Consulting, Inc., Independent Consultant, 2019 to 2021

City of Detroit, Michigan Government, Chief of Staff, Office of the Chief Financial Officer, 2015 to 2019

John H. Hageman

Project Executive/Subject Matter Expert



Public Consulting Group, Business Analyst, 2013 to 2015

AmeriCorps VISTA, Hearts & Hands of Indiana, Volunteer Coordinator, 2012 to 2013

Obama For America, Deputy Field Organizer, 2012

Indiana University, School of Public Health, Research Assistant, 2012

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



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- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Program Manager



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Julia Zachgo

Grants Management Specialist



Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Education

- » Master of Business Administration, Florida Southern College
- » Bachelor of Arts, Organizational Management, University of Arizona Global Campus

Training and Certifications

- » Florida Real Estate License
- » HUD Exchange CDBG-DR/MIT Webinar Series, *Uniform Relocation Act*, Environmental Review Adoption, Historic Properties in Flood Zones, CDBG Grant Administrator, *Build America Buy America Act*, and Grant Based Accounting

Relevant Highlights

- » Successfully directed Home Buyout programs, facilitating the acquisition of over 40 homes.
- » Led successful application development resulting in over \$150 million in CDBG-DR awards.
- » Provided technical assistance and compliance guidance for CDBG-DR Action Plans and Mitigation Needs Assessments across multiple states.
- » Ensured HUD and federal funding compliance throughout project implementation, procurement, and financial oversight.

Professional Biography

Mr. Nathan Beam is a seasoned Disaster Recovery Consultant with expertise in Community Development Block Grant Disaster Recovery (CDBG-DR) program implementation, grant management, and compliance. With over seven years of experience in Federal Emergency Management Agency (FEMA) Public Assistance (PA) and CDBG-DR program delivery, he has successfully developed, designed, and managed over \$150 million in infrastructure, housing, and economic revitalization projects. His expertise spans action plan development, unmet and mitigation needs assessments, procurement compliance (2 Code of Federal Regulations [CFR] 200), financial oversight, and program implementation to ensure strategic allocation of federal recovery funds. He has extensive experience interpreting Department of Housing and Urban Development (HUD) and FEMA regulations, advising local governments, and optimizing funding strategies to maximize community impact.

Mr. Beam works closely with municipalities, state agencies, and other stakeholders to navigate the complexities of disaster recovery funding, ensuring effective program execution, regulatory compliance, and transparency. He has played a key role in developing long-term resilience strategies, drafting program policies, and providing technical assistance to subrecipients across infrastructure, economic, and housing programs. His ability to streamline compliance processes, conduct financial monitoring, and align funding with strategic recovery priorities makes him a trusted leader in disaster recovery efforts. He has also supported action plan development for clients, including the North Carolina Department of Commerce, the City of Asheville, the Pennsylvania Department of Community and Economic Development, St. Louis County, and Manatee County, ensuring funding is strategically aligned with local recovery needs and federal requirements.

Relevant Professional Experience

Buyout Programs | Manatee County, St. Louis County and Panama City, Florida, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Developed buyout program policies and guidelines for Manatee County, St. Louis County, and Panama City.
- » Support included Safe Housing Guidelines, Fair Housing and Non-Discrimination Policies, and comprehensive acquisition procedures, eligibility criteria, and compliance protocols to align with HUD and URA requirements.

Nathan Beam

Grants Management Specialist



- » Guided the implementation of two CDBG-DR Voluntary Home Buyout programs in Panama City, encompassing approximately 40 disaster-impacted residential properties, converting high-risk parcels to permanent open space to reduce future flood risk.
- » Managed public engagement and case management for all program participants, serving as the primary point of contact to provide guidance, policy interpretation, program updates, and stakeholder support.
- » Coordinated with legal counsel, appraisers, surveyors, title companies, and environmental review teams to ensure timely, compliant acquisitions.
- » Applied fair housing principles, monitored duplication of benefits, and guided integration of acquired parcels into the City's long-term flood mitigation and land-use strategies.
- » Obtained \$5 million in additional funding for the City's home buyout efforts related to Hurricane Sally, making Panama City the only non-HUD Most Impacted and Distressed recipient to receive this funding.

Action Plan Development and Technical Assistance Specialist | Pennsylvania, North Carolina, Asheville, St Louis County, and Manatee County, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Prepared and guided CDBG-DR Action Plan development, providing technical assistance, compliance guidance, and strategic recommendations to align funding priorities with HUD regulations and local recovery strategies.
- » Designed economic recovery initiatives, including small business support (loan and grant assistance), workforce development, and revitalization strategies for flood-damaged commercial districts.
- » Conducted public meetings and stakeholder engagement sessions, including direct coordination with emergency management directors to identify and prioritize recovery needs.
- » Developed Mitigation Needs Assessments to identify risk-reduction opportunities and integrate resilience-focused strategies into Action Plans.

Project Manager | City of Panama City, Florida Disaster Recovery, Community Development Block Grant-Disaster Recovery Support | Hagerty Consulting, Inc.

- » Lead advisor for \$120 million in CDBG-DR-funded projects, overseeing infrastructure, housing, and economic revitalization initiatives and ensuring compliance with federal, state, and local regulations.
- » Developed grant applications securing \$13 million for a novel economic revitalization program, funding façade improvements for over 50 small businesses. Designed program policies, budgets, and work plans.
- » Secured \$65 million for the rehabilitation of underground utilities, including water, stormwater, and sewer infrastructure. Provides technical oversight and guidance on procurement, contractor compliance, and financial reporting.
- » Conducted public outreach efforts for HUD-funded projects, coordinating more than 200 engagements with homeowners and businesses while ensuring compliance with CDBG-DR citizen participation requirements.

Senior Grants Management Specialist | Bay District Schools, Florida, Hurricane Michael Recovery | Hagerty Consulting, Inc.

- » Provided compliance oversight for construction contracts, FEMA 428 projects, and reimbursement processes, ensuring adherence to federal procurement regulations under 2 CFR 200.

Nathan Beam

Grants Management Specialist



- » Managed invoice reviews and reimbursement requests, ensuring financial accuracy, compliance with eligibility requirements, and timely payments for FEMA-funded projects.
- » Assisted in contractor procurement, project implementation, and compliance monitoring for multiple large-scale school reconstruction projects.
- » Identified and secured non-FEMA funding sources, including grants for behavioral health training and mental health services under Project SERV, providing critical resources to students in post-disaster recovery.

Program Delivery Manager | FEMA

- » Managed the delivery of FEMA PA programs, ensuring adherence to federal guidelines and regulations while guiding local governments through grant application processes.
- » Conducted progress monitoring and evaluations, identifying process improvements and ensuring compliance with federal procurement, environmental, and financial requirements.
- » Facilitated training and workshops to enhance stakeholder understanding of FEMA grant requirements, cost eligibility, and project implementation best practices.
- » Assisted local agencies in grant applications for infrastructure projects, serving as a liaison between applicants, FEMA, and state agencies throughout the funding process.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2020 to Present

Federal Emergency Management Agency, Program Delivery Manager, 2018 to 2019

United States Air Force, Explosive Ordnance Disposal Team Leader, 2003 to 2017

Resumes: Task 12

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Science, Real Estate, Johns Hopkins University, 1997
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Relevant Highlights

- » Member, Bipartisan Policy Center Disaster Recovery Reform Task Force (2020 – Present)
- » Extensive experience with HUD including 17 years managing disaster recovery and community development programs
- » 11 years as career member of US Government Senior Executive Service
- » Recipient of the Presidential Rank Award (Meritorious Level)
- » Project responsibilities have included managing teams of more than 140 staff and more than \$90 billion of supplemental appropriations after disasters

Professional Biography

For 32 years, Stan Gimont was with the United States (US) Department of Housing and Urban Development (HUD) and focused his career on the Community Development Block Grant (CDBG) Program. Beginning his career as a Presidential Management Intern, Mr. Gimont ultimately served as Director of HUD's Office of Block Grant Assistance and actively managed all components of the CDBG program including the CDBG – Disaster Recovery (CDBG-DR), Entitlement Communities, and State CDBG programs. He also managed implementation of the \$7 billion Neighborhood Stabilization Program in response to the 2008-2009 housing crisis.

Regarding CDBG-DR, he guided policy development for \$90 billion CDBG-DR program and, as a result, has unique insight into HUD's administrative oversight of the program. As Deputy Assistant Secretary at HUD from 2016-2019, he managed approximately 140 staff members and was responsible not only for the CDBG program but also the HOME Investment Partnership Program (HOME) affordable housing production program and HUD's departmental environmental compliance responsibilities.

Since joining Hagerty Consulting, Inc. in late 2019, Mr. Gimont has been providing subject matter expertise and advisory support to clients seeking assistance in administering CDBG-DR and Mitigation (CDBG-MIT) funding.

Relevant Professional Experience

Senior Advisor | Manatee County, FL, 2024 Hurricanes Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Pursuant to existing contract grants management contract with Manatee County, assisted County with policy guidance and drafting expertise on all aspects of Action Plan for \$252 million CDBG-DR allocation.

Senior Advisor | North Carolina Department of Commerce, Hurricane Helene Community Development Block Grant Team | Hagerty Consulting, Inc.

- » Assisted Task Force with policy guidance and drafting expertise on all aspects of Action Plan for \$1.4 billion CDBG-DR allocation.

Stan Gimont

Project Executive / Subject Matter Expert



Lead Author | CDBG-DR/MIT “Bootcamp” Manual, Council of State Community Development Agencies | Hagerty Consulting, Inc.

- » Drafted and edited 300+ page manual for the Council of State Community Development Agencies to use in training state staff on CDBG-DR/MIT programs. Updated manual in 2024 and 2025.
- » Manual addresses CDBG-DR/MIT historical context, interaction with the Federal Emergency Management Agency (FEMA), eligible activities, national objectives, cross-cutting issues, action plan development, development of policies and procedures, and best practices.
- » Prepared “digital archive” of key documents and website to support program administration at state level.

Subject Matter Expert | Puerto Rico Department of Housing, Community Development Block Grant - Mitigation Program | Hagerty Consulting, Inc.

- » Provided interpretive guidance on HUD requirements and expectations related to use of \$8.2 billion of CDBG-MIT funding in support of broad scope of infrastructure and economic development programs.

Senior Subject Matter Expert | Nebraska Department of Economic Development, Community Development Block Grant – Disaster Recovery Action Plan and Implementation | Hagerty Consulting, Inc

- » Supported development of CDBG-DR Action Plan addressing damage due to 2019 flooding.

Deputy Assistant Secretary for Grant Programs | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as FEMA, the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnerships program, and HUD’s environmental compliance efforts, with a combined annual budget of more than \$5 billion.

Director | Office of Block Grant Assistance | United States Department of Housing and Urban Development

- » Managed all components of HUD’s CDBG program including Entitlement Communities and State programs, the Section 108 loan guarantee program, CDBG-DR grants, and the Neighborhood Stabilization Program.

Employment History

Hagerty Consulting, Inc., Senior Advisor for Community Recovery, 2019 to Present

United States Department of Housing and Urban Development (US HUD), Deputy Assistant Secretary for Grant Programs, 2016 to 2019

US HUD, Director, Office of Block Grant Assistance, 2008 to 2016 (Deputy Director 2006-2008)

US HUD, Director, Entitlement CDBG Program, 2004 to 2006

US HUD, Assistant Director, Section 108 Loan Guarantee Program, 2002 to 2004

Stan Gimont

Project Executive / Subject Matter Expert



US HUD, Multifamily Housing Specialist, 2001 to 2002

US HUD, Senior Financial Analyst, 1993 to 2001

US HUD, CPD Specialist, 1989 to 1993

US HUD, Presidential Management Intern, 1987 to 1989

Education

- » Master of Public Administration, New York University
- » Bachelor of Science, Rutgers College

Relevant Highlights

- » Experienced disaster mitigation, preparedness, and recovery planner
- » More than 20 years managing complex domestic and international response and recovery projects
- » Founded and managed a global disaster relief non-profit organization

Training and Certifications

- » Master Exercise Practitioner (MEP)
- » Professional Development Series
- » Homeland Security Exercise and Evaluation Program (HSEEP) certified
- » Incident Command System (ICS) Train-the-Trainer certified

Professional Biography

Ms. Amelia Muccio is the Director of Mitigation with Hagerty Consulting, Inc. (Hagerty), and has more than 20 years of experience strategizing, leading national and international mitigation, preparedness, response, and recovery projects. Ms. Muccio has worked on all-hazards planning and policy development, grants management and evaluation, capacity building, *Robert T. Stafford Disaster Relief and Emergency Assistance Act* (Stafford Act) Sections 404/406 mitigation, Building Resilient Infrastructure and Communities (BRIC), continuity of operations, training, and exercises.

Ms. Muccio has extensive demonstrated experience as a robust project leader and subject matter expert in support of mitigation and cost recovery work related to a series of grants and funding sources. She directly supported the resiliency of 16 city agencies for New York City (NYC) during immediate Hurricane Sandy recovery needs. Between August 2013 and May 2018, Ms. Muccio spearheaded the submission of a \$1.1 billion Hazard Mitigation Grant Program (HMGP) Section 404 portfolio on behalf of the city as part of larger risk management and preparedness efforts. For Section 406 and 404, Ms. Muccio oversees the mitigation recovery effort for New York City agencies and the Office of Management and Budget (OMB) with a continuously expanding portfolio valued at \$2.2 billion.

For the last six years, Ms. Muccio has led a team of over 20 team members and subcontractors in support of the California Governor's Office of Emergency Services (Cal OES) Hazard Mitigation Assistance (HMA) Branch. In addition to project management support, Ms. Muccio is the technical lead for all the HMA programs, but most specifically, the BRIC program, which has received the most funding (by a State) to date. Most recently, she led the submission of the BRIC Fiscal Year 2023 – Capability and Capacity Building (C&CB) allocation, building codes plus-up, and competitive projects for over \$500 million (federal share). Over 70 percent of the projects included nature-based solutions, and over 80 percent benefit socially vulnerable communities per federal requirements.

Relevant Professional Experience

Hazard Mitigation Assessment Advisor | California Governor's Office of Emergency Services, Surge Capacity Staffing | Hagerty Consulting, Inc.

- » Provides project management support as the team lead to the Cal OES Hazard Mitigation Branch and the Hagerty Mitigation Team.
- » Provides cradle to grave subject matter expertise and project management support for 12 presidentially declared disasters with HMGP funding opportunities.
- » Assisted Cal OES on their BRIC 2020 through 2023 submission; California was awarded the highest competitive funding amount for these fiscal years.
- » Provided project management on the review and adjudication of approximately 2,400 Notices of Interest (NOIs) and the technical review for programmatic, feasibility, and Environmental and Historic Preservation (EHP) components of approximately 735 submitted subapplications totaling \$6.3 billion in project costs, and the management of \$3.5 billion in grants.
- » Provided implementation expertise to the Cal OES Flood Mitigation Assistance, HMGP post-fire, and Congressionally Directed Pre-Disaster Mitigation programs.
- » Developed and delivered over 180 capacity building webinars for Cal OES staff and eligible subapplicants on the HMA Program.

Mitigation Subject Matter Expert | Montgomery County, Texas Pre- and Post-Disaster Support | Hagerty Consulting, Inc.

- » Provided support for Hagerty teams currently supporting pre-and post-disaster support related to the Novel Coronavirus (COVID-19) emergency and concurrent disaster events.
- » Oversaw and developed debris monitoring operations, HMGP applications, Community Development Block Grant – Disaster Recovery (CDBG-DR) and -Mitigation (CDBG-MIT) applications, and COVID-19 response management.

Senior Project Manager | Nebraska Emergency Management Agency Mitigation Services Contract | Hagerty Consulting, Inc.

- » Assisted with the immediate implementation and administration of the HMGP for DR-4420 and the Federal Emergency Management Agency (FEMA) HMA Programs generally. Directed technical assistance on application review, technical reviews of benefit-cost analysis (BCA), EHP compliance, and procedural improvements for the implementation of the State mitigation program.

Subject Matter Expert | City of Panama City, Florida Disaster Recovery | Hagerty Consulting, Inc.

- » Reviewed project with City leadership and engaged the citizenry to develop a Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.
- » Developed engagement events with the public through the early summer of 2019 to identify how people want to build back the city, taking advantage of the FEMA 428 Alternative Procedures to remove severely damaged buildings that were not being fully utilized to create more green spaces and community areas.

Amelia Muccio

Project Executive/Subject Matter Expert



Project Manager/Team Lead | New York City Office of Management and Budget Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- » Managed 10-person team and coordinated with NYC agencies on technical assistance issues, including Project Worksheet (PW) development and hazard mitigation.
- » Developed proposals, cost effectiveness determinations, Request for Information (RFI) responses, campus-based mitigation solutions, 428 Alternative Procedures, and programmatic eligibility.
- » Submitted a \$1.1 billion HMGP portfolio. Oversaw Section 406 expanding portfolio valued at \$2.2 billion.

Project Manager | New York City Office of Management and Budget Hurricane Sandy Recovery, Section 404 Hazard Mitigation Grant Program | Hagerty Consulting, Inc.

- » Managed 17-person team during the Letter of Intent and initial application phase; coordinated with city agencies for technical assistance issues including scope of work changes, BCA, RFI responses, EHP, advance assistance application requests, and technical feasibility.
- » Developed 43 HMGP applications for NYC agencies. Provided ongoing technical assistance to NYC for HMGP applications.

Director, Haiti Project and Disaster Operations | Humane Society International

- » Provided emergency management, international development, and public health expertise to ongoing recovery projects in Japan and Haiti; provided direct, field oversight in Haiti to staff of 12.
- » Coordinated field disaster response and zoonotic disease surveillance for Haitian veterinarians including 2012's Tropical Storm Isaac and Hurricane Sandy.
- » Advised Haitian Ministries on emergency management; developed first all hazards disaster preparedness training for high-ranking government officials.

Cities Readiness Initiative Exercise and Training Consultant | City of Portland Department of Health and Human Services

- » Coordinated Portland's Cities Readiness Initiative (CRI) training and exercise program designed to maximize response capabilities during large scale public health emergencies. Planned, conducted, and evaluated CRI training and exercises focused on mass prophylaxis and point of distribution effectiveness.

Employment History

Hagerty Consulting, Inc., Director of Mitigation, 2017 to Present

Hagerty Consulting, Inc., Senior Managing Associate, Recovery, 2013 to 2017

The Humane Society of the United States, Director, Haiti Project and Disaster Operations, 2011 to 2013

New Jersey Primary Care Association, Director of Emergency Management/Bioterrorism Educator, 2004 to 2011

The Humanitarian Project, Founder/Executive Director, 2004 to 2010

Education

- » Master of Public Policy, Harvard Kennedy School, 2023
- » BA, Public Policy, University of Chicago, 2017

Relevant Highlights

- » Federal grant management and administration, including experience with the DRGR
- » CDBG-DR and CDBG-MIT administration
- » Experience with DRGR

Professional Biography

Ms. Leah Kessler is a disaster recovery and community development professional with specialized experience in climate resiliency. As a Presidential Management Fellow, she supported multiple offices within the United States Department of Housing and Urban Development (HUD) where she supported disaster recovery, guided recipients of the Community Development Block Grant-Disaster Recovery (CDBG-DR), served as a subject matter expert for the Disaster Recovery Grant Reporting (DRGR) System, and provided technical assistance for CDBG applicants and recipients. In addition, she has supported the National Oceanic and Atmospheric Administration (NOAA) with spearheading an equitable grantmaking initiative to increase access to climate resilience and adaptation grants, improving agency grantmaking efficiency, and integrating equity into NOAA-wide policies.

Relevant Professional Experience

Recovery Consultant | Montgomery County, Texas, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided technical support for Montgomery County's approximate \$70 million CDBG-Mitigation (-MIT) grant program.
- » infrastructure initiative, contributing to the planning, design, and implementation of mitigation and resilience projects.
- » Authored comprehensive policies and procedures for Section 3, *Davis-Bacon Act*, *Uniform Relocation Assistance and Real Property Acquisition Policies Act* (URA), and Environmental Review Requirements, ensuring federal compliance and streamlining program operations.
- » Provided strategic guidance on Section 3 and URA implementation, advising County leadership on best practices to minimize displacement and optimize community benefits.

