

Contract Award

Contract Number:	Doc1677946894
Contract Description:	Staff Augmentation
Vendor:	Indelible Management Solutions

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 8 – Program Performance Monitoring and Evaluation

TASK 10 – Audit Readiness and Monitoring Support

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

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:		
Indelible Management Solution Inc.		
STREET ADDRESS:		P.O. BOX: 27703
4819 Emperor Boulevard, Suite 400		
CITY & STATE & ZIP:		TELEPHONE NUMBER: (904) 647-4667
Durham, North Carolina		TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
3800 Esplanade Way, Suite 210 Tallahassee, FL 32311		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:		FAX NUMBER:
Michael White, Chief Business Development Officer		
VENDOR'S AUTHORIZED SIGNATURE:	DATE: 9/4/2025	EMAIL: mwhite@indelible-solutions.com

Proposal Number: Doc1677946894

Vendor: Indelible Management Solution 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.

FOR STATE USE ONLY: Offer accepted and Contract awarded this 19th day of December, 2025, as indicated on the attached

Signed by: _____ certification, by _____ (Authorized Representative of Department of Commerce).



NC DEPARTMENT
of COMMERCE

CONNECTING NORTH CAROLINIA

GOVERNOR

SECRETARY

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): Indelible Management Solutions, Inc.

Authorized Signature:

Name and Title: Michael D. White, II

Date: December 07, 2025

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

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

- YES NO TASK 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:

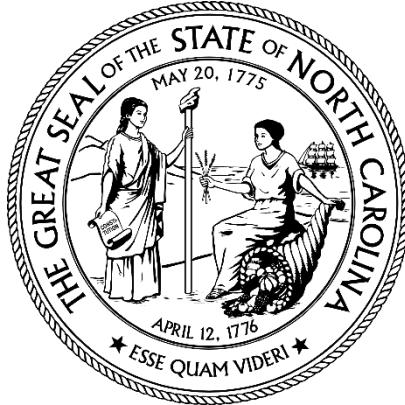
Vendor to replicate the table below and provide an hourly not-to-exceed rate per position for each task order category(s) offered with its solicitation response. Rates shall be inclusive of salary, overhead, administrative and other similar fees, travel and other expenses. Vendor is responsible for providing 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>Policy & Compliance Analyst</i>	\$125.00	\$130.00	\$136.00
<i>Technical Writer</i>	\$165.00	\$172.00	\$179.00
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Internal Auditor</i>	\$150.00	\$156.00	\$163.00
<i>Financial Compliance Specialist</i>	\$130.00	\$135.20	\$141.00
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>DOB Compliance Officer</i>	\$150.00	\$156.00	\$163.00
<i>Financial Compliance Specialist</i>	\$130.00	\$135.20	\$141.00
TASK 4 – Procurement Compliance and Monitoring			
<i>Procurement Specialist</i>	\$143.00	\$149.00	\$155.00
<i>Policy & Compliance Analyst</i>	\$172.00	\$179.00	\$186.00
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Case Manager Lead</i>	\$135.00	\$141.00	\$146.00
<i>Appeals Review Specialist</i>	\$130.00	\$136.00	\$141.00
TASK 6 – Action Plan Development and Amendments			
<i>CDBG-DR SME Specialist</i>	\$250.00	\$260.00	\$270.00
<i>Program Planner</i>	\$195.00	\$203.00	\$211.00
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Performance Evaluation Analyst</i>	\$130.00	\$136.00	\$141.00
<i>Data & Reporting Specialist</i>	\$125.00	\$130.00	\$136.00
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
TASK 10 – Audit Readiness and Monitoring Support			
<i>Internal Auditor</i>	\$150.00	\$156.00	\$163.00
<i>Data & Documentation Specialist</i>	\$125.00	\$130.00	\$136.00
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 12 – Training, Technical Assistance, and Capacity Building			
Training Program Coordinator	\$175.00	\$182.00	\$189.28
Technical Writer	\$165.00	\$172.00	\$179.00
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
Relocation Programs Manager	\$205.00	\$214.00	\$222.00
Relocation Compliance Lead	\$165.00	\$172.00	\$179.00
TASK 14 – Communication, Public Information, and Outreach Support			
Public Information Officer	\$225.00	\$234.00	\$244.00
Communications Specialist - Technical Writer	\$165.00	\$172.00	\$179.00
TASK 15 – Grant Management			
Grant Manager	\$145.00	\$151.00	\$157.00
CDBG-DR SME Specialist	\$205.00	\$214.00	\$222.00
TASK 16 – Technical Systems Specification & Project Management			
Project Manager	\$205.00	\$214.00	\$222.00
Data and Reporting Specialist	\$125.00	\$130.00	\$136.00
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



**STATE OF NORTH CAROLINA
DEPARTMENT OF COMMERCE**

Division of Community Revitalization

Request for Proposals #: Doc1677946894

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

Date of Issue: August 11, 2025

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

Direct all inquiries concerning this RFP to:

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

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1.0 PURPOSE AND BACKGROUND – AGENCY SPECIFIC TERM CONTRACT

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

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

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

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

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

1.1 CONTRACT TERM

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

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

2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSALS AND TASK ORDERS

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

2.2 ePROCUREMENT FEE

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

2.3 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

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

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

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

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

2.4 RFP SCHEDULE

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

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

2.5 RFP QUESTIONS

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

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

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

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

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

2.6 RFP SUBMITTAL

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

Offers to be submitted through eProcurement Sourcing. For training on how to use eProcurement Sourcing, <https://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>			
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 3 – Duplication of Benefits (DOB) Compliance <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 4 – Procurement Compliance and Monitoring <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 5 – Claims, Appeals, and Case Reviews <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 6 – Action Plan Development and Amendments <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 8 – Program Performance Monitoring and Evaluation <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 10 – Audit Readiness and Monitoring Support <i>Vendor to Indicate All Position Title(s) HERE</i>			
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects <i>Vendor to Indicate All Position Title(s) HERE</i>			

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

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

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

ATTACHMENT B: NORTH CAROLINA INSTRUCTIONS TO VENDORS

I. READ, REVIEW AND COMPLY

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

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

II. REQUEST FOR OFFERS

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

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

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

III. DUTY TO INQUIRE

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

IV. DEFINITIONS, ACRONYMS AND ABBREVIATIONS

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

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

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

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

V. INTERPRETATION OF TERMS AND PHRASES

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

VI. BID SUBMISSION

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

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

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

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

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

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

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

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

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

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

8. **CONTENTS OF OFFER:**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2. DEFAULT AND TERMINATION.