Management and Program Analyst | United States of Department of Housing and Urban Development, Office of Disaster Recovery

- » Advised department leadership on housing policy and community development strategies, shaping affordable housing solutions that expanded access for low- and moderate-income residents.

Leah Kessler

Program Manager



- » Oversaw and optimized federally funded disaster recovery and resilience grants through CDBG-DR, improving fund allocation and compliance while strengthening state and local governments' ability to implement risk mitigation and long-term recovery strategies.
- » Led regulatory and policy analysis, communicating complex federal programmatic guidelines, and advising New York State grant recipients on CDBG-DR implementation to maximize community impact.
- » Provided hands-on technical assistance to grantees, guiding them through federal regulations, conducting desk reviews and audits, and recommending corrective actions as needed.
- » Served as a subject matter expert on the DRGR System, a national database for managing and tracking CDBG-DR grants, ensuring compliance and effective grant oversight.

Special Assistant and Equity Advisor | National Oceanic and Atmospheric Administration (on detail for Department of Housing and Urban Development)

- » Spearheaded NOAA's equitable climate funding initiative, increasing access to climate resilience and adaptation grants for frontline communities. Developed a 100-page guide, user-friendly grant portal, and bias awareness training, ensuring federal funding supported equitable environmental outcomes.
- » Led the creation of NOAA's first-ever Organizational Values—Inclusion, Innovation, and Integrity—securing buy-in from 12,000 employees to integrate these values into agency culture and operations.
- » Developed NOAA's Equity Framework and Equitable Climate Services Action Plan, embedding equity across the agency's funding, programs, and operations.

Management and Program Analyst/Presidential Management Fellow | Department of Housing and Urban Development, Office of Block Grant Assistance

- » Advised entitlement communities on effective management and implementation of CDBG funds, ensuring compliance with federal regulations while maximizing funding impact for community development initiatives.
- » Led data analysis and impact assessments using PowerBI and Microsoft Access, generating insights that improved program evaluation and informed data-driven decision-making for senior leadership.
- » Evaluated and recommended applications for HUD's Pathways to Removing Obstacles to Housing program, supporting local governments reducing barriers to and expanding the supply of affordable housing.
- » Provided expert guidance on the Integrated Disbursement and Information System, a national database for administering and reporting on CDBG, ensuring proper fund management and regulatory compliance.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2025 to Present

Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2024 to 2025

National Oceanic and Atmospheric Administration (on detail), Special Assistant and Equity Advisor (Presidential Management Fellow, 2024

Leah Kessler

Program Manager



Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2023 to 2024

Harvard's Center for Public Leadership, Research Assistant, 2022 to 2023

Alaska Venture Fund, Consultant, 2022 to 2023

City of Anaheim, Mayoral Transition Term Fellow, January 2023

Office of Governor DeWine, Michael S. Dukakis Summer Fellow, June 2022 to August 2022

HeartShare St. Vincent's Services, Case Planner/2019 Children's Corps Fellow, 2019 to 2021

The Harman Firm, LLP, Law Clerk/Paralegal, 2017 to 2019

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



-
- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Bachelor of Arts, Schreiner University

Training and Certifications

- » Project Management Certificate, Texas Tech University
- » Certified Grant Administrator, TxCDBG

Relevant Highlights

- » Secured and managed over \$30 million in program funding, ensuring compliance with financial regulations.
- » Developed program performance dashboards, enhancing transparency and decision-making.
- » Optimized program execution frameworks, improving efficiency by 25% through process improvements.

Professional Biography

Mr. Parker Harrison has over 20 years of program management experience with an emphasis on the Community Development Block Grant (CDBG), CDBG-Disaster Recovery (DR), HOME Investment Partnerships Program (HOME), and other federal funding streams. Proven leader in multi-million-dollar grant oversight, cross-sector collaboration, and compliance with federal statutory requirements. Adept in aligning programs with the United States Department of Housing and Urban Development (HUD) mandates, 2 Code for Federal Regulations (CFR) 200, *Davis-Bacon Act*, and other critical compliance areas. Known for building strong client relationships, facilitating strategic delivery, and driving community resilience through recovery and redevelopment.

Relevant Professional Experience

Application Specialist | GrantWorks

- » Wrote complex cross-functional project grants, ensuring seamless coordination between business units and external agencies.
- » Oversaw multi-million-dollar initiatives' program documentation, stakeholder reporting, and compliance monitoring.
- » Led financial analysis efforts, ensuring accurate forecasting, risk management, and process optimization.

Community Development Manager | City of Marshall, Texas

- » Developed the City's five-year Consolidated Plan, establishing a strategic framework to maximize HUD funding impact and align with the city's long-term development goals.
- » Automated community development processes, enhancing service efficiency and project outcomes.
- » Managed daily operations across multiple departments, including Code Enforcement, Building and Health Inspections, and Planning and Zoning, to ensure seamless and efficient service delivery.
- » Ensured compliance with CDBG-funded activities, adhering to all federal and state regulations to maintain funding eligibility and program integrity.

Community Development Manager | City of Tyler, Texas

- » Developed comprehensive Policies and Procedures for managing CDBG and HOME grant programs, ensuring compliance with federal, state, and local regulations.

- » Prepared detailed accomplishment reports on a weekly, monthly, and annual basis for City executive management, City Council, and HUD, fostering transparency and accountability.
- » Proposed and implemented strategies to optimize staff efficiency and resource utilization, streamlining the administration of community development plans and projects.
- » Collaborated with citizens, program participants, and contractors to address program-related issues and successfully mediate and resolve complaints.
- » Monitored and applied local, state, and federal legislation and guidelines to ensure alignment with community development and housing activities.

Community Development Administrator | City of Longview, Texas

- » Directed the planning, implementation, and administration of community development and affordable housing programs, aligning activities with federal and HUD regulations.
- » Prepared, updated, and submitted key documents, including the City's Annual Consolidated Action Plan and Consolidated Annual Performance and Evaluation Report, ensuring timely and accurate reporting.
- » Updated administrative plan documents to maintain compliance with HUD and Federal housing standards.
- » Conducted comprehensive research and analysis on housing trends, population growth, transportation, and economic issues to provide actionable recommendations for short- and long-term development plans.
- » Administered and monitored budgets for CDBG, HOME, and Shelter Plus Care grant programs, ensuring optimal allocation and expenditure of funds.
- » Oversaw Home Ownership, Lead-Based Paint, Fair Housing, and other community development programs, tracking performance and compliance.
- » Evaluated sub-recipient and contractor expenditures for accuracy and compliance, processed financial submissions to HUD, and managed drawdowns of grant funds.
- » Collaborated with HUD personnel on program activities, compliance monitoring, and financial audits, addressing and resolving any issues effectively.
- » Delivered detailed program reports to City executive management, City Council, and HUD, maintaining transparency and fostering trust among stakeholders.

Economic Development Management | East Texas Council of Governments

- » Developed and executed regional strategic programs, enhancing economic growth and operational efficiency.
- » Provided financial oversight, optimizing budgets and monitoring program expenditures to align with compliance standards.
- » Established key performance metrics and dashboard reporting systems to track program progress.

Grants Consultant | 2H Realty and Consulting Group

- » Led the development and management of large-scale programs across multiple sectors, aligning initiatives with strategic objectives.
- » Designed and implemented program governance frameworks, ensuring efficiency, accountability, and regulatory compliance.

Parker Harrison

Grants Management Specialist



-
- » Managed financial planning and secured over \$30 million in funding, ensuring program sustainability and impact.
 - » Collaborated with internal and external stakeholders to drive program milestones and resolve operational challenges.

Employment History

2H Realty and Consulting Group, Grants Consultant, 2020 to Present

East Texas Council of Governments, Economic Development Manager, February 2024 to May 2024

GrantWorks, Application Specialist, 2020 to 2023

City of Tyler, Community Development Manager, 2018 to 2019

City of Longview, Community Development Administrator, 2011 to 2018

2H Realty Group, Real Estate Broker, 2005 to 2017

Hill County Home Opportunity Council, Executive Director, 2008 to 2011

Hill County Home Opportunity Council, Program Director, 2005 to 2007

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Julia Zachgo

Grants Management Specialist



Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Resumes: Task 14

Education

- » Master of Public Policy, George Mason University
- » Bachelor of Arts, Government and International Politics, George Mason University

Training / Certifications

- » (Inactive) Top-Secret (TS)/Sensitive Compartmented Information (SCI) Security Clearance

Relevant Highlights

- » Crisis Communications Strategy
- » Public Affairs
- » External Communications
- » Media Relations
- » Government Relations
- » Community Engagement
- » Private Sector/ Industry Liaison

Professional Biography

Mrs. Jessi Widhalm is Hagerty Consulting, Inc.'s (Hagerty's) Communications Director, responsible for driving the company's external communications strategy and brand through effective media engagement, digital communication, as well as public relations, corporate partnerships, government relations, and advocacy campaigns.

Prior to joining Hagerty, Mrs. Widhalm spent nearly a decade in federal service, most recently serving as Director of External Affairs for the Federal Emergency Management Agency (FEMA). In this role, she managed the daily operations of the Agency's public affairs, strategic communications, congressional and intergovernmental affairs, as well as the Ready.gov campaign. During her tenure at FEMA, Mrs. Widhalm also served as the Director of Congressional Affairs where she was the agency's principal liaison with the United States (US) Congress and ensured that the agency's priorities were reflected throughout the legislative and oversight process.

A proven crisis communications expert, Mrs. Widhalm effectively coordinated and led the FEMA's external communications and engagements for over 234 Presidentially declared disasters, including the COVID-19 Pandemic as well as some of the Nation's most devastating hurricanes and wildfires.

Relevant Professional Experience

Communications Director | Hagerty Consulting, Inc.

- » Develops and oversees the firm's Marketing, Communications, and External Affairs (MCEA) team projects including organic and paid social media campaigns, content creation, website redesign and enhancement strategies, government relations, and other external branding and marketing activities.
- » Leverages the media to expand Hagerty's brand with more than 400 earned media mentions and an estimated earned media value of \$16 million – representing a 150 percent increase in the first two years.
- » Positions Hagerty as an industry leader through strategic engagement with trade associations, industry, and community leaders – bringing the firm more than 20 new businesses opportunities and increasing our organic marketing-to-client conversion rate by nearly 30 percent.

Jessi Widhalm

Project Executive/Subject Matter Expert



- » Supports Hagerty clients with targeted crisis communications and media relations including Lee County, Florida; City of Austin, Texas; and City of San Antonio, Texas.

Director | Office of External Affairs, Federal Emergency Management Agency

- » Lead crisis communications strategist and senior spokesperson for FEMA with extensive on and off-record experience.
- » Was responsible for protecting the Agency's external brand and managing exigent public affairs matters to include: the federal government's response to historic disasters; personnel matters with potential to erode the public's trust and confidence; and significant leadership changes drawing increased public scrutiny and congressional oversight.
- » Accountable for re-branding Ready.gov as the federal government's strategic multimedia campaign to increase emergency preparedness.
- » Served as a liaison for private sector partners seeking to familiarize themselves with FEMA's lines of business.
- » Oversaw the Agency's external communications accessibility and *American Disabilities Act* Section 508 compliance.

Director of Congressional Affairs | Office of External Affairs, Federal Emergency Management Agency

- » Served as the Agency's principal liaison with the US Congress.
- » Worked closely with Congressional Members and staff on the *Disaster Recovery Reform Act*.
- » Managed numerous Congressional Leadership, Member, and committee oversight visits to disaster-impacted areas.

Chief of Staff | US House of Representatives, Rep. Michael T. McCaul (TX)

- » Strategically communicated the Congressman's position on key issues to other Members, House Leadership, media, industry stakeholders, constituents, and staff.
- » Executed personnel and budgetary decision-making for the Congressman's official and political operations.
- » Oversaw political activities and campaign finances including Political Action Committee, district, and national fundraising.

Deputy Chief of Staff | US House of Representatives, Rep. Michael T. McCaul (TX)

- » Managed legislative initiatives related to cybersecurity, technology, education, trade and transportation.
- » Worked and met frequently with key stakeholders on legislative priorities to gain industry support.

Director of Scheduling | US House of Representatives, Rep. Michael T. McCaul (TX)

- » Maintained the Congressman's schedule, travel plans, and related records in an efficient, sensitive manner.
- » Managed itinerary for multiple fundraising trips to New York City, Miami, Silicon Valley and Orange County.

Employment History

Hagerty Consulting, Inc., Communications Director, 2020 to Present

FEMA, Director, Office of External Affairs, 2018 to Present

FEMA, Director of Congressional Affairs, Office of External Affairs, 2017 to 2018

Committee on Homeland Security, Majority, Shared Professional Staff Member, 2015 to 2017

US House of Representatives, Rep. Michael T. McCaul, Chief of Staff, 2016 to 2017

Jessi Widhalm

Project Executive/Subject Matter Expert



US House of Representatives, Rep. Michael T. McCaul, Deputy Chief of Staff, 2014 to 2016

US House of Representatives, Rep. Michael T. McCaul, Director of Scheduling, 2012 to 2014

Education

- » Executive Leadership Program, US Naval Postgraduate School/Center for Homeland Defense and Security
- » Master of Public Administration/Government Public Management, Appalachian State University
- » Bachelor of Science, Criminal Justice, Appalachian State University

Relevant Highlights

- » Former Administrator of FEMA, coordinated federal government response to over 144 Presidential Major Disaster Declarations and 112 wildfires
- » Led revision to the National Response Framework to include a new Emergency Support Function (ESF-14) for Cross Sector Infrastructure Coordination
- » Launched the Community Lifelines Doctrine for FEMA
- » Developed/implemented FEMA Integration Teams to embed staff alongside state and tribal partners
- » Neil Frank Award, National Hurricane Conference, 2021
- » Distinguished Alumni Award, Appalachian State University, 2019
- » Good Samaritan Award, Samaritan's Purse, 2019

Professional Biography

Mr. William "Brock" Long is the former Administrator of the Federal Emergency Management Agency (FEMA) and a 23-year veteran of emergency management and homeland security, with progressive experience assisting and supporting local, state, and federal governments to build robust emergency management and public health preparedness programs nationwide. He specializes in evacuation, public safety, recovery management, and response logistics. He has supported the development of pre-disaster planning and post-disaster long-term recovery efforts to help cities, counties, states, and the United States (US) increase resilience against future disasters and enhance response capabilities.

As the FEMA Administrator, Mr. Long served as the nation's principal advisor to the President, responsible for coordinating the entire array of federal government resources down through 50 states, 573 tribal governments, and 16 island territories to assist with executing disaster preparedness, mitigation, response, and recovery. Mr. Long is also the former Director of the Alabama Emergency Management Agency where he acted as the State Coordinating Officer (SCO) for 14 disasters, including eight Presidential Major Disaster Declarations, six state declared events, and two events of national significance. Concurrently, he served on the FEMA National Advisory Committee (NAC) advising the sub-committee for response and recovery. During the nationally significant Deepwater Horizon Oil Spill Incident, Mr. Long served as the on-scene Incident Commander for the Alabama Unified Command.

Mr. Long has been called upon twice to testify before the US Congress regarding response to, and recovery from, catastrophic events. His opinion has been sought by numerous media outlets including CNN, the Associated Press, and the Weather Channel. He also has authored or contributed to several publications.

Mr. Long provides strategic direction and leadership to Hagerty Consulting, Inc.'s (Hagerty) full complement of emergency management programs and professionals, offering subject matter expertise for select projects and contributing as a thought leader to the growing body of knowledge in the emergency management community. He has been instrumental in supporting Hagerty's response and recovery missions, providing executive advisory support to numerous state and local emergency management directors and providing policy guidance on strategic issues.

Relevant Professional Experience

Administrator | Federal Emergency Management Agency

- » Led 21,000 diverse and dedicated public servants and executed a multi-billion-dollar operating budget (\$15.9 billion annual appropriation/more than \$44 billion Disaster Relief Fund).
- » Coordinated the federal government's response to over 144 Presidential Major Disaster Declarations and 112 wildfires, including three of the nation's most devastating hurricanes and five of the worst wildfires ever experienced.
- » Directed the US Fire Administration, the Center for Domestic Preparedness, Emergency Management Institute, and National Domestic Preparedness Consortium, responsible for establishing and improving competencies of officials within public safety at all levels of government charged with protecting against, responding to, and recovering from emergencies.
- » Rapidly transformed the agency's business enterprise by implementing the innovative Community Lifeline and FEMA Integration Team (FIT) concepts to strengthen private/public partnerships and permanently embed full-time FEMA professionals within state and tribal governments to better meet constituent needs.
- » Influenced federal legislation through 12 Congressional testimonies, resulting in the passage of the Disaster Recovery Reform Act (DRRA) that made Pre-Disaster Mitigation a national priority, provided meaningful changes to the FEMA workforce, and bolstered state and local emergency management capability.
- » Executed the National Flood Insurance Program (\$1.3 trillion exposure/five million policy holders) and implemented cutting-edge reinsurance capital market concepts that saved taxpayers approximately \$1 billion during Hurricane Harvey.
- » Ensured continuity for the entire Executive Branch of government on behalf of the White House. Preserved the nation's ability to make sure government mission essential functions continued regardless of any threat or emergency.

Executive Level Advisor | Florida Division of Emergency Management COVID-19 Response Support | Hagerty Consulting, Inc.

- » Provided support for the Florida Division of Emergency Management (FDEM) in response to COVID-19.
- » Guided the development of community-based test site procedures; supported strategic implementation of mass care and feeding efforts throughout the State of Florida; and assisted with the creation of a non-congregate shelter program to support co-response operations during the 2020 hurricane season.

Project Advisor | Texas General Land Office Alternative Housing Study Phase I and Phase II | Hagerty Consulting, Inc.

- » Supported the Texas General Land Office in performing studies relating to alternative housing for disaster recovery efforts, including addressing the challenges of co-disasters like the COVID-19, flooding, and hurricanes.
- » Provided expertise in the implementation of temporary housing programs under the FEMA Individual Assistance (IA) Program and points of integration with the Community Development Block Grant – Disaster Recovery (CDBG-DR) Program.

Brock Long

Project Executive/Subject Matter Expert



Director | Alabama Emergency Management Agency and Deputy Director of the Alabama Department of Homeland Security

- » Appointed as the Governor's Authorized Representative and State Coordinating Officer for eight Presidential Major Disaster Declarations, and six state declared disaster events, including executing the state's response to the H1N1 pandemic flu threat.

Employment History

Hagerty Consulting, Inc., Executive Chairman, 2019 to Present

Federal Emergency Management Agency, Administrator, 2017 to 2019

Hagerty Consulting, Inc., Executive Vice President, 2011 to 2017

Alabama Emergency Management Agency, Director, 2008 to 2011

Beck Disaster Recovery, Inc., Southeast Regional Director, 2007 to 2008

Federal Emergency Management Agency, Hurricane Program Manager, 2001 to 2006

Georgia Emergency Management Agency, Statewide Planner/School Safety Coordinator, 1999 to 2001

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



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- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Business Administration Coursework, Tallahassee Community College

Training, Certifications, and Achievements

- » Advanced Professional Series and Professional Development Series, Federal Emergency Management Administration Emergency Management Institute
- » SBP Leader Practitioner Course
- » Florida Certified Contract Manager

Relevant Highlights

- » HUD CDBG-DR experience in support of recovery management in the State of Florida
- » Program implementation as it relates to disaster recovery federal funding

Professional Biography

Ms. Ashley Napier is an affordable housing professional with expertise in programming under the United States Department of Housing and Urban Development (HUD) initiatives, including Community Development Block Grant – Disaster Recovery (CDBG-DR) programs and Low-Income Housing Tax Credit (LIHTC) projects. She has significant experience in supporting disaster recovery operations post-hurricane for the State of Florida, focusing on facilitating housing stability and recovery through buyout programs and down payment assistance initiatives.

Ms. Napier played a pivotal role in the implementation and technical assistance of multiple CDBG-DR programs during concurrent emergency events, such as Hurricanes Irma, Michael, and Ian, ensuring compliance with HUD guidelines while addressing the housing needs of affected communities. Her work has included the development of strategies to enhance access to affordable housing opportunities for low-income families and individuals.

Relevant Professional Experience

Housing Administration Lead | Disaster Recovery Services – State of Nebraska | Hagerty Consulting, Inc.

- » Led the implementation of Affordable Housing initiatives for Nebraska, managing projects such as LIHTC, Small Rental Development, and Homeownership Production Programs.
- » Developed comprehensive program and project design documents for the state, focusing on affordable housing activities, including LIHTC, down payment assistance, and small rental programs.
- » Provided support for various Task Orders from the Nebraska Department of Economic Development (DED), including program design based on CDBG grant allocations, facilitating technical assistance and capacity-building training, and delivering strategic solutions to improve program implementation.
- » Conducted verification of Duplication of Benefits for CDBG-DR and CDBG-Coronavirus programs, ensuring compliance while effectively supporting housing initiatives for Nebraska DED.

Community Development Block Grant-Disaster Recovery Lead | Village of Estero, Florida, Hurricane Ian Disaster and Grant Management Services | Hagerty Consulting, Inc.

- » Provides implementation support and technical assistance for the Village of Estero's CDBG-DR Program.
- » Supported the development of five grant applications totaling \$60 million for the Village to pursue CDBG-DR funding through Lee County's Public Facilities and Critical Infrastructure Notice of Funding Availability (NOFA).
- » Developed two grant applications and secured \$950,000 for the Village to in CDBG-DR funding through Lee County's Recovery & Resiliency Planning Program NOFA.

Community Development Block Grant-Disaster Recovery Lead | City of Panama City Beach, Florida, Disaster Recovery Administrative Services | Hagerty Consulting, Inc.

- » Provides support for funded CDBG-DR subrecipient activities for the City specific to Hurricane Michael.
- » Supports implementation and compliance for the City's CDBG-DR Infrastructure and Hometown Revitalization projects by interpreting and implementing regulations or policy guidance and providing advice and guidance pertaining to the interpretation of policies, rules, and regulatory provisions.
- » Monitors and evaluates the City's procured vendors for state and federal compliance by planning, scheduling, conducting on-site interviews, analyzing information, coordinating group activities, and recommending subsequent actions.
- » Ensures federal compliance by supporting the City's financial management, procurement, and construction processes, including, but not limited to, Davis Bacon and Labor Standards (DBLS), Section 3, 2 Code of Federal Regulations (CFR) 200.317-200.327, and 2 CFR 200.300-200.346.

Community Development Block Grant-Disaster Recovery Support Lead | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Community Development Block Grant-Disaster Recovery Support Lead | St. Louis County, Missouri Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as CDBG-DR Support Lead for the County's CDBG-DR Grant Management totaling \$56 million in funding.
- » Assists the County in the build out of their Action Plan including an Unmet Needs Assessment.
- » Provides program and project implementation guidance to the County for their buyout and other housing programs.

Program Manager | State of Florida, Department of Economic Opportunity

- » Managed the subrecipient functional areas for CDBG-DR, focusing on initiatives such as Voluntary Home Buyouts and Hometown Revitalization projects.
- » Oversaw a team of Grant Managers across all Disaster Recovery subrecipient programs, ensuring alignment with program objectives and compliance.
- » Provided technical assistance and training to CDBG-DR subrecipients to enhance their capacity in implementing effective housing solutions.

Ashley Napier

Program Manager



- » Managed reports and necessary program documentation regarding subrecipient activities, ensuring transparency and accountability in the use of funds.
- » Reviewed and approved program budgets and reimbursement requests, prioritizing projects that supported community revitalization and recovery efforts.
- » Analyzed and managed project risk to mitigate potential issues and ensure successful program execution.
- » Conducted on-site monitoring visits to evaluate the effectiveness of Voluntary Home Buyout initiatives and housing programs.
- » Established and maintained partnerships both internally and externally to enhance collaboration and support for Voluntary Home Buyout and Hometown Revitalization efforts.

Government Operations Consultant III | State of Florida, Department of Economic Opportunity |

- » Supervised and provided guidance to the Hurricane Michael Recovery/Infrastructure staff.
- » Provided technical assistance and training to CDBG-DR subrecipients.
- » Managed reports and necessary program documentation regarding subrecipients grants.
- » Analyzed and managed project risk.
- » Conducted on-site monitoring visits.

Employment History

Hagerty Consulting, Inc., Senior Managing Consultant, 2022 to Present

State of Florida, Government Operations Consultant, 2021 to 2022

Cabinet for Health and Family Services, Administrative Section Supervisor, 2019 to 2021

DXC Technology, Project Manager II, 2018 to 2019

Cabinet for Health and Family Services, Program Investigative Officer II, 2015 to 2018

Cabinet for Health and Family Services, Procedures Development Coordinator, 2013 to 2015

Education and Workforce Development Cabinet, Administrative Assistant III, 2009 to 2013

Education

- » Master of Management, Marketing Analytics, North Carolina State University, 2023
- » Bachelor of Science, Business Administration, North Carolina State University, 2021

Relevant Highlights

- » Provided services to New York City, in support of the Asylum Seeker Sheltering Project.
- » Provided services to Lee County, Florida, in support of Hurricane Ian recovery efforts and Miami-Dade County, Florida, in support of COVID-19 recovery.
- » Previous engagements with the FEMA PA program and grants management associated with recovery in Florida.
- » Strong organizational management and client needs fulfillment.

Professional Biography

Ms. Julia Zachgo is a recovery professional with a background in supply chain management and a Master of Management in Marketing Analytics. Since joining Hagerty Consulting, Inc. (Hagerty) in 2023, she has been a member of the team supporting recovery efforts in the State of Florida, notably for Hurricane Ian and the Novel Coronavirus (COVID-19) pandemic. She has recently started to aid New York City with its' Asylum Seeker Sheltering Project through executing the submission of reimbursement claims for sheltering costs. She has experience supporting the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program portfolio for Hagerty, culminating in managing documents and ensuring that clients can prevent appeals, audits, and duplication of benefits. Prior to Hagerty, she supported operations management for Tesla Motors and supported community activities in North Carolina related to children's empowerment and equity.

Relevant Professional Experience

Recovery Consultant | New York City Asylum Seeker Associate | Hagerty Consulting, Inc.

- » Created data management process which identified unclaimed costs of Asylum Seekers at Non-Sanctuary sites with the integration of various data sets.
- » Developed a project timeline for total reimbursement claims.
- » Created and managed project progress tracker to demonstrate asylum seeker reimbursement development.

Recovery Consultant | Lee County Hurricane Ian Recovery Task Force Assistance | Hagerty Consulting, Inc.

- » Managed FEMA PA Category B project formulation related to the COVID-19 pandemic emergency and Hurricane Ian.
- » Delivered project worksheet (PW) and damage assessments to consultants and clients for the purpose of inclusion in submission of applications.
- » Supported logistics and implementation of CDBG-DR Action Plan Community Engagement efforts.

Field Representative | Miami-Dade County COVID-19 Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Category B COVID-19 project development for Miami-Dade County, Florida, in recovery support and supported appeals development and research.

Julia Zachgo

Grants Management Specialist



Operations Advisor | Tesla Motors

- » Delivered and scheduled 3400 cars last quarter to reach over four times the delivery average with operational team.
- » Led logistical operations and established new vendor relationships for all damaged factory vehicles to meet delivery goals.
- » Managed scheduling of over 300 on-site and in-transit vehicles per week to meet quarterly yield of 99 percent.
- » Leading operations in Q2 at new delivery center in Silver Spring, Maryland.

Advanced Technologies and Life Sciences Supply Chain Intern | Fluor

- » Ranked and cleaned over 11,000 contractors to create a national database based on spend marks to drive data-driven touchpoints.
- » Created visuals that connected procurement and construction progress for a billion-dollar proposal.
- » Planned team-building event boosting office morale and cohesiveness through a pandemic environment.
- » Created the 2021 RTP Community Plan; increased overall engagement by three times from previous year.

Corporate Sales Intern | Palo Alto Networks and CloudGenix

- » Prospected various accounts through email, cold call, and LinkedIn messaging.
- » Constructed Salesforce reports to display key sales metrics for Major Rep territories.
- » Conducted 300 cold calls in a day to increase conference attendance for CloudGenix
- » Performed a 25 minute first-meeting presentation on CloudGenix Application based SD-WAN.

Employment History

Hagerty Consulting, Inc., Recovery Associate, 2023 to Present

Tesla Motors, Operations Advisor, 2022

Fluor, Advanced Technologies and Life Science Supply Chain Intern, 2021 to 2022

Palo Alto Networks and CloudGenix, Corporate Sales Intern, 2019 to 2021

Madeline Stoddart, MPA

Grants Management Specialist



Education

- » Master of Public Administration, New York University, 2017
- » Bachelor of Science, Georgia Institute of Technology, 2010
- » Arabic Language Institute and Study Abroad, the American University in Cairo, 2009

Relevant Highlights

- » Directed oversight and management of more than \$675M in FEMA PA COVID-19 funds for hospitals and universities
- » Directed oversight and management of several clients Hurricane Michael recovery portfolios (+25M)
- » Direct oversight and management of NYC's Hurricane Sandy Recovery portfolios (+\$1B)
- » Skilled in analysis, requirement definition, and business process improvement related to the federal grant management.
- » Skilled in policy analysis, including federal and state procurement requirements.
- » Experience with tools, data analysis, and software used for financial and grant management and econometric research.
- » Field organizer in areas of public health, community and economic development organization, and civil society strengthening.

Professional Biography

Ms. Madeline Stoddart is a senior recovery analyst with more than seven years of disaster cost recovery experience, specializing in policy and program analysis, cost recovery planning, federal funds management, and stakeholder engagement.

Ms. Stoddart currently leads a team managing more than \$675 million in Federal Emergency Management Agency (FEMA) Public Assistance (PA) funding and more than \$300 million in Health Resources and Services Administration (HRSA) Provider Relief Funds (PRF) for hospitals and universities for their response to the Novel Coronavirus (COVID-19). Ms. Stoddart is skilled in policy and program analysis, supporting Hagerty's review and analysis of navigating new and changing programs and processes related to disaster preparedness, response, and recovery. She has extensive experience in tailoring disaster recovery support to specific client needs and long-term recovery goals, having managed multiple clients and recovery programs for clients after COVID-19, Hurricane Michael, and Hurricane Sandy. In her support of New York City's (NYC's) Hurricane Sandy Recovery, Ms. Stoddart developed and implemented change management strategies designed to engage stakeholders and build the City's overall capacity to manage multiple streams of federal funding effectively and efficiently.

Ms. Stoddart's recovery experience includes in-depth financial and policy analysis, development of grant management software and processes, and developing and implementing guidance related to policy, procurement and contract requirements, grant management closeout processes, and audit-readiness. She has also developed workflows and evaluation tools in the fields of public health education, program design, international education, and community engagement. Prior to joining Hagerty Consulting, Inc. Ms. Stoddart's work focused on long-term community and economic development, focusing on public health, access to public services, stakeholder engagement, and long-term economic growth.

Madeline Stoddart, MPA

Grants Management Specialist



Relevant Professional Experience

Deputy Project Manager | Washington State Hospital and University Portfolio | Hagerty Consulting, Inc.

- » Directly managed multiple clients in recovery from COVID-19, including FEMA PA grants, HRSA PRF, *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act) funding, *American Rescue Plan Act* (ARPA) funding, and State appropriations specific to COVID-19 response.
- » Developed a cost recovery planning template and framework for healthcare and university clients to maximize use of federal funding, minimize duplication of benefits, and implement internal processes to track and document response and recovery-related costs for potential reimbursement.
- » Development and implementation of Grant Management System (GMS) for multiple clients to track financial data, grant development, documentation, reimbursement, and closeout and audit readiness.

Cost Recovery Subject Matter Expert | Kansas Division of Emergency Management | Hagerty Consulting, Inc.

- » Developed cost recovery framework and tools for Kansas' State and local recovery plans, focusing on policy and process improvement to reduce administrative burden for financial recovery under state and federal funding programs, such as FEMA PA, United States (US) Department of Housing and Urban Development (HUD) Community Development Block Grant – Disaster Recovery (CDBG-DR), FEMA Hazard Mitigation Grant Program (HMGP), and Building Resilient Infrastructure and Communities (BRIC) funding.
- » Co-facilitated tabletop exercises for county emergency management teams developing local recovery plans, focusing on whole-community response, operations planning and coordination, and cost recovery planning.
- » Developed tools and resources to build capacity to obtain, manage, and retain federal funds.

Technical Assistance Advisor | Bloomberg E311 Program | Hagerty Consulting, Inc.

- » Provided real-time policy analysis for federal funds management under Bloomberg Philanthropies and US Council of Mayors helping cities identify, obtain, and retain federal funding for COVID-19 recovery and response efforts, specializing in CARES Act funding, Coronavirus State and Local Fiscal Recovery Funds (SLFRF), and ARPA funding.
- » Developed best case practices for federal funds management, specializing in cost recovery planning, program administration, subrecipient monitoring, compliance, audit-readiness, procurement and contracting processes, and documentation management under federal awards.

Policy and Technical Assistance Advisor – CTEH Arkansas CARES Funds Management | Hagerty Consulting, Inc.

- » Provided technical process and policy analysis for federal funds management for the State of Arkansas coronavirus relief funding, including FEMA PA, FEMA Lost Wages Assistance funding, CARES Act funding, Coronavirus SLFRF, and ARPA funding.
- » Supported development of processes and internal controls for Subrecipient Award Process, focusing on compliance and monitoring of subawards, financial reporting, and documentation management.

Madeline Stoddart, MPA

Grants Management Specialist



Policy and Technical Assistance Planner | Maryland Hospital Association | Hagerty Consulting, Inc.

- » Developed the Association's policy and procedures for the management of federal and state grants, specifically HHS' Administration for Strategic Preparedness Hospital Preparedness Program, a cooperative agreement to support hospitals and healthcare networks plan for and respond to large-scale emergencies and disasters.
- » Engaged with stakeholders to review and recommend improvements to existing internal control and oversight processes, documentation management controls, and formalized subaward processes for disbursement of federal funds.

Deputy Project Manager | Panama City, FL Hurricane Michael Recovery Projects | Hagerty Consulting, Inc.

- » Directly managed multiple clients in recovery from Hurricane Michael, including FEMA PA grants, US HUD CDBG-DR, FEMA HMGP, and Florida Housing Finance Coalition Hurricane Housing Recovery Program funding.
- » Managed development of a coordinated long-term strategic approach for County-wide Hurricane Michael housing recovery program, including draft Action Plan proposal for CDBG-DR funding, capacity building to manage more than \$40 million in State-funded housing programs, and internal program and process improvement to meet compliance and reporting requirements.
- » Coordinated detailed policy analysis of HUD CDBG-DR and Florida Department of Economic Opportunity (DEO) eligibility, reporting, and compliance requirements, including FEMA PA and HMGP local match requirements.
- » Successful appeal of FEMA Determination memo valued at \$2+ million to defend the eligibility of local implementation of the Private Property Debris Removal program.
- » Successful application for Florida DEO Job Growth Grant Fund for \$2.8 million in public infrastructure funding to support Panama City's recovery from Hurricane Michael.
- » Development and implementation of Disaster Financial Management System for multiple clients to track financial data, grant development, reimbursement and closeout and audit readiness.

Senior Compliance and Monitoring Analyst, Federal and State Grants Monitoring Taskforce | New York City Mayor's Office of Management and Budget

- » Directly managed multiple city agency Hurricane Sandy recovery portfolios, providing support, analysis, and oversight for NYC's \$9.5 billion in FEMA PA grants and coordination with HUD CDBG-DR local match projects.
- » Managed development of city-wide document management system for Sandy recovery grants to meet federal grant record retention requirements, improve grant management business processes, and mitigate audit risks.
- » Analyzed PA reimbursement and closeout processes, including developing guidance and analytical tools to improve compliance, diagnosing trends, assessing risk, and streamline grant management and compliance activity.
- » Engaged key agency partners in risk and needs analysis, communicated technical and policy conformance requirements, defined critical roles, responsibilities, and expectations, and improved the City's capacity to manage federal grants.

Graduate Teaching Assistant | New York University Robert F Wagner School of Public Service

- » Conducted more than 100 teaching hours covering basic economic evaluation and statistical evaluation concepts, introduction to econometric analysis and research, and applied public policy research concepts using Software for Statistics and Data Science (STATA).
- » Tutored students in microeconomics, multiple regressions and data analysis, and applied statistics.

Madeline Stoddart, MPA

Grants Management Specialist



Health Education Advisor, Kyrgyzstan | US Peace Corps

- » Developed site-specific monitoring, reporting, training, and evaluation tools for the Peace Corps Kyrgyzstan Health Education Program and local community partners, including the National Center for Health Promotion.
- » Designed and implemented national project for appreciative inquiry-driven strategic planning for community-based health promotion network, impacting more than 1,200 unique organizations.
- » Administered impact and process evaluation for national public health interventions on tuberculosis, brucellosis, Hepatitis A, HIV, and pre/ante-natal nutrition, providing quantitative and qualitative analysis of program implementation.

Intern, US Embassy - Syria | US Department of State, Office of Public Diplomacy

- » Supported public diplomacy initiatives, including coordinating a Congressional Delegation and implementation of the Fulbright Specialist Program.
- » Coordinated capacity building programs and funding opportunities for civil society and community organizations.

Intern, Competitive Bids, Information, and Cost Support | CARE USA

- » Supported proposal response preparation for federal and international funding, including stakeholder coordination, funding and policy research, and developing a database of past performance references.

Employment History

Hagerty Consulting, Recovery Manager, 2024 to Present

Hagerty Consulting, Senior Managing Associate, 2021 to 2023

Hagerty Consulting, Managing Associate, 2019 to 2020

New York, New York Mayor's Office of Management and Budget, Senior Compliance and Monitoring Analyst, 2016 to 2018

NYU Robert F Wagner School of Public Service, Graduate Teaching Assistant, 2016 to 2017

US Peace Corps - Kyrgyzstan, Health Education Advisor, 2013 to 2015

Organizing for America, Field Organizer, 2012

The American University in Cairo, Admissions Counselor and Recruiter, 2011 to 2012

US Department of State, US Embassy – Syria Public Diplomacy Intern, 2009 to 2010

CARE USA, Intern, 2009

Resumes: Task 15

Education

- » Executive Leadership Program, US Naval Postgraduate School/Center for Homeland Defense and Security
- » Master of Public Administration/Government Public Management, Appalachian State University
- » Bachelor of Science, Criminal Justice, Appalachian State University

Relevant Highlights

- » Former Administrator of FEMA, coordinated federal government response to over 144 Presidential Major Disaster Declarations and 112 wildfires
- » Led revision to the National Response Framework to include a new Emergency Support Function (ESF-14) for Cross Sector Infrastructure Coordination
- » Launched the Community Lifelines Doctrine for FEMA
- » Developed/implemented FEMA Integration Teams to embed staff alongside state and tribal partners
- » Neil Frank Award, National Hurricane Conference, 2021
- » Distinguished Alumni Award, Appalachian State University, 2019
- » Good Samaritan Award, Samaritan's Purse, 2019

Professional Biography

Mr. William "Brock" Long is the former Administrator of the Federal Emergency Management Agency (FEMA) and a 23-year veteran of emergency management and homeland security, with progressive experience assisting and supporting local, state, and federal governments to build robust emergency management and public health preparedness programs nationwide. He specializes in evacuation, public safety, recovery management, and response logistics. He has supported the development of pre-disaster planning and post-disaster long-term recovery efforts to help cities, counties, states, and the United States (US) increase resilience against future disasters and enhance response capabilities.

As the FEMA Administrator, Mr. Long served as the nation's principal advisor to the President, responsible for coordinating the entire array of federal government resources down through 50 states, 573 tribal governments, and 16 island territories to assist with executing disaster preparedness, mitigation, response, and recovery. Mr. Long is also the former Director of the Alabama Emergency Management Agency where he acted as the State Coordinating Officer (SCO) for 14 disasters, including eight Presidential Major Disaster Declarations, six state declared events, and two events of national significance. Concurrently, he served on the FEMA National Advisory Committee (NAC) advising the sub-committee for response and recovery. During the nationally significant Deepwater Horizon Oil Spill Incident, Mr. Long served as the on-scene Incident Commander for the Alabama Unified Command.

Mr. Long has been called upon twice to testify before the US Congress regarding response to, and recovery from, catastrophic events. His opinion has been sought by numerous media outlets including CNN, the Associated Press, and the Weather Channel. He also has authored or contributed to several publications.