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

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

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

3. INTERPRETATION, CONFLICT OF TERMS.

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

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

- f) In the event of conflict of terms between applicable provisions of the Federal Funds Provisions and the other provisions of these North Carolina General Contract Terms and Conditions, the more restrictive provision will govern.
- 4. GOVERNMENTAL RESTRICTIONS:** In the event any Governmental restrictions are imposed which necessitate alteration of the goods, material, quality, workmanship, or performance of the Services offered, prior to acceptance, it shall be the responsibility of the Vendor to notify the State Contract Lead or Administrator indicated in the Contract at once, in writing, indicating the specific regulation which requires such alterations. The State reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the Contract.
- 5. AVAILABILITY OF FUNDS:** Any and all payments to the Vendor shall be dependent upon and subject to the availability of funds appropriated or allocated to the agency for the purpose set forth in the Contract, including the availability of federal funds intended for the purpose set forth in the Contract.
- 6. TAXES:** Any applicable taxes shall be invoiced as a separate item.
- a) G.S. 143-59.1 bars the Secretary of Administration from entering into Contracts with Vendors if the Vendor or its affiliates meet one of the conditions of G.S. 105-164.8(b) and refuses to collect use tax on sales of tangible personal property to purchasers in North Carolina. Conditions under G.S. 105-164.8(b) include: (1) Maintenance of a retail establishment or office, (2) Presence of representatives in the State that solicit sales or transact business on behalf of the Vendor and (3) Systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. By execution of the proposal document the Vendor certifies that it and all of its affiliates, (if it has affiliates), collect(s) the appropriate taxes.
 - b) The agency(ies) participating in the Contract are exempt from Federal Taxes, such as excise and transportation. Exemption forms submitted by the Vendor will be executed and returned by the using agency.
 - c) Prices offered are not to include any personal property taxes, nor any sales or use tax (or fees) unless required by the North Carolina Department of Revenue.
- 7. SITUS AND GOVERNING LAWS:**
- a) This Contract is made under and shall be governed by and construed in accordance with the laws of the State of North Carolina, including, without limitation, the relevant provisions of G.S. Chapter 143, Article 3, and the Rules in 01 NCAC Chapter 05, and any applicable successor provisions, without regard to its conflict of laws rules, and within which State all matters, whether sounding in Contract, tort or otherwise, relating to its validity, construction, interpretation and enforcement shall be determined. G.S. 22B-3.
 - b) Vendor shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business and its performance in accordance with the Contract, including those of federal, state, and local agencies having jurisdiction and/or authority, and including, without limitation, the applicable requirements in the Federal Funds Provisions, below.
 - c) Non-resident Vendor corporations not formed under NC law must be domesticated in the Office of the NC Secretary of State in order to contract with the State of North Carolina. G.S. 55A-15-01.
- 8. NON-DISCRIMINATION COMPLIANCE:**
- a) The Vendor will take affirmative action in complying with all State requirements and laws concerning fair employment and employment of people with disabilities, and concerning the treatment of all employees

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

- b) Federal Law, such as the following, applies as provided for therein: Titles VI and VII of the Civil Rights Act of 1964 (PL 88-352), and the regulations issued pursuant thereto (prohibiting discrimination on the basis of 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 Disabilities 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 YES NO **performing services under the Contract outside of the United States**

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:

ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION

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

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

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

a) Is Vendor a Historically Underutilized Business? Yes No

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

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

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

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

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

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

Signature of Vendor's Authorized Official

Name and Title of Vendor's Authorized Official

Date

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

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

ATTACHMENT H: EXPERIENCE

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

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

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

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

OFFER CHECKLIST

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

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

Offer Checklist:

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

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

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

North Carolina Roadmap to Recovery

RFP No. Doc1677946894

**Staff Augmentation - Community Development Block
Grant - Disaster Recovery**

Proposal to Serve the North Carolina Department of Commerce, Division of
Community Revitalization

Indelible Management Solutions, Inc.
4819 Emperor Boulevard
Suite 400
Durham, North Carolina
9/11/2025

Indelible Management Solution, Inc. affirms that neither the company nor its key personnel have any actual or potential conflicts of interest related to this engagement. Should any arise during the contract term, we will promptly disclose and address them with the appropriate authorities.



09/11/2025

Re: Response to RFP No. Doc 1677946894 – Staff Augmentation for CDBG-DR Expert Administrative Support

Indelible Management Solutions Inc., is pleased to submit our proposal in response to RFP No. Doc1677946894 issued by the North Carolina Department of Commerce, Division of Community Revitalization (DCR).

Founded in 2018, Indelible is a minority-owned firm with over 150 professionals nationwide specializing in disaster recovery, grants management, public assistance, and stakeholder outreach. As a trusted partner to state and local governments, Indelible brings deep expertise in Community Development Block Grant – Disaster Recovery (CDBG-DR) program management, compliance, and implementation. Our team has successfully supported recovery efforts across the Southeast, including managing statewide CDBG-DR programs for Florida Commerce following Hurricanes Michael, Ian, and Irma, as well as providing case management, outreach, and compliance support for Alabama’s CDBG-DR programs after Hurricanes Sally and Zeta.