Mr. Long provides strategic direction and leadership to Hagerty Consulting, Inc.'s (Hagerty) full complement of emergency management programs and professionals, offering subject matter expertise for select projects and contributing as a thought leader to the growing body of knowledge in the emergency management community. He has been instrumental in supporting Hagerty's response and recovery missions, providing executive advisory support to numerous state and local emergency management directors and providing policy guidance on strategic issues.

Relevant Professional Experience

Administrator | Federal Emergency Management Agency

- » Led 21,000 diverse and dedicated public servants and executed a multi-billion-dollar operating budget (\$15.9 billion annual appropriation/more than \$44 billion Disaster Relief Fund).
- » Coordinated the federal government's response to over 144 Presidential Major Disaster Declarations and 112 wildfires, including three of the nation's most devastating hurricanes and five of the worst wildfires ever experienced.
- » Directed the US Fire Administration, the Center for Domestic Preparedness, Emergency Management Institute, and National Domestic Preparedness Consortium, responsible for establishing and improving competencies of officials within public safety at all levels of government charged with protecting against, responding to, and recovering from emergencies.
- » Rapidly transformed the agency's business enterprise by implementing the innovative Community Lifeline and FEMA Integration Team (FIT) concepts to strengthen private/public partnerships and permanently embed full-time FEMA professionals within state and tribal governments to better meet constituent needs.
- » Influenced federal legislation through 12 Congressional testimonies, resulting in the passage of the Disaster Recovery Reform Act (DRRA) that made Pre-Disaster Mitigation a national priority, provided meaningful changes to the FEMA workforce, and bolstered state and local emergency management capability.
- » Executed the National Flood Insurance Program (\$1.3 trillion exposure/five million policy holders) and implemented cutting-edge reinsurance capital market concepts that saved taxpayers approximately \$1 billion during Hurricane Harvey.
- » Ensured continuity for the entire Executive Branch of government on behalf of the White House. Preserved the nation's ability to make sure government mission essential functions continued regardless of any threat or emergency.

Executive Level Advisor | Florida Division of Emergency Management COVID-19 Response Support | Hagerty Consulting, Inc.

- » Provided support for the Florida Division of Emergency Management (FDEM) in response to COVID-19.
- » Guided the development of community-based test site procedures; supported strategic implementation of mass care and feeding efforts throughout the State of Florida; and assisted with the creation of a non-congregate shelter program to support co-response operations during the 2020 hurricane season.

Project Advisor | Texas General Land Office Alternative Housing Study Phase I and Phase II | Hagerty Consulting, Inc.

- » Supported the Texas General Land Office in performing studies relating to alternative housing for disaster recovery efforts, including addressing the challenges of co-disasters like the COVID-19, flooding, and hurricanes.
- » Provided expertise in the implementation of temporary housing programs under the FEMA Individual Assistance (IA) Program and points of integration with the Community Development Block Grant – Disaster Recovery (CDBG-DR) Program.

Brock Long

Project Executive/Subject Matter Expert



Director | Alabama Emergency Management Agency and Deputy Director of the Alabama Department of Homeland Security

- » Appointed as the Governor's Authorized Representative and State Coordinating Officer for eight Presidential Major Disaster Declarations, and six state declared disaster events, including executing the state's response to the H1N1 pandemic flu threat.

Employment History

Hagerty Consulting, Inc., Executive Chairman, 2019 to Present

Federal Emergency Management Agency, Administrator, 2017 to 2019

Hagerty Consulting, Inc., Executive Vice President, 2011 to 2017

Alabama Emergency Management Agency, Director, 2008 to 2011

Beck Disaster Recovery, Inc., Southeast Regional Director, 2007 to 2008

Federal Emergency Management Agency, Hurricane Program Manager, 2001 to 2006

Georgia Emergency Management Agency, Statewide Planner/School Safety Coordinator, 1999 to 2001

Education

- » Master of Public Administration, New York University
- » Bachelor of Science, Rutgers College

Relevant Highlights

- » Experienced disaster mitigation, preparedness, and recovery planner
- » More than 20 years managing complex domestic and international response and recovery projects
- » Founded and managed a global disaster relief non-profit organization

Training and Certifications

- » Master Exercise Practitioner (MEP)
- » Professional Development Series
- » Homeland Security Exercise and Evaluation Program (HSEEP) certified
- » Incident Command System (ICS) Train-the-Trainer certified

Professional Biography

Ms. Amelia Muccio is the Director of Mitigation with Hagerty Consulting, Inc. (Hagerty), and has more than 20 years of experience strategizing, leading national and international mitigation, preparedness, response, and recovery projects. Ms. Muccio has worked on all-hazards planning and policy development, grants management and evaluation, capacity building, *Robert T. Stafford Disaster Relief and Emergency Assistance Act* (Stafford Act) Sections 404/406 mitigation, Building Resilient Infrastructure and Communities (BRIC), continuity of operations, training, and exercises.

Ms. Muccio has extensive demonstrated experience as a robust project leader and subject matter expert in support of mitigation and cost recovery work related to a series of grants and funding sources. She directly supported the resiliency of 16 city agencies for New York City (NYC) during immediate Hurricane Sandy recovery needs. Between August 2013 and May 2018, Ms. Muccio spearheaded the submission of a \$1.1 billion Hazard Mitigation Grant Program (HMGP) Section 404 portfolio on behalf of the city as part of larger risk management and preparedness efforts. For Section 406 and 404, Ms. Muccio oversees the mitigation recovery effort for New York City agencies and the Office of Management and Budget (OMB) with a continuously expanding portfolio valued at \$2.2 billion.

For the last six years, Ms. Muccio has led a team of over 20 team members and subcontractors in support of the California Governor's Office of Emergency Services (Cal OES) Hazard Mitigation Assistance (HMA) Branch. In addition to project management support, Ms. Muccio is the technical lead for all the HMA programs, but most specifically, the BRIC program, which has received the most funding (by a State) to date. Most recently, she led the submission of the BRIC Fiscal Year 2023 – Capability and Capacity Building (C&CB) allocation, building codes plus-up, and competitive projects for over \$500 million (federal share). Over 70 percent of the projects included nature-based solutions, and over 80 percent benefit socially vulnerable communities per federal requirements.

Relevant Professional Experience

Hazard Mitigation Assessment Advisor | California Governor's Office of Emergency Services, Surge Capacity Staffing | Hagerty Consulting, Inc.

- » Provides project management support as the team lead to the Cal OES Hazard Mitigation Branch and the Hagerty Mitigation Team.
- » Provides cradle to grave subject matter expertise and project management support for 12 presidentially declared disasters with HMGP funding opportunities.
- » Assisted Cal OES on their BRIC 2020 through 2023 submission; California was awarded the highest competitive funding amount for these fiscal years.
- » Provided project management on the review and adjudication of approximately 2,400 Notices of Interest (NOIs) and the technical review for programmatic, feasibility, and Environmental and Historic Preservation (EHP) components of approximately 735 submitted subapplications totaling \$6.3 billion in project costs, and the management of \$3.5 billion in grants.
- » Provided implementation expertise to the Cal OES Flood Mitigation Assistance, HMGP post-fire, and Congressionally Directed Pre-Disaster Mitigation programs.
- » Developed and delivered over 180 capacity building webinars for Cal OES staff and eligible subapplicants on the HMA Program.

Mitigation Subject Matter Expert | Montgomery County, Texas Pre- and Post-Disaster Support | Hagerty Consulting, Inc.

- » Provided support for Hagerty teams currently supporting pre-and post-disaster support related to the Novel Coronavirus (COVID-19) emergency and concurrent disaster events.
- » Oversaw and developed debris monitoring operations, HMGP applications, Community Development Block Grant – Disaster Recovery (CDBG-DR) and -Mitigation (CDBG-MIT) applications, and COVID-19 response management.

Senior Project Manager | Nebraska Emergency Management Agency Mitigation Services Contract | Hagerty Consulting, Inc.

- » Assisted with the immediate implementation and administration of the HMGP for DR-4420 and the Federal Emergency Management Agency (FEMA) HMA Programs generally. Directed technical assistance on application review, technical reviews of benefit-cost analysis (BCA), EHP compliance, and procedural improvements for the implementation of the State mitigation program.

Subject Matter Expert | City of Panama City, Florida Disaster Recovery | Hagerty Consulting, Inc.

- » Reviewed project with City leadership and engaged the citizenry to develop a Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.
- » Developed engagement events with the public through the early summer of 2019 to identify how people want to build back the city, taking advantage of the FEMA 428 Alternative Procedures to remove severely damaged buildings that were not being fully utilized to create more green spaces and community areas.

Amelia Muccio

Project Executive/Subject Matter Expert



Project Manager/Team Lead | New York City Office of Management and Budget Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- » Managed 10-person team and coordinated with NYC agencies on technical assistance issues, including Project Worksheet (PW) development and hazard mitigation.
- » Developed proposals, cost effectiveness determinations, Request for Information (RFI) responses, campus-based mitigation solutions, 428 Alternative Procedures, and programmatic eligibility.
- » Submitted a \$1.1 billion HMGP portfolio. Oversaw Section 406 expanding portfolio valued at \$2.2 billion.

Project Manager | New York City Office of Management and Budget Hurricane Sandy Recovery, Section 404 Hazard Mitigation Grant Program | Hagerty Consulting, Inc.

- » Managed 17-person team during the Letter of Intent and initial application phase; coordinated with city agencies for technical assistance issues including scope of work changes, BCA, RFI responses, EHP, advance assistance application requests, and technical feasibility.
- » Developed 43 HMGP applications for NYC agencies. Provided ongoing technical assistance to NYC for HMGP applications.

Director, Haiti Project and Disaster Operations | Humane Society International

- » Provided emergency management, international development, and public health expertise to ongoing recovery projects in Japan and Haiti; provided direct, field oversight in Haiti to staff of 12.
- » Coordinated field disaster response and zoonotic disease surveillance for Haitian veterinarians including 2012's Tropical Storm Isaac and Hurricane Sandy.
- » Advised Haitian Ministries on emergency management; developed first all hazards disaster preparedness training for high-ranking government officials.

Cities Readiness Initiative Exercise and Training Consultant | City of Portland Department of Health and Human Services

- » Coordinated Portland's Cities Readiness Initiative (CRI) training and exercise program designed to maximize response capabilities during large scale public health emergencies. Planned, conducted, and evaluated CRI training and exercises focused on mass prophylaxis and point of distribution effectiveness.

Employment History

Hagerty Consulting, Inc., Director of Mitigation, 2017 to Present

Hagerty Consulting, Inc., Senior Managing Associate, Recovery, 2013 to 2017

The Humane Society of the United States, Director, Haiti Project and Disaster Operations, 2011 to 2013

New Jersey Primary Care Association, Director of Emergency Management/Bioterrorism Educator, 2004 to 2011

The Humanitarian Project, Founder/Executive Director, 2004 to 2010

Education

- » Bachelor of Arts, Political Science, York College of Pennsylvania, 2009

Training and Certifications

- » National Incident Management System (NIMS): 100, 200, 300,400,700,800
- » Planning Section Chief
- » Community Emergency Response Team
- » E-Team Incident Management System

Relevant Highlights

- » Experience identifying funding opportunities, managing project applications, and overseeing compliance for CDBG-DR, CDBG-Mitigation(-MIT) and CDBG-Novel Coronavirus (COVID) programs and funding streams
- » Skilled in Grant Development, Project Closeout, and Contract Management

Professional Biography

Ms. Laura Munafo is a disaster recovery consultant with over 12 years of experience in disaster recovery and United States Department of Housing and Urban Development (HUD)-funded program implementation. She most recently served as Deputy Project Manager for the State of Nebraska in the development of its Community Development Block Grant – Disaster Recovery (CDBG-DR) Action Plan and provided technical assistance to the Nebraska Department of Economic Development on the implementation and closeout of its CDBG-DR Programs. Ms. Munafo also supported the development and implementation of CDBG-DR Action Plans for St. Louis County, Missouri, Mobile County, Alabama, and Manatee County, Florida, providing strategic guidance and ensuring HUD compliance across housing and infrastructure recovery initiatives.

Additionally, she supported Montgomery County, Texas, by preparing program guidance for the County's CDBG-DR Buyout Program. Prior to joining Hagerty Consulting, Inc. (Hagerty), Ms. Munafo served for six years as Deputy Director of the New York State Governor's Office of Storm Recovery, where she led recovery efforts following Hurricane Sandy. Her work included organizing public engagement events, managing resilience grant programs, and coordinating with local, state, and federal partners to ensure integrated recovery operations.

Relevant Professional Experience

Deputy Project Manager | Manatee County, Community Development Block Grant – Disaster Recovery Action Plan and Program Design | Hagerty Consulting, Inc.

- » Coordinate project workflows and communication between Hagerty team members and Manatee County staff to ensure timely progress on all CDBG-DR Action Plan deliverables.
- » Track project milestones and developed regular status updates, briefing materials, and dashboards to support County leadership and HUD-required reporting.
- » Oversee document management and compliance tracking systems, ensuring all records, reports, and deliverables were accurate, consistent, and audit-ready.
- » Provide deputy-level leadership by facilitating team calls, monitoring task deadlines, and stepping into project management responsibilities as needed to maintain project momentum.

Project Manager | City of Panama City, Florida, Disaster Recovery Consultant Services | Hagerty Consulting, Inc.

- » In addition to Hagerty's contract to submit projects to FEMA and other federal agencies to recoup and rebuild, the City expanded Hagerty's responsibilities to work with the City leadership and engage the citizenry to develop the City's Long-Term Recovery Plan to make the City the premier location in the Florida Panhandle.

Project Manager | Mobile County, Alabama Community Development Block Grant – Disaster Recovery Grant Management | Hagerty Consulting, Inc.

- » Serves as Project Manager for the County's CDBG-DR Grant Management totaling \$28 million in funding.
- » Provides subject matter expertise for overall CDBG guidance to the County for its recovery from Hurricane Sally and Hurricane Zeta.
- » Assists the County in the build out of their Local Recovery Plan including an Unmet Need Assessment.
- » Provides program and project implementation guidance to the County for housing and non-housing CDBG activities.

Deputy Project Manager | State of Nebraska Community Development Block Grant – Disaster Recovery Infrastructure Match Program | Hagerty Consulting, Inc.

- » Serves as Deputy Project Manager and lead for the State's CDBG-DR Infrastructure Match Program totaling \$64 million in CDBG-DR funding.
- » Provides subject matter expertise for overall CDBG guidance to the State for its recovery from Severe Winter Storm, Straight-line Winds, and Flooding).

Mitigation/Recovery Project Manager | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development Consulting Services | Hagerty Consulting, Inc.

- » Assisted Montgomery County in CDBG-MIT project applications and preparing program guidance for the County's CDBG-DR Buyout Program.

Subject Matter Expert Infrastructure | United States Virgin Islands | Witt O'Brien's

- » Responsible for oversight and contract management of the United States Virgin Islands hurricane Irma and Maria Infrastructure Recovery Program; Electrical Repairs Program; Resiliency and Repair Program; and the Local Match Program.
- » Responsible for the build out of the United States Virgin Islands Local Match Program. Responsible for the development and execution of program policies and procedures.
- » Assisted in the development of grant applications and necessary CDBG-DR documents. Provided guidance to the United States Virgin Islands on infrastructure projects.

Deputy Director | Infrastructure and the New York Rising Community Reconstruction Program | New York State Governor's Office of Storm Recovery

- » Responsible for the oversight and contract management of eight interdisciplinary planning teams. Supported project and program development and implementation, as appropriate.
- » Provided direction and coordination to the local governments in Nassau County consistent with the recovery framework agreed upon by HUD and the New York State Governor's Office of Storm Recovery.

Laura Munafo

Program Manager



-
- » Contributed to the design and development of Rebuild by Design: Living with the Bay (LWTB) Project funded through HUD.
 - » Served as the program manager of LWTB, which included over 50 federal, state, and local stakeholders. Managed 17 projects within the LWTB project.
 - » Oversaw the design and development of microgrid projects through the State of New York.

Employment History

Hagerty Consulting, Inc., Disaster Recovery Manager, 2020 to Present

Witt O'Brien's, Community Development Block Grant – Disaster Recovery Subject Matter Expert, 2019 to 2020

New York Governor's Office of Storm Recovery, Deputy Director, 2013 to 2019

Nassau County, New York, Emergency Management, Community Services Representative, 2012 to 2013

Nassau County Executive's Office, Executive Assistant, 2010 to 2012

Education

- » Master of Public Policy, Harvard Kennedy School, 2023
- » BA, Public Policy, University of Chicago, 2017

Relevant Highlights

- » Federal grant management and administration, including experience with the DRGR
- » CDBG-DR and CDBG-MIT administration
- » Experience with DRGR

Professional Biography

Ms. Leah Kessler is a disaster recovery and community development professional with specialized experience in climate resiliency. As a Presidential Management Fellow, she supported multiple offices within the United States Department of Housing and Urban Development (HUD) where she supported disaster recovery, guided recipients of the Community Development Block Grant-Disaster Recovery (CDBG-DR), served as a subject matter expert for the Disaster Recovery Grant Reporting (DRGR) System, and provided technical assistance for CDBG applicants and recipients. In addition, she has supported the National Oceanic and Atmospheric Administration (NOAA) with spearheading an equitable grantmaking initiative to increase access to climate resilience and adaptation grants, improving agency grantmaking efficiency, and integrating equity into NOAA-wide policies.

Relevant Professional Experience

Recovery Consultant | Montgomery County, Texas, Community Development Block Grant Management | Hagerty Consulting, Inc.

- » Provided technical support for Montgomery County's approximate \$70 million CDBG-Mitigation (-MIT) grant program.
- » infrastructure initiative, contributing to the planning, design, and implementation of mitigation and resilience projects.
- » Authored comprehensive policies and procedures for Section 3, *Davis-Bacon Act*, *Uniform Relocation Assistance and Real Property Acquisition Policies Act* (URA), and Environmental Review Requirements, ensuring federal compliance and streamlining program operations.
- » Provided strategic guidance on Section 3 and URA implementation, advising County leadership on best practices to minimize displacement and optimize community benefits.

Management and Program Analyst | United States of Department of Housing and Urban Development, Office of Disaster Recovery

- » Advised department leadership on housing policy and community development strategies, shaping affordable housing solutions that expanded access for low- and moderate-income residents.

Leah Kessler

Program Manager



- » Oversaw and optimized federally funded disaster recovery and resilience grants through CDBG-DR, improving fund allocation and compliance while strengthening state and local governments' ability to implement risk mitigation and long-term recovery strategies.
- » Led regulatory and policy analysis, communicating complex federal programmatic guidelines, and advising New York State grant recipients on CDBG-DR implementation to maximize community impact.
- » Provided hands-on technical assistance to grantees, guiding them through federal regulations, conducting desk reviews and audits, and recommending corrective actions as needed.
- » Served as a subject matter expert on the DRGR System, a national database for managing and tracking CDBG-DR grants, ensuring compliance and effective grant oversight.

Special Assistant and Equity Advisor | National Oceanic and Atmospheric Administration (on detail for Department of Housing and Urban Development)

- » Spearheaded NOAA's equitable climate funding initiative, increasing access to climate resilience and adaptation grants for frontline communities. Developed a 100-page guide, user-friendly grant portal, and bias awareness training, ensuring federal funding supported equitable environmental outcomes.
- » Led the creation of NOAA's first-ever Organizational Values—Inclusion, Innovation, and Integrity—securing buy-in from 12,000 employees to integrate these values into agency culture and operations.
- » Developed NOAA's Equity Framework and Equitable Climate Services Action Plan, embedding equity across the agency's funding, programs, and operations.

Management and Program Analyst/Presidential Management Fellow | Department of Housing and Urban Development, Office of Block Grant Assistance

- » Advised entitlement communities on effective management and implementation of CDBG funds, ensuring compliance with federal regulations while maximizing funding impact for community development initiatives.
- » Led data analysis and impact assessments using PowerBI and Microsoft Access, generating insights that improved program evaluation and informed data-driven decision-making for senior leadership.
- » Evaluated and recommended applications for HUD's Pathways to Removing Obstacles to Housing program, supporting local governments reducing barriers to and expanding the supply of affordable housing.
- » Provided expert guidance on the Integrated Disbursement and Information System, a national database for administering and reporting on CDBG, ensuring proper fund management and regulatory compliance.

Employment History

Hagerty Consulting, Inc., Recovery Consultant, 2025 to Present

Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2024 to 2025

National Oceanic and Atmospheric Administration (on detail), Special Assistant and Equity Advisor (Presidential Management Fellow, 2024

Leah Kessler

Program Manager



Department of Housing and Urban Development, Management and Program Analyst (Presidential Management Fellow), 2023 to 2024

Harvard's Center for Public Leadership, Research Assistant, 2022 to 2023

Alaska Venture Fund, Consultant, 2022 to 2023

City of Anaheim, Mayoral Transition Term Fellow, January 2023

Office of Governor DeWine, Michael S. Dukakis Summer Fellow, June 2022 to August 2022

HeartShare St. Vincent's Services, Case Planner/2019 Children's Corps Fellow, 2019 to 2021

The Harman Firm, LLP, Law Clerk/Paralegal, 2017 to 2019

6. Examples

In accordance with the DCR's RFP, examples of our past performance have been provided on Attachment H. Should the DCR require any additional information regarding our past performance, to include client references, Hagerty will be happy to provide this information upon request.

ATTACHMENT H: EXPERIENCE

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

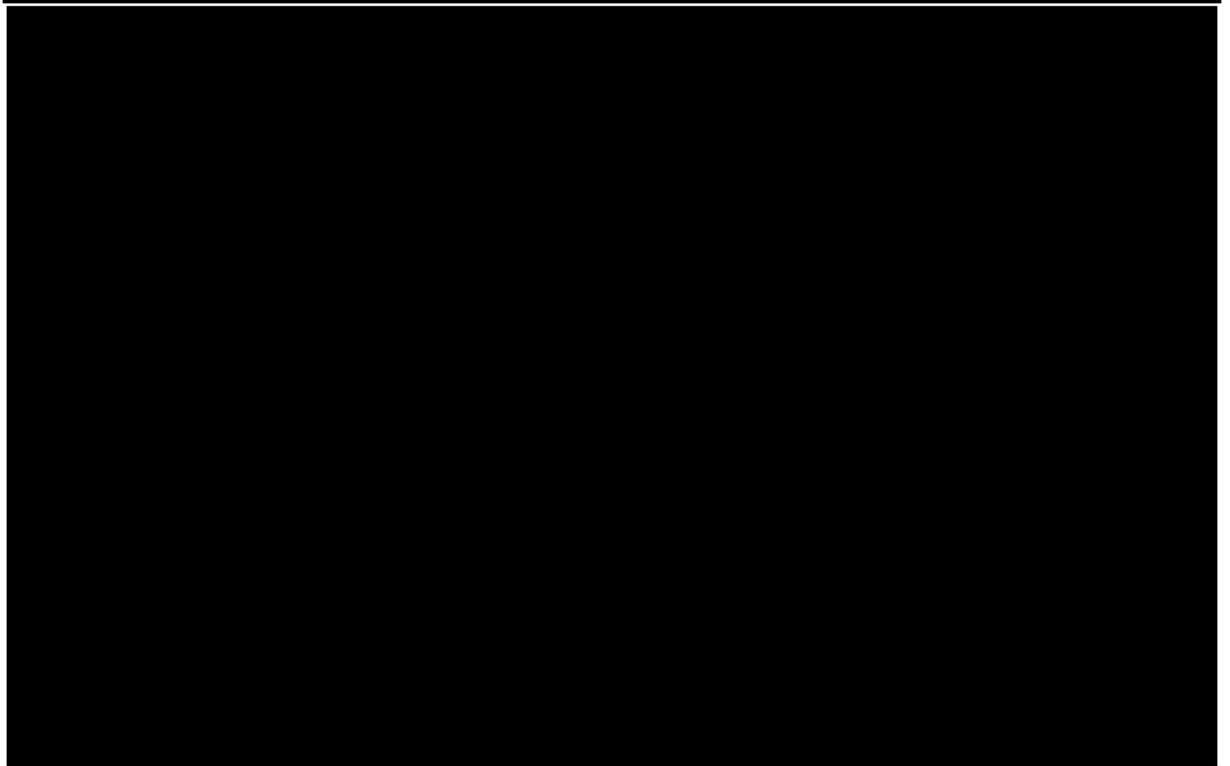
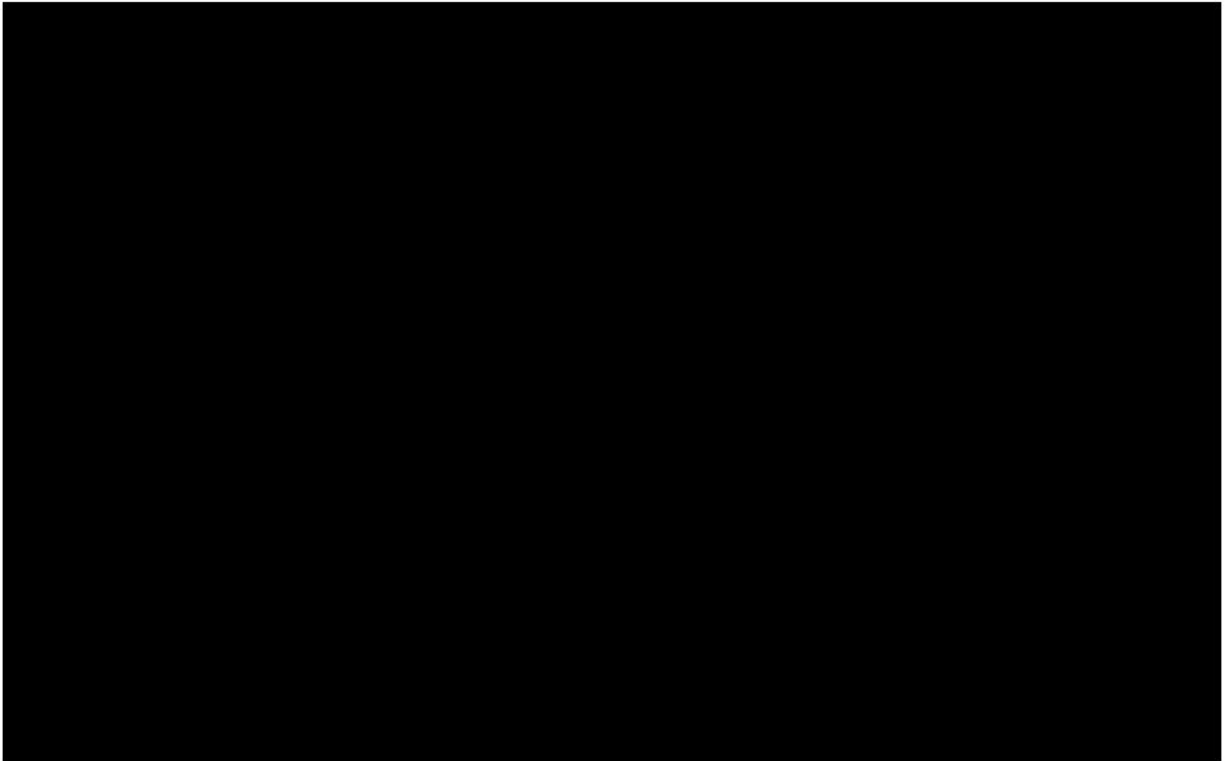
Example 1	
Client Name:	Nebraska Department of Economic Development
Program:	CDBG-DR Program for Winter Storm Ulmer
Brief Description of Services Rendered:	The State of Nebraska's Department of Economic Development (DED) procured Hagerty to support grant administration and implementation of their CDBG-DR Program for Winter Storm Ulmer which unleashed extensive flooding across the State. DED was awarded \$108.9 million in CDBG-DR funding to support long-term recovery primarily because of significant infrastructure damage attributable to Ulmer.

Example 2	
Client Name:	Manatee County, Florida
Program:	Grant Writing & Program Administration
Brief Description of Services Rendered:	After receiving \$252.7 million in CDBG-DR funds for recovery from Hurricanes Debby, Helene, and Milton, Manatee County engaged Hagerty to conduct an Unmet Needs Assessment, develop its HUD-approved Action Plan and Administrative Action Plan, complete required financial certifications, and design a robust public engagement process with more than 20 local stakeholders. Hagerty continues to provide program design, training, and technical assistance, positioning the County to implement its recovery programs effectively while building long-term capacity for compliance and locally driven recovery.

Example 3	
Client Name:	Bay County, Florida
Program:	Bay County Disaster Recovery Consulting Services
Brief Description of Services Rendered:	After receiving \$36 million in HHRP funds for Hurricane Michael recovery, Bay County requested support from Hagerty to conduct a housing unmet needs assessment, develop a Local Housing Assistance Plan, design and implement recovery programs, and train newly hired County Housing Division staff. Hagerty's program design and implementation support led to consecutive state-wide awards from the Florida Housing Coalition recognizing Bay County's ReHouse Bay Program for Outstanding Disaster Recovery Assistance (2022) and Success with Helping Households Overcome Substantial Obstacles to Homeownership (2023).

Example 4	
Client Name:	City of Panama City, Florida
Program:	City of Panama City Disaster Recovery Services
Brief Description of Services Rendered:	As a result to damage caused by Hurricane Michael, Hagerty supported the City of Panama City with its recovery, including securing and managing \$136 million in CDBG-DR funding and an additional \$214 million via other federal and state funding sources. The funding supported replacing underground infrastructure, improving exterior business facades throughout five of the City's historic business districts, and implementing a home buyout program.

Financial Documentation



Sincerely,



Katie Freeman

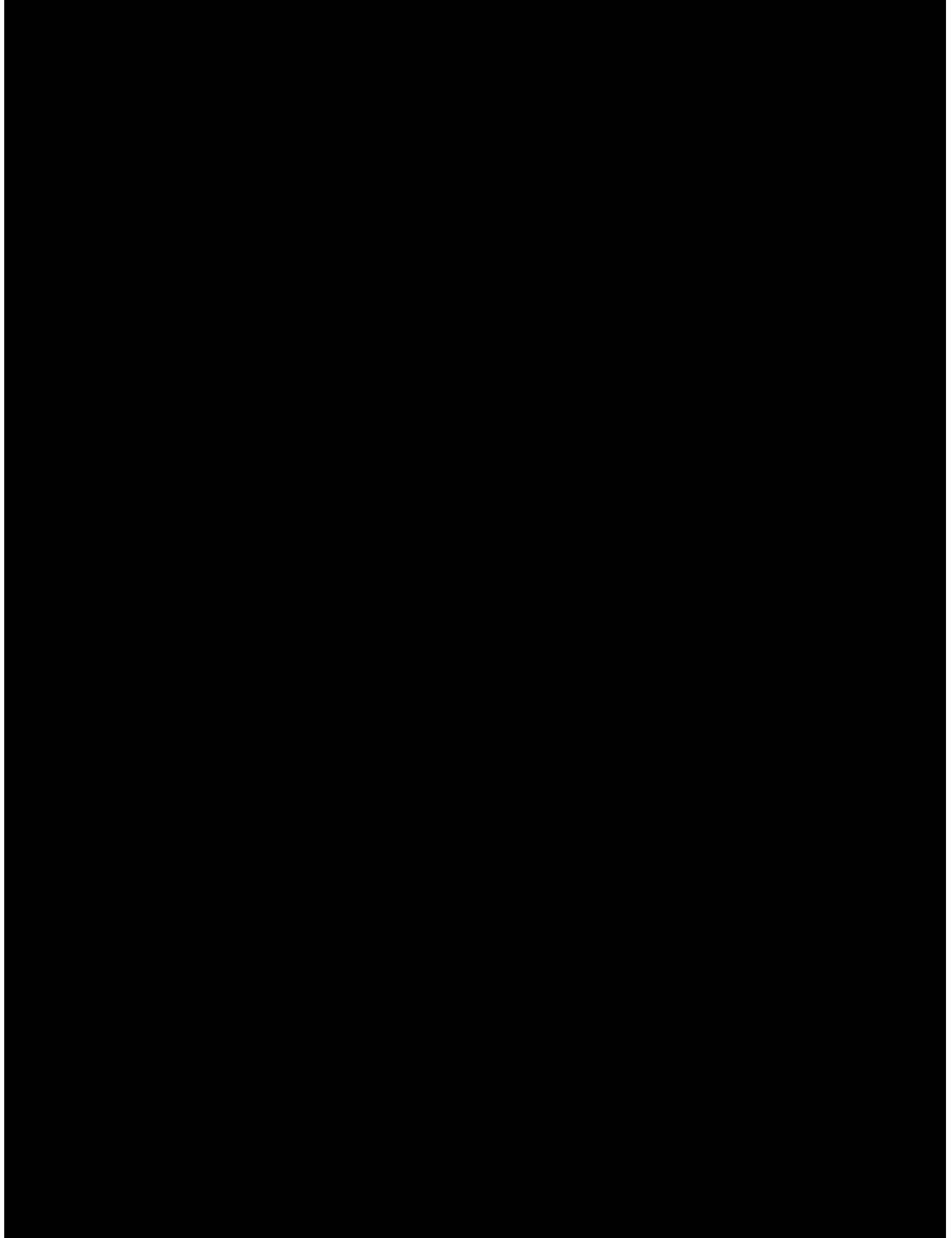
Director of Operations, Hagerty Consulting, Inc.