The Indelible Touch:

- ❖ Deep expertise in CDBG-DR, FEMA, HUD, DOT, and other federal recovery programs
- ❖ Proven compliance expertise in financial oversight, duplication of benefits, procurement monitoring, and audit readiness.
- ❖ Scalable resources to meet surge demands.
- ❖ Tailored technical, analytical, and stakeholder engagement strategies.
- ❖ Strong program management systems ensure accountability, transparency, and timely execution of task orders.
- ❖ Commitment to diversity and equity, aligning with North Carolina’s goals for Historically Underutilized Businesses (HUBs).

With a focus on accuracy, speed, and integrity, Indelible is well positioned to provide the expert administrative support needed to implement recovery programs under DCR’s Hurricane Helene initiatives.

We appreciate the opportunity to submit our proposal and look forward to the possibility of working together. For any questions, please contact our President of Emergency Management, Drew Winters, at dwinters@indelible-solutions.com or (850) 321-5168.

Very Truly Yours,



Michael D. White II

Co-founder, Chief Business Development Officer
Indelible Solutions

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Firm Qualifications and Approach

Company Background

Indelible has earned a strong reputation as a trusted provider of disaster recovery, emergency management, strategic consulting, regulatory compliance, grant administration, and community centered solutions. Since inception, our mission has been to support public and private sector clients across the country in addressing complex challenges by delivering technical expertise, personalized assistance, and a compassionate, culturally aware approach.

Indelible is proud to be among the fastest-growing firms in its industry, with a dynamic team of full time dedicated professionals. Indelible draws on the strength of a multidisciplinary team of subject matter experts with direct experience in:

- Disaster response and recovery operations
- Federal grants management and compliance
- Program and project management
- FEMA Public Assistance and HUD CDBG-DR programs
- Risk and Hazard Mitigation

Compassion at the Heart of Recovery

Recovery begins with understanding and respect for those impacted. By placing survivors at the center, we ensure they feel supported and empowered. In a city as diverse as Los Angeles, our multilingual and culturally aware teams break barriers, build trust, and foster collaboration to help communities rebuild stronger with a focus on preserving each community's fabric

Leading the Way in Recovery

We lead recovery efforts with unmatched expertise and swift action. Our team delivers tailored solutions, from managing disaster response centers to navigating complex grant processes. With proven strategies and a focus on results, we ensure communities receive the support they need to rebuild quickly and effectively

Partnering for Long-Term Recovery

Long-term recovery is built through strong partnerships. By collaborating with local leaders, faith-based organizations, and community groups, we create solutions that address immediate needs while paving the way for lasting resilience. Together, we strengthen communities and empower them to thrive beyond the crisis



While our firm is based in Florida, our operational footprint is national, and we are fully prepared to bring our capabilities to North Carolina communities in need. We understand the devastating and long-lasting effects of hurricanes, flooding, and other disasters on families and local economies. That perspective has shaped our approach, one grounded in empathy, cultural competence, and an unwavering commitment to delivering personalized and effective support for every individual and household we serve.

To meet urgent demands and maintain surge capacity, Indelible leverages a robust network of thoroughly pre-vetted subcontractors enabling us to rapidly scale and mobilize hundreds of additional professionals when needed. This flexibility ensures that we can meet client needs in high-pressure, time-sensitive environments. Our clients turn to Team Indelible because of our proven ability to design, develop, and implement customized disaster recovery solutions. Whether we are supporting Emergency Operations Centers, staffing emergency shelters, administering complex grant programs, or coordinating holistic case management services, we bring a strategic, mission-driven approach that ensures quality, efficiency and survivor-centered outcomes. We do more than deliver services; we build partnerships that strengthen communities, safeguard critical assets, and accelerate recovery when it matters most.

Meet The Team

Indelible has assembled a team purpose built to support North Carolina's Division of Community Revitalization (DCR) in delivering rapid, compliant, and transparent CDBG-DR recovery programs. By combining Indelible's deep expertise in disaster recovery program management and compliance with APCO Worldwide's unmatched communications and stakeholder engagement capabilities, we offer the State of North Carolina a partnership that blends proven technical delivery with local communications impact.