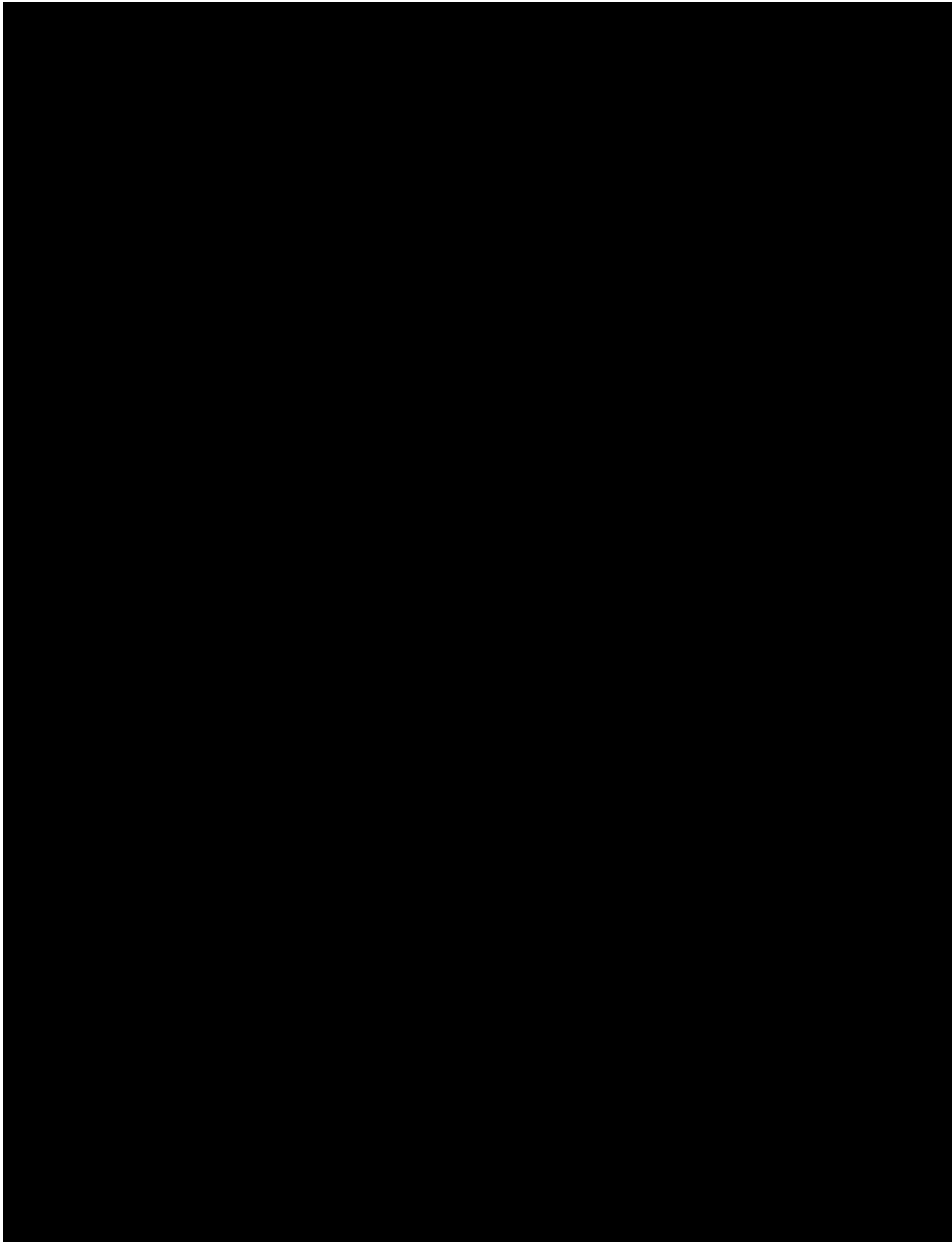
1618 Orrington Avenue, Suite 201

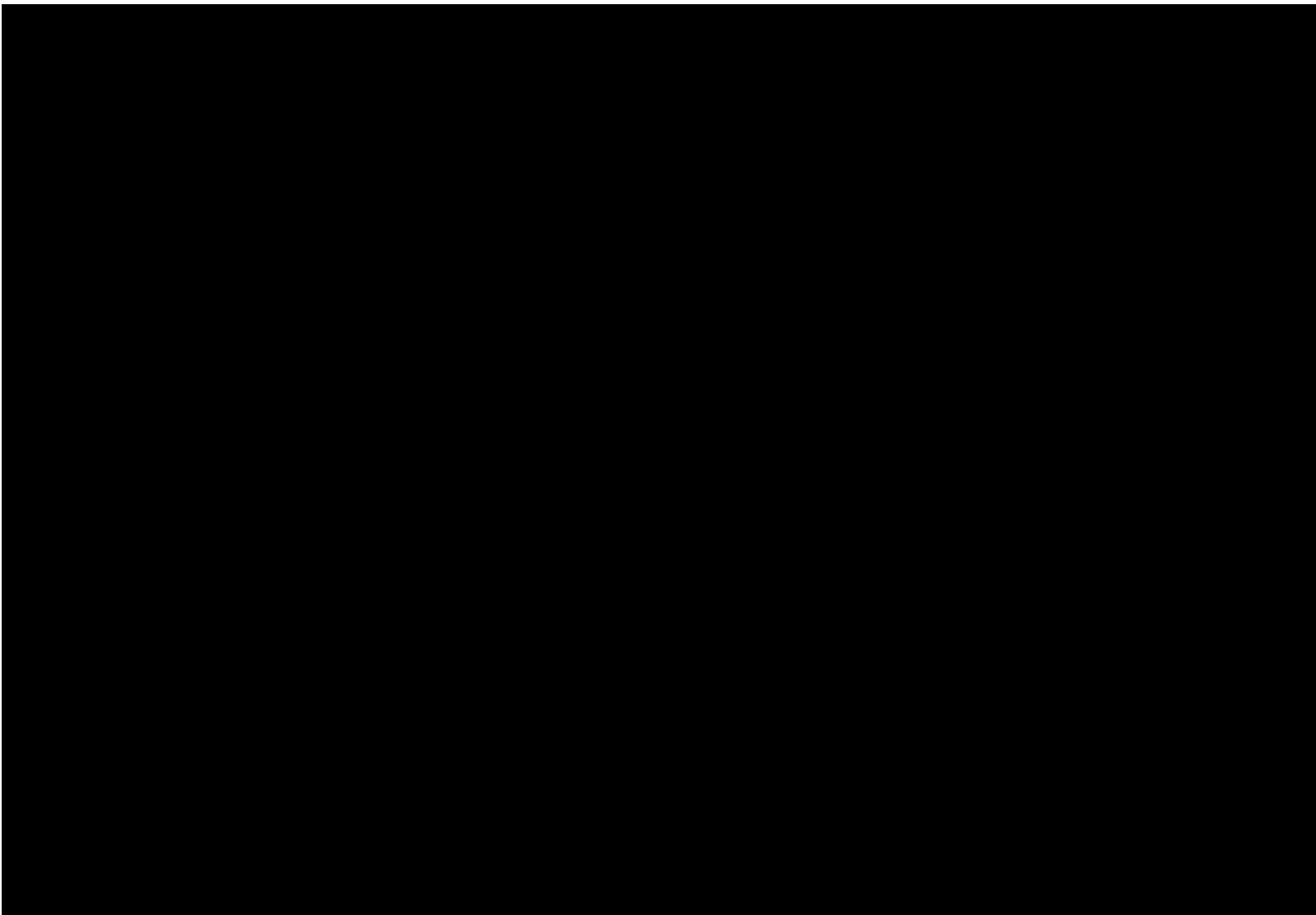
Evanston, IL 60201

katie.freeman@hagertyconsulting.com

847-492-8454 x119





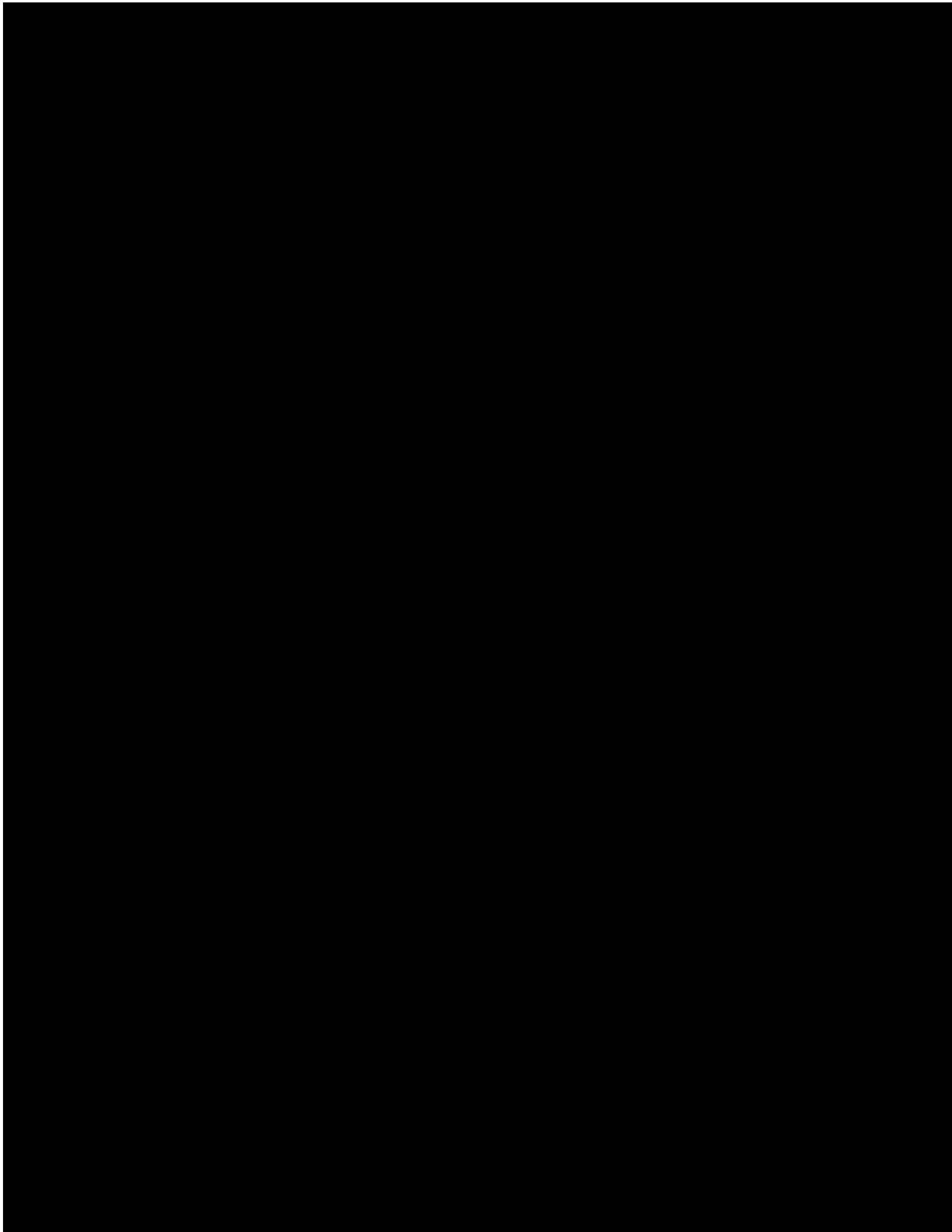


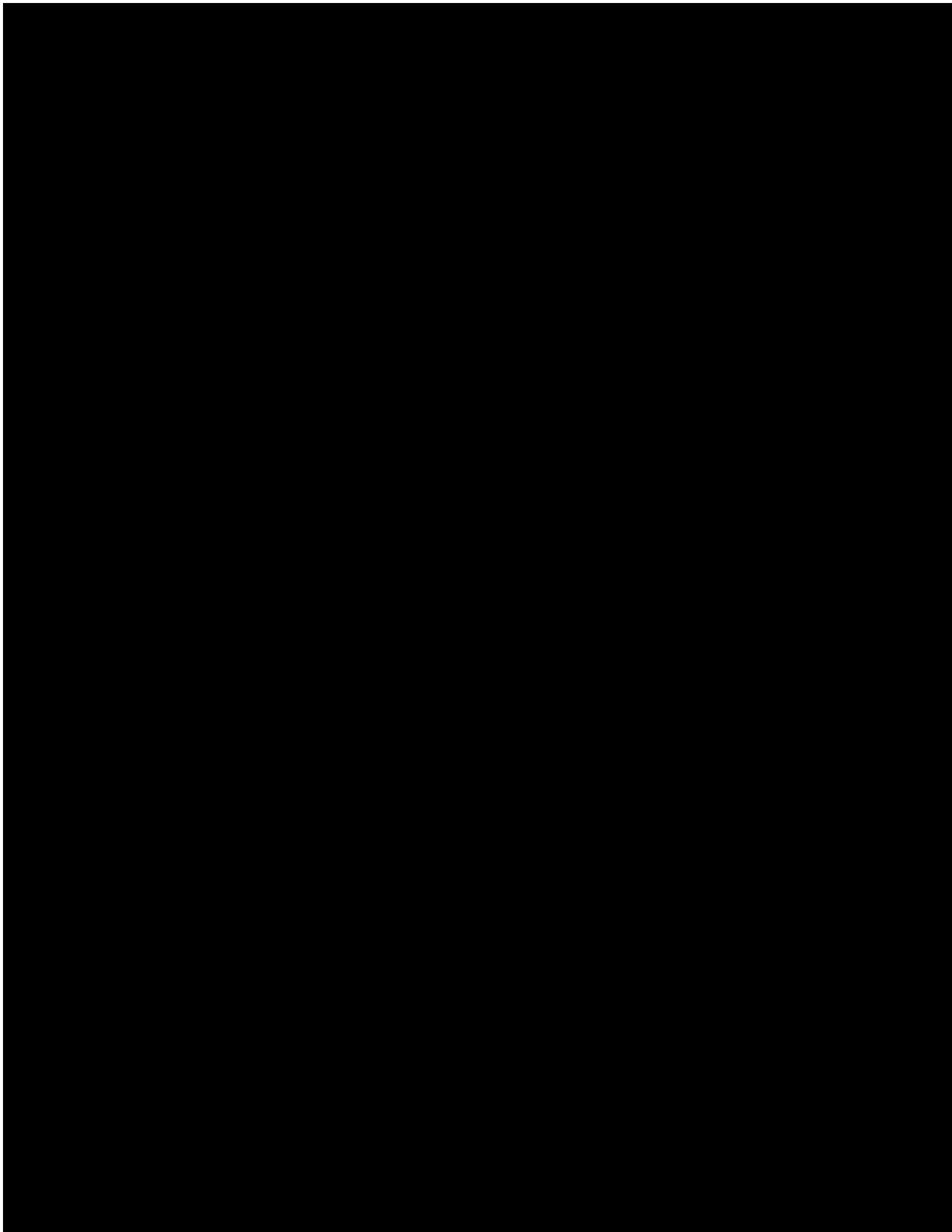
The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every receipt, invoice, and bill should be properly filed and indexed for easy retrieval. This not only helps in tracking expenses but also ensures compliance with tax regulations.

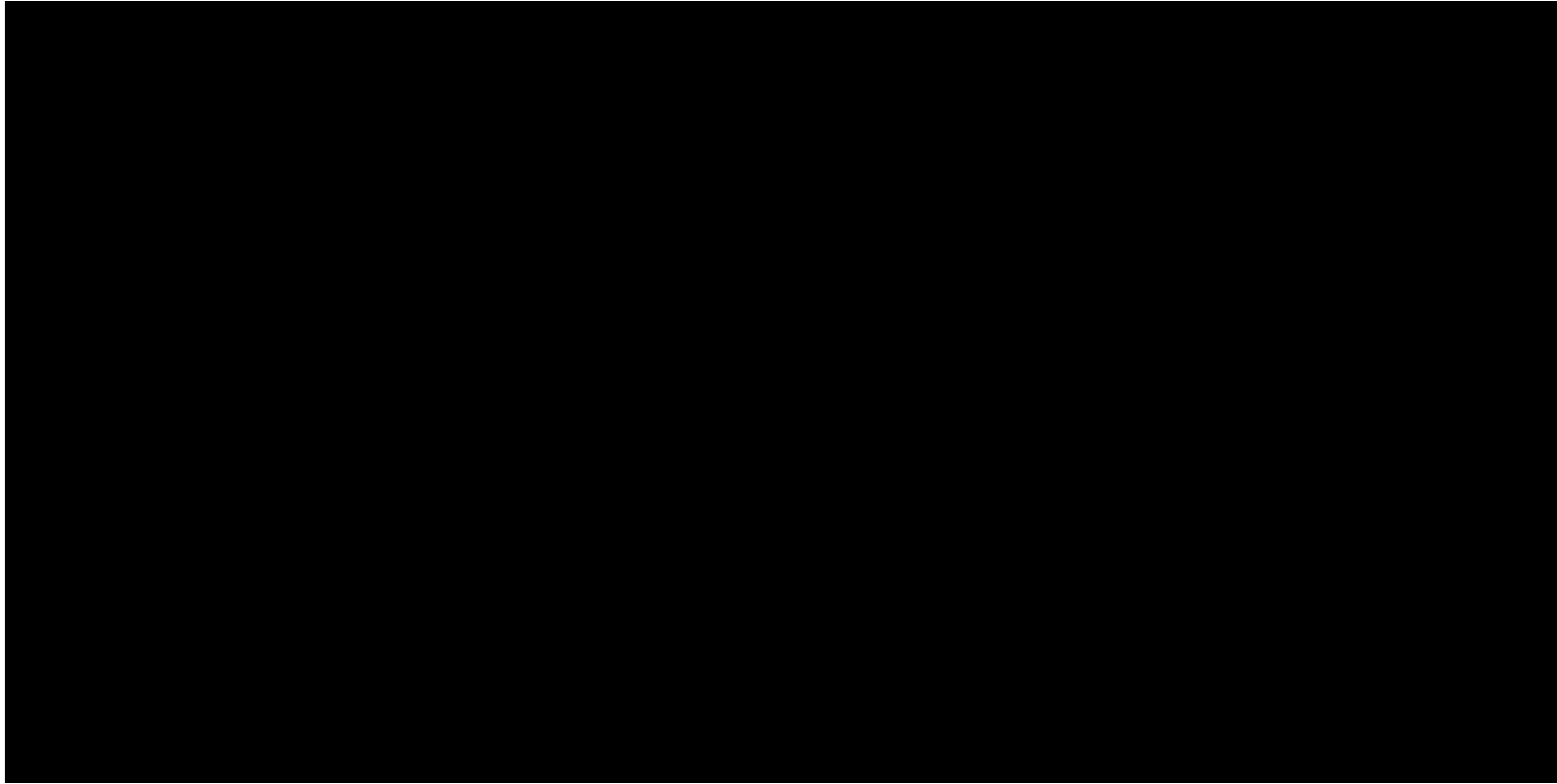
Next, the document outlines the process of reconciling bank statements. It advises comparing the bank's records with the company's internal accounting records to identify any discrepancies. Regular reconciliation is crucial for detecting errors and preventing fraud.

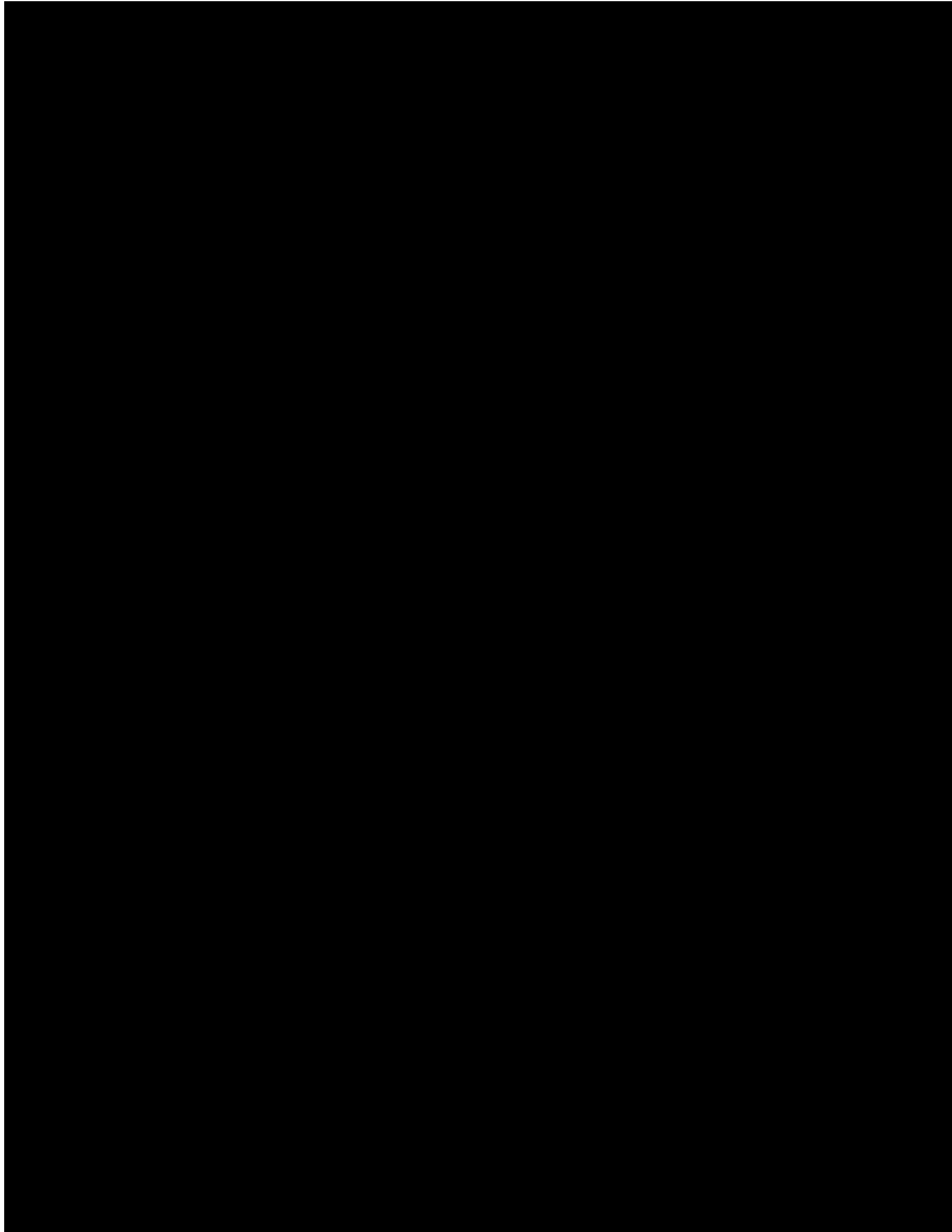
The following section covers the preparation of financial statements. It details the steps involved in calculating net income, preparing the balance sheet, and generating the cash flow statement. Each statement provides a different perspective on the company's financial health.

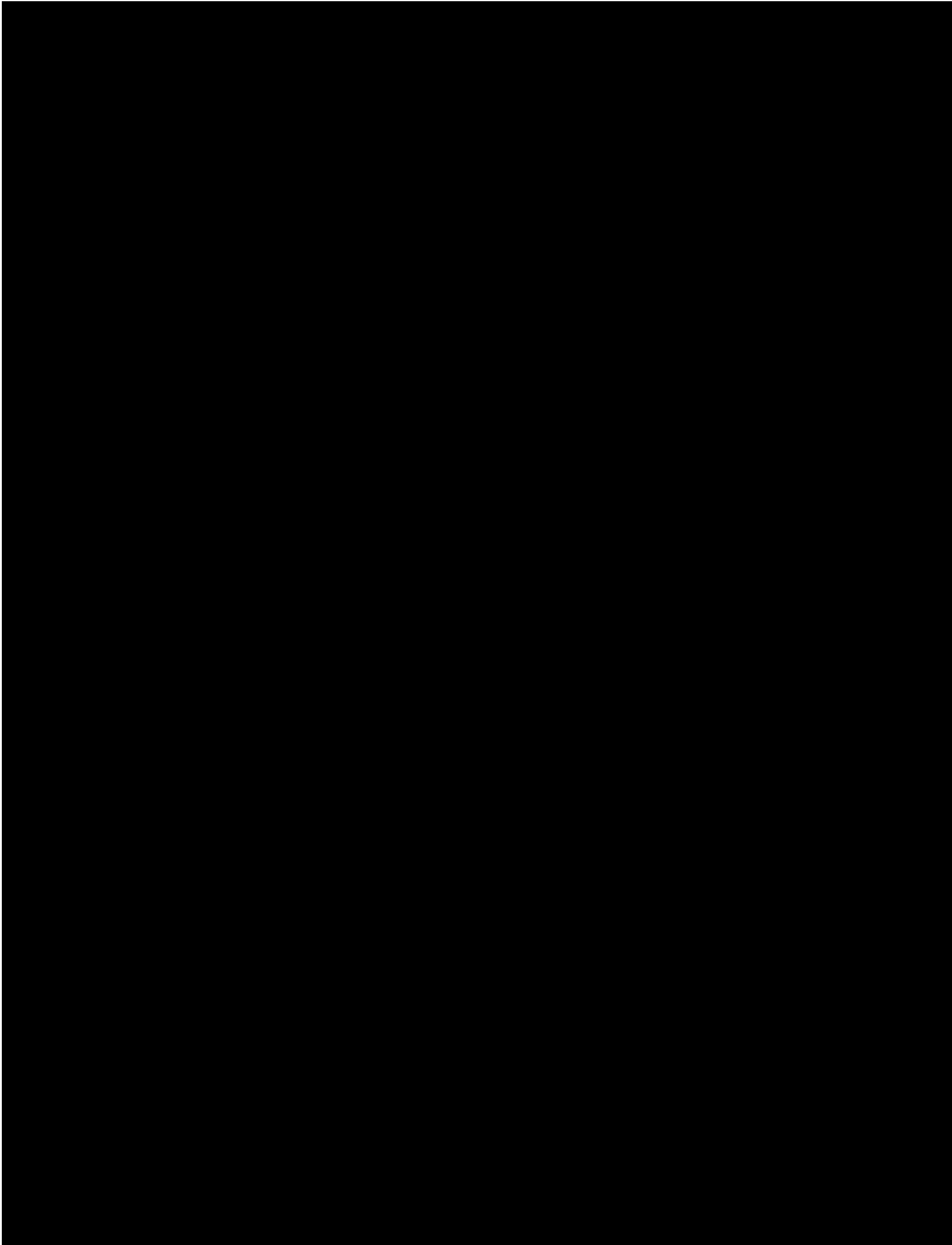
Finally, the document discusses the importance of budgeting and forecasting. It suggests setting realistic financial goals and creating a budget to guide the company's operations. Regularly reviewing and adjusting the budget is essential for staying on track and achieving long-term success.

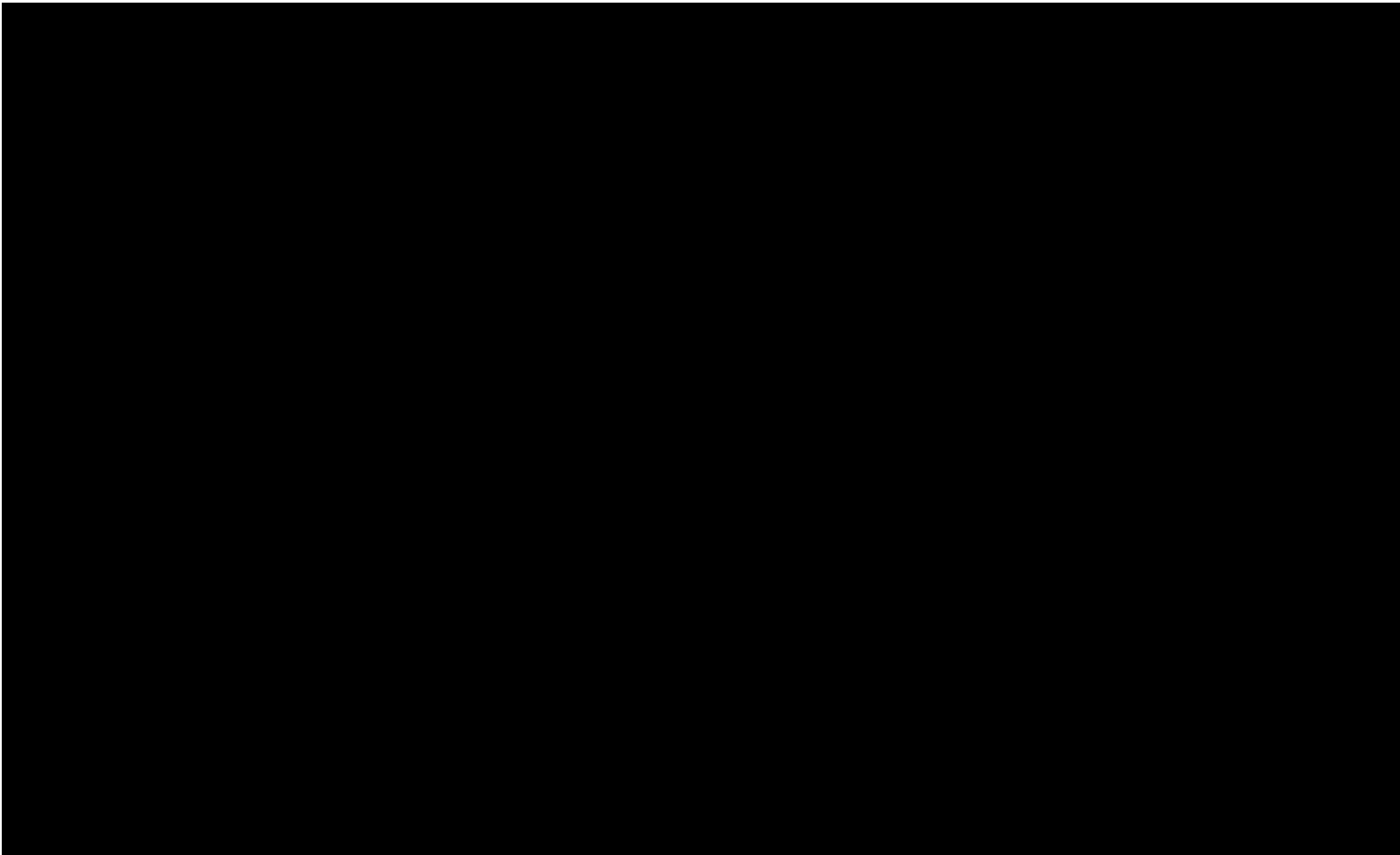


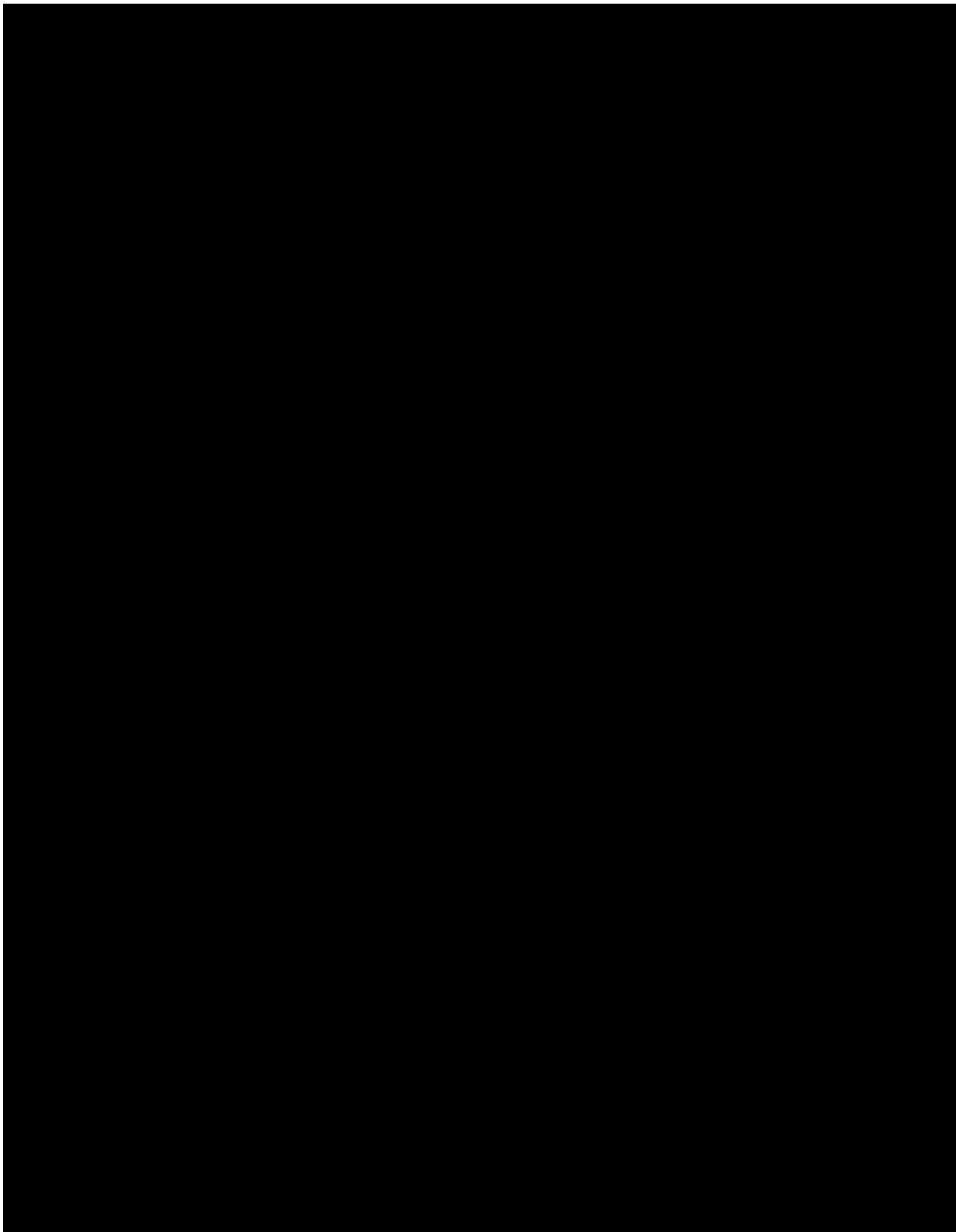


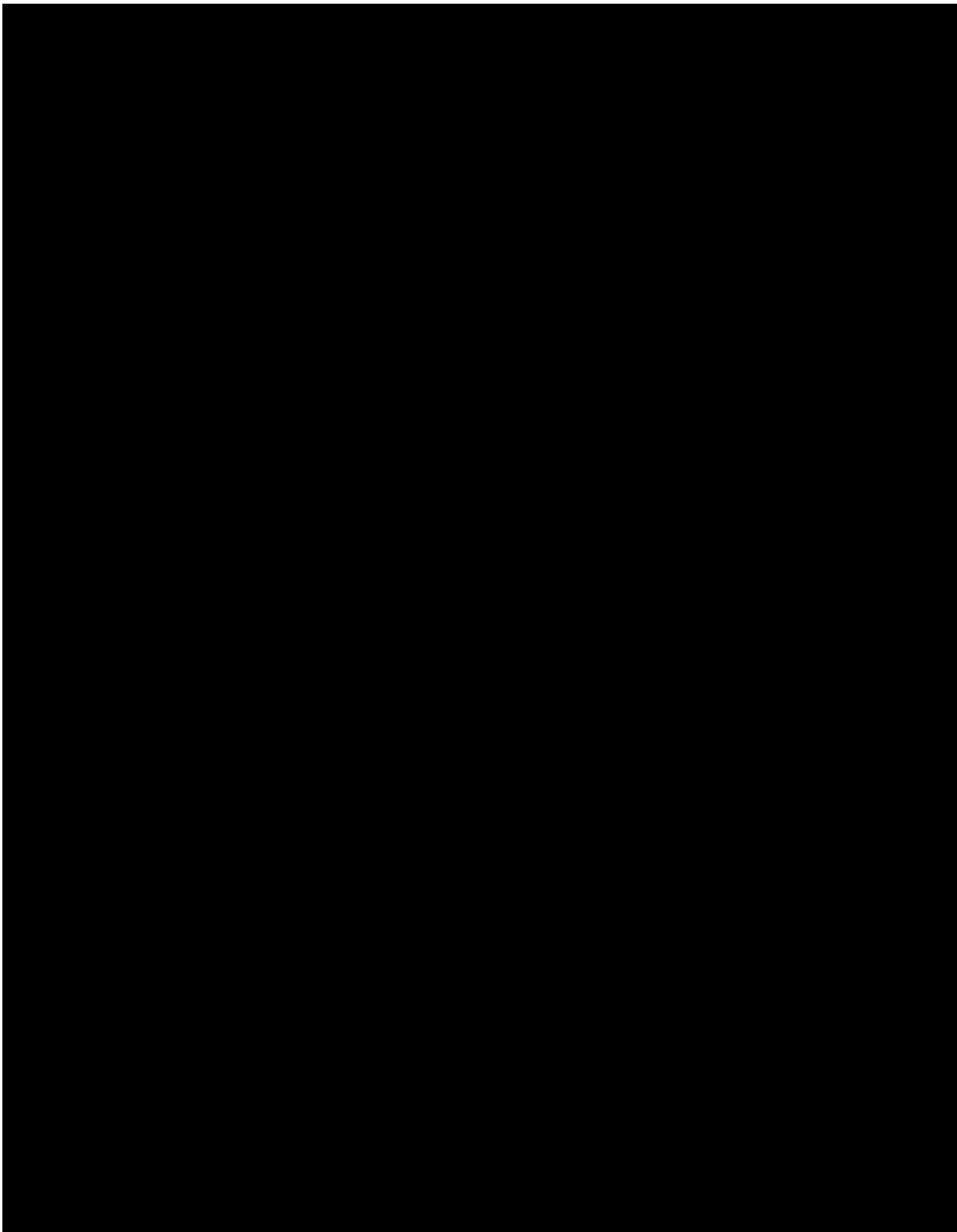


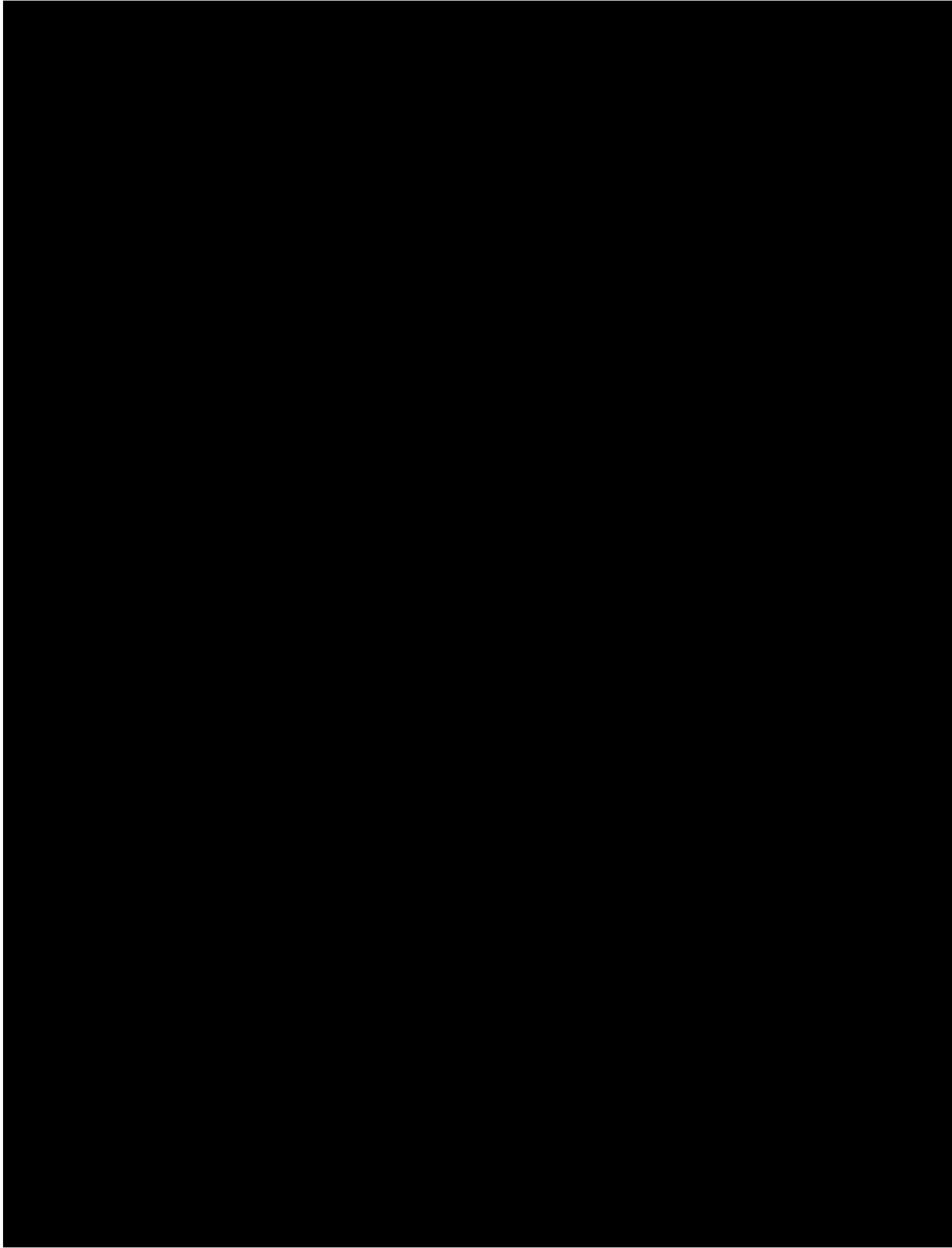




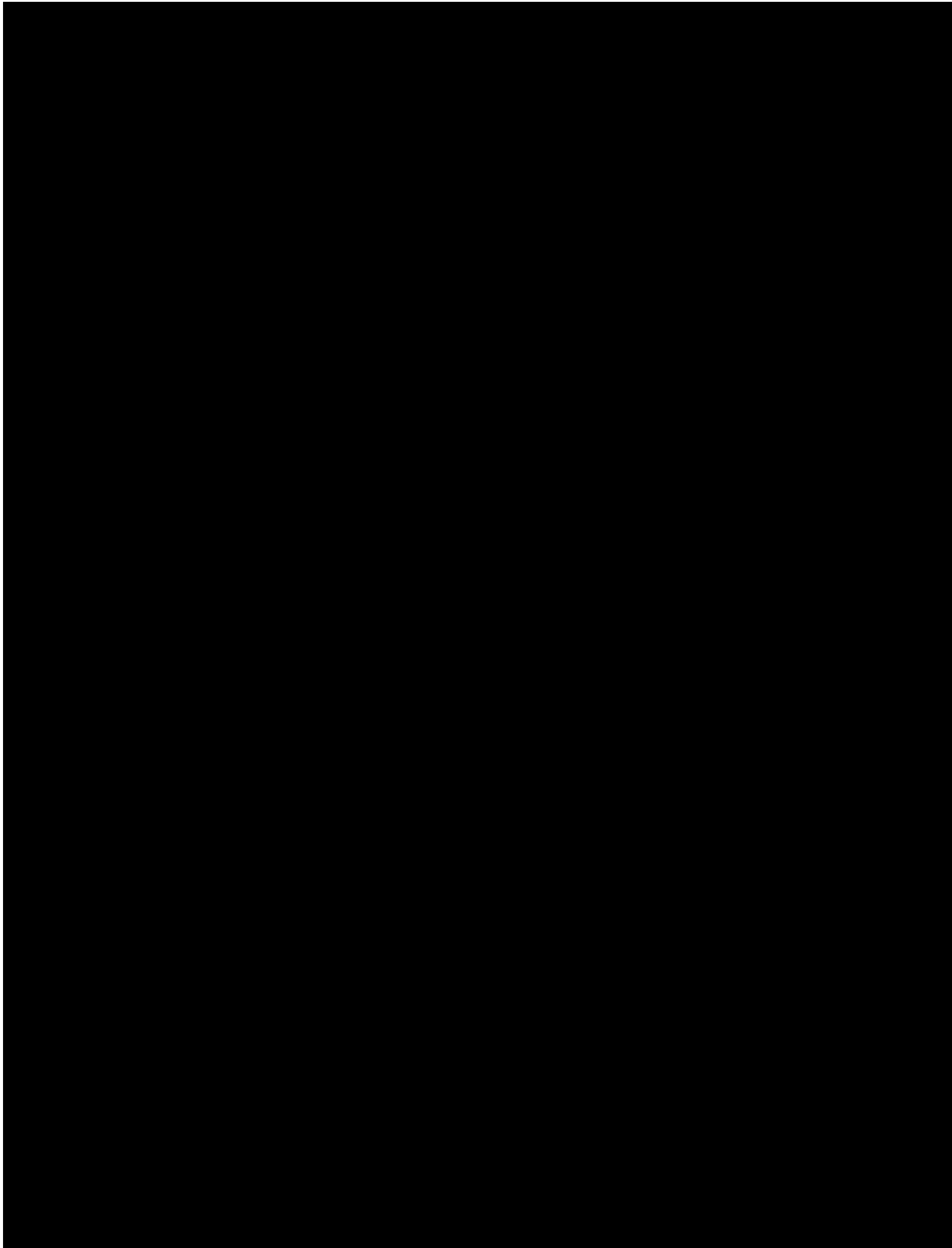


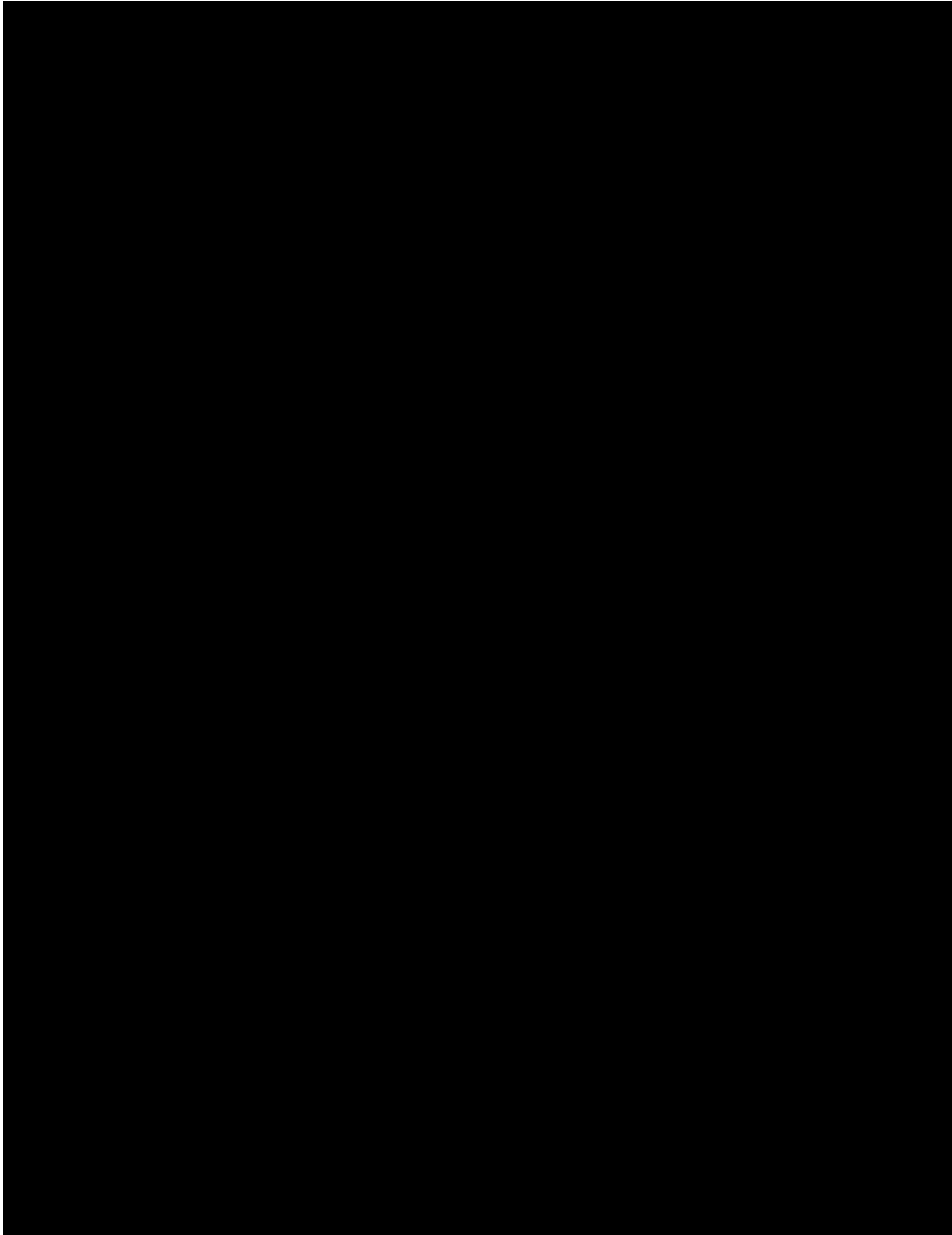


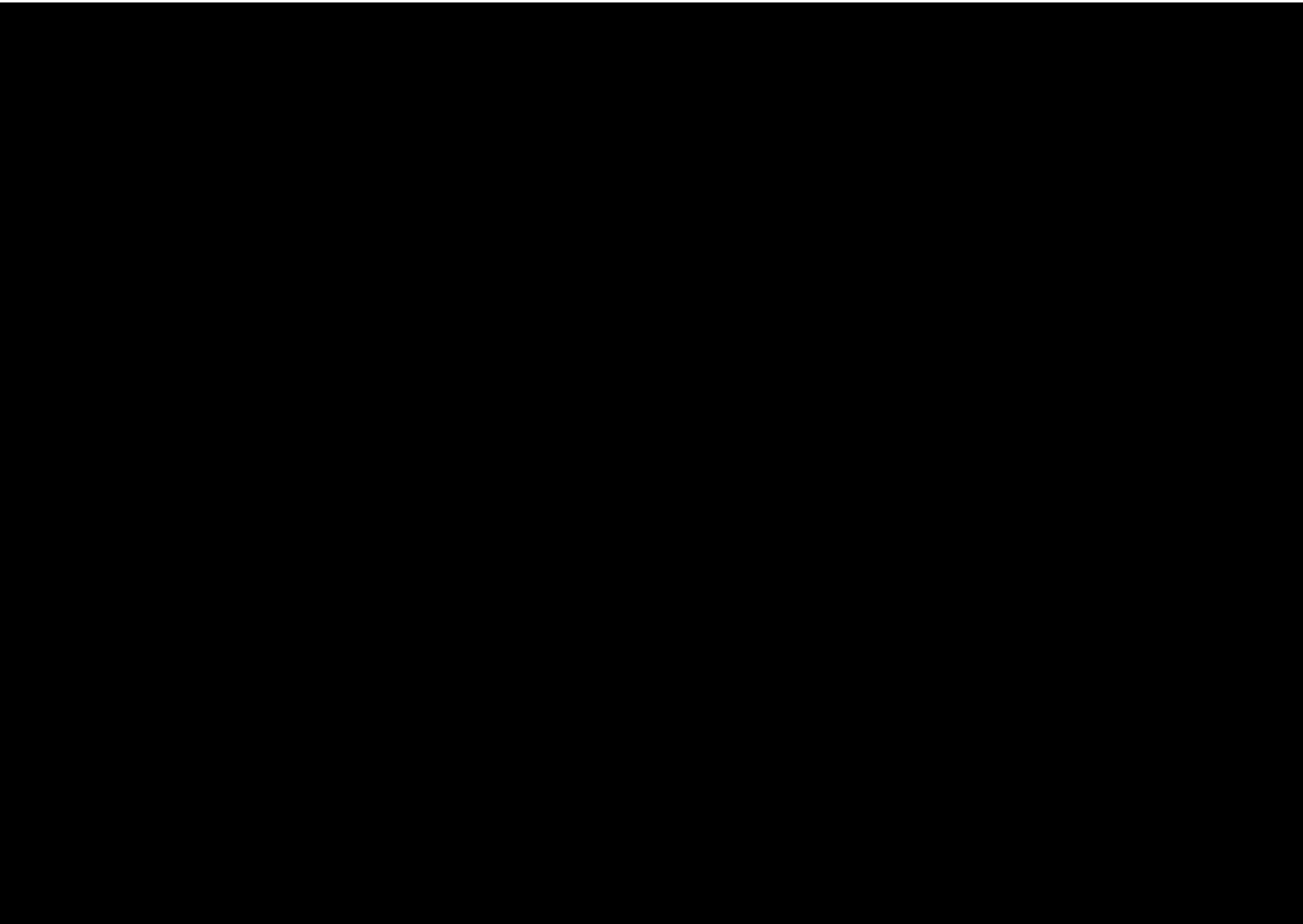












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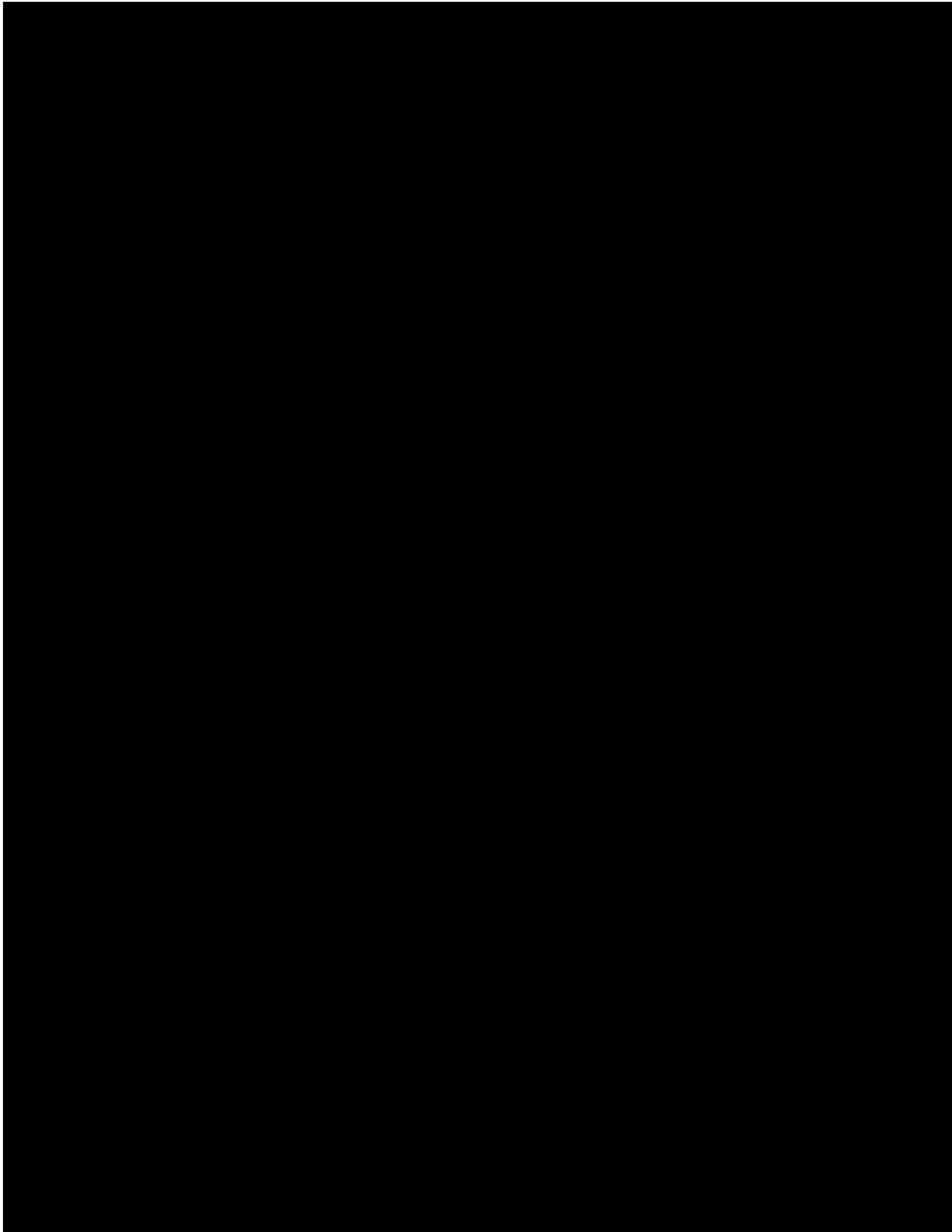
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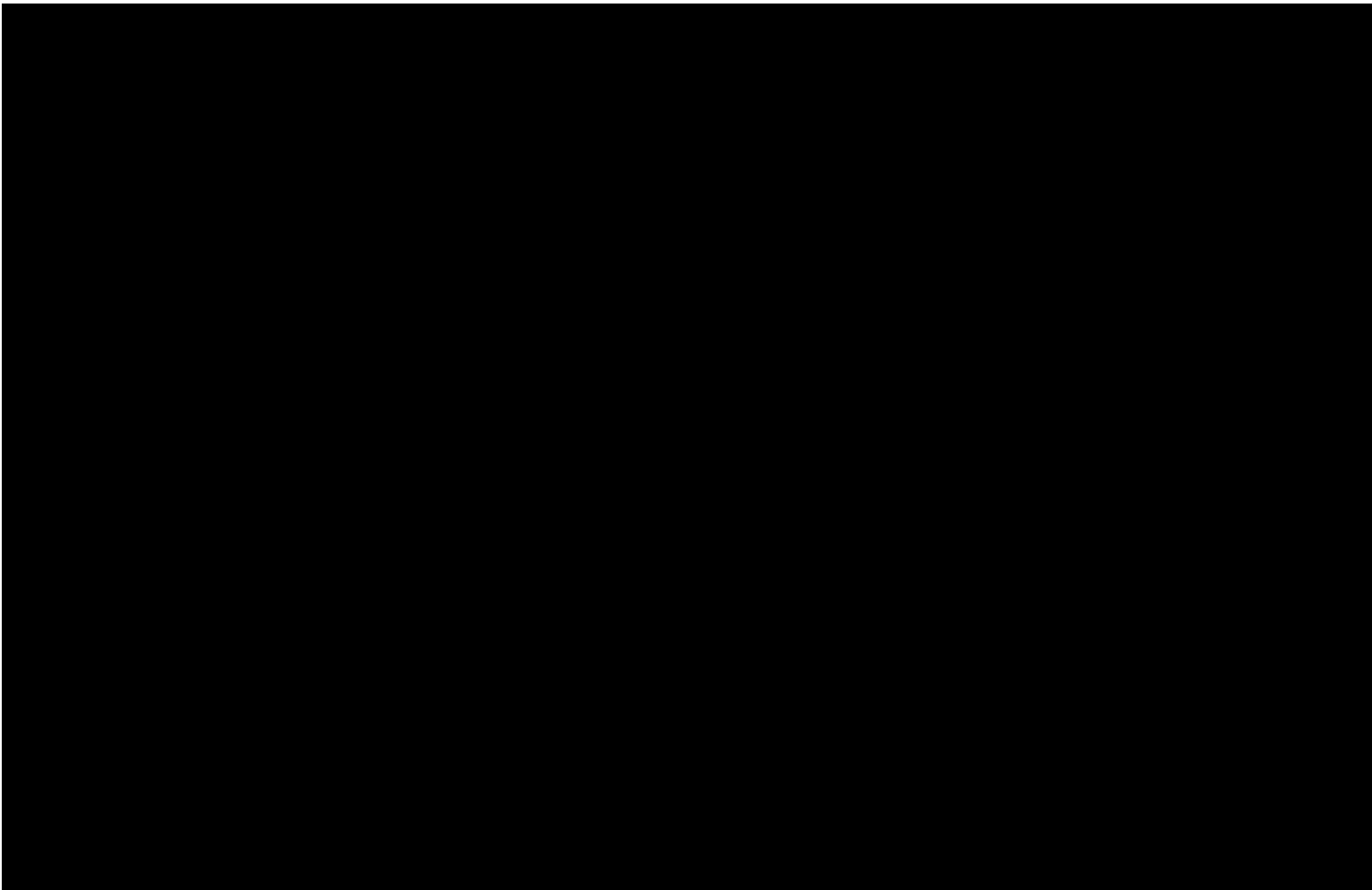
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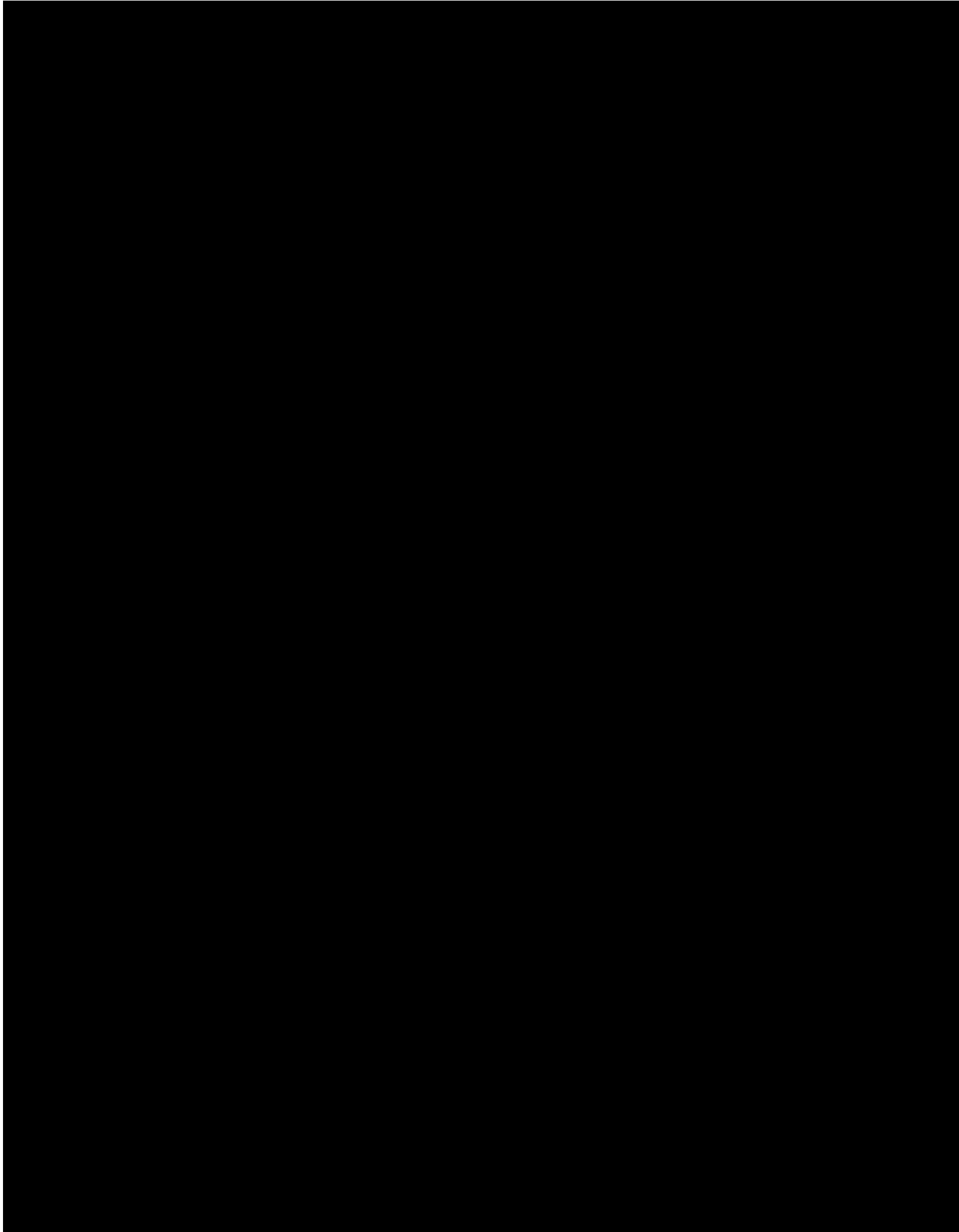
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Attachment A: Task Order Categories/Pricing

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

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

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

PRICING:

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

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 1 – Development of Policies, Procedures, and Standard Operating Procedures (SOPs)			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 4 – Procurement Compliance and Monitoring			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 6 – Action Plan Development and Amendments			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
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>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 12 – Training, Technical Assistance, and Capacity Building			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 14 – Communication, Public Information, and Outreach Support			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 15 – Grant Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			
CDBG-DR Project Executive	\$255	\$263	\$271
CDBG-DR Subject Matter Expert	\$205	\$211	\$217
CDBG-DR Project Manager	\$195	\$201	\$207
CDBG-DR Grant Consultant IV	\$190	\$196	\$202
CDBG-DR Senior Financial Management Specialist II	\$185	\$191	\$196
CDBG-DR Grant Consultant III	\$170	\$175	\$180
CDBG-DR Grant Consultant II	\$155	\$160	\$164
CDBG-DR Senior Financial Management Specialist	\$150	\$154	\$159
CDBG-DR Senior Grants Management Specialist	\$140	\$144	\$149
CDBG-DR Grants Management Specialist	\$125	\$129	\$133
CDBG-DR Financial Management Specialist	\$120	\$124	\$127
CDBG-DR Grant Consultant I	\$115	\$119	\$122
CDBG-DR Analyst	\$100	\$103	\$106
CDBG-DR Senior Administrator	\$82	\$84	\$86
CDBG-DR Administrative Assistant	\$65	\$66	\$68
TASK 16 – Technical Systems Specification & Project Management			
<i>Vendor to Indicate All Position Title(s) HERE</i>			