Together, Indelible and APCO provide a seamless balance of program integrity and public trust. Indelible brings a decade of experience managing federally funded disaster recovery programs across Florida, Texas, North Carolina, and beyond overseeing billions in CDBG-DR, FEMA PA, and HUD Mitigation dollars. In collaboration with APCO's nearly 40 years of strategic communications leadership, including more than 17 years serving North Carolina agencies; this partnership ensures that every aspect of recovery is delivered at the highest standard. Across the 39 counties impacted by Hurricane Helene, from case management, compliance monitoring, and grant oversight to transparent communication, proactive outreach, and stakeholder engagement – We are the team for you!

APCO Worldwide – Communications and Stakeholder Engagement Partner

Founded in 1984, APCO Worldwide is a global communications and public affairs firm with a strong North Carolina presence, anchored by a 50-person Raleigh office. APCO has supported



leading state agencies and institutions, including NCWorks, the North Carolina Community College System, the Department of Public Instruction, and the Department of Justice. Their team combines national depth with local insight, ensuring communications are accessible, relevant, and trusted by North Carolinians.

APCO's professionals specialize in government relations, message development, crisis response, public education campaigns, and stakeholder engagement. From helping families navigate college applications during Hurricane Helene disruptions to statewide awareness campaigns on sexual assault resources and consumer protection, APCO has delivered measurable results that reflect both urgency and precision. Their integrated approach, linking research, creative, media buying, and reporting will directly support DCR's need for clear, timely, and community-centered outreach.

Why This Partnership Works for North Carolina

- ❖ **Local presence with national reach:** Indelible's disaster recovery track record and APCO's North Carolina-based communications practice ensure DCR benefits from both subject-matter depth and community familiarity.
- ❖ **End-to-end support:** Indelible leads program compliance, monitoring, and grant management while APCO drives outreach, public information, and crisis communications under Task Category 14.
- ❖ **Proven results under pressure:** Both firms have supported disaster-impacted communities—Indelible through housing and grants management, APCO through communications campaigns that continued seamlessly during Hurricane Helene.
- ❖ **Scalable staff augmentation:** Together, we provide qualified professionals ready to deploy quickly to support DCR across short- and long-term assignments, ensuring flexibility and surge capacity.

Indelible and APCO are united in their commitment to helping North Carolina recover stronger, faster, and with full transparency. Our combined expertise equips DCR with both the technical precision and communications excellence needed to administer CDBG-DR funding responsibly and effectively.

Understanding the Impact of Disasters

Indelible is a trailblazer in disaster recovery. The Indelible team recognizes the profound impact disasters can have on communities, infrastructure, and the economies they sustain. We have extensive experience working with government entities at every level to help communities and agencies recover and rebuild. Our team is currently assisting with CDBG-DR engagements on Hurricane Michael, Hurricane Ian, and the completion of Hurricane Irma. Indelible's deep insight into HUD programs and community dynamics, guiding disaster recovery, mitigation, and resilience strategies goes beyond just at the state level. We have delivered outreach, case

management, and advisory services to devastated Counties and Community Agencies. Our teams are ready to deploy “boots on the ground” support to assist with strategic planning, compliance, and seamless multi-agency coordination of recovery operations. We ensure that recovery efforts meet regulatory standards while, restoring critical operations as quickly as possible.

Indelible’s History in Disaster Recovery

Indelible has a proven record of delivering large-scale, complex disaster response and recovery operations in highly dynamic environments. During the 2024 hurricane season—we deployed more than 3,500 personnel across 135+ locations in 50 counties, delivering mission-critical support. Our teams successfully operated Disaster Recovery Centers, Multi-Agency Resource Centers, and specialized assistance facilities, ensuring impacted populations received rapid access to essential services.

Our role extended beyond field operations. We led evacuation coordination, managed mass resource distribution, and established operational base camps and emergency shelters to support both displaced residents and response personnel. At the state level, we contributed to high-level emergency planning at Florida’s State Emergency Operations Center (SEOC), offering subject matter expertise that informed strategic decision-making.



Indelible has also partnered extensively with federal and state agencies to strengthen disaster recovery pipelines. Working alongside FEMA’s Disaster Survivor Assistance cadre, we conducted extensive outreach to connect survivors with critical programs, including FEMA Individual Assistance. In partnership with the Florida Department of Children and Families, we administered Disaster Supplemental Nutrition Assistance Program (D-SNAP) operations at 21 sites, helping thousands of families stabilize following catastrophic events.

Our hands-on experience during Hurricane Helene gave Indelible unique insight into the far-reaching impacts of disaster on individuals, families, and entire communities. We witnessed firsthand how vulnerable populations face immediate challenges accessing aid, navigating complex systems, and regaining stability. Working within the State Emergency Operations Center,



we observed how clear coordination and proactive planning are essential in reducing response gaps and ensuring equitable service delivery across diverse communities.

This experience has directly shaped our understanding of what the North Carolina Department of Commerce's Division of Community Revitalization (DCR) needs to successfully administer long-term recovery programs. We understand the urgency, sensitivity, and precision required to support communities post-disaster—not just in the immediate aftermath but through the full continuum of recovery. Our collaborative work with FEMA and the State Agencies demonstrated the importance of streamlined service delivery, effective public communication, and trusted community outreach—all of which we are prepared to bring to support DCR's mission and priorities.

Expertise in Complex Federal Funding Programs

Our team is deeply proficient in U.S. Department of Housing and Urban Development (HUD) disaster recovery programs and long-term resilience planning. We have successfully managed Community Development Block Grant – Disaster Recovery (CDBG-DR) funds at both state and local levels, ensuring transparent, compliant, and efficient distribution of federal resources. Indelible's portfolio includes:

- ❖ Developing post-disaster Action Plans for county governments.
- ❖ Providing subrecipient management for Florida Commerce (Hurricane Michael recovery).
- ❖ Delivering case management, outreach, and compliance oversight in support of major recovery programs across multiple storms.

Our familiarity with the complexities of administering federal funds makes us confident in ensuring compliance and maximizing eligible reimbursements. We know the Division of Community Revitalization must minimize operational downtime while securing every eligible dollar to support recovery. Our proven start-up process, detailed planning, staffing, training, financial controls, and quality assurance ensures rapid transition and efficiency, which is essential in the fast-paced environment following a disaster.

Practicing a rooted all-inclusive understanding of how each recovery program—from FEMA to HUD—intersects to form a cohesive path toward long-term resilience. Our experience delivering FEMA Public Assistance (PA) Advisory Services across seven federally declared disasters demonstrates our grasp of the entire recovery lifecycle, from immediate emergency response to strategic program closeout. We also have a long-standing partnership delivering FEMA Public Assistance Advisory Services, managing more than 3,500 subrecipients. Our work spans the full FEMA PA lifecycle—project formulation, obligation, cost validation, time extensions,



amendments, and closeout. Notably, we helped secure over \$500 million in FEMA PA funding for the Florida Department of Transportation, provided procurement technical assistance to municipalities, and guided institutions such as Embry-Riddle University through FEMA appeals.

This experience allows Indelible to bring a unique, integrated perspective to CDBG-DR implementation, understanding how FEMA PA decisions impact duplication of benefits, how procurement compliance affects both programs, and how early planning in one stream supports smoother closeout in another. For North Carolina families, this means fewer delays, faster recovery, and a coordinated effort that maximizes every available resource to restore homes, infrastructure, and livelihoods.

We Understand the Challenges

Implementing a \$1.4 billion CDBG-DR funding portfolio is not a simple undertaking. DCR will face significant pressure, not only in meeting HUD's complex compliance requirements, but also from residents and community stakeholders who may call on the DCR to directly manage recovery programs even at the local level. These expectations, while understandable, can stretch already limited staff capacity and introduce