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 17 – Environmental Review*	UNIT COST	UNIT COST	UNIT COST
Initial Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			
Reevaluation Environmental Review:			
Exempt			
Categorically Excluded Not Subject to §58.5			
Categorically Excluded Subject to §58.5			
Environmental Assessment			
Environmental Impact Statements			

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

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

Attachment D: Location of Workers Utilized by the Vendor

Attachment E: HUB Supplemental Vendor Information

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

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

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, Hagerty Consulting, Inc., 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

Katie Freeman, Director of Operations
Name and Title of Vendor's Authorized Official

September 10, 2025
Date

Signed Attachment G: Disclosure of Lobbying Activities (OMB Standard Form LLL)

DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

0348-0046

(See reverse for public burden disclosure.)

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. Report Type: <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____
4. Name and Address of Reporting Entity: <input checked="" type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, <i>if known</i> Hagerty Consulting, Inc. 1618 Orrington Ave, Suite 201 Evanston, IL 60201 Congressional District, if known:	5. If Reporting Entity In No. 4 Is a Subawardee, Enter Name and Address of Prime: Congressional District, if known:	
6. Federal Department/Agency: US Department of Housing and Urban Develop:	7. Federal Program Name/Description: CDBG-DR CFDA Number, <i>if applicable</i> : _____	
8. Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i> N/A	b. Individuals Performing Services <i>(including address if different from No. 10a)</i> <i>(last name, first name, MI):</i> N/A	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature: _____ Print Name: <u>Katie Freeman</u> Title: <u>Director of Operations</u> Telephone No.: <u>847-492-8454</u> Date: <u>09/10/202</u>	
Federal Use Only:		Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)



INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

Redacted Version of the Proposal

In accordance with Section 2.6, a redacted version of the proposal has been provided separately.

List of Errata and Exceptions

In alignment with Section 2.3, Hagerty has no exceptions to the proposed draft contract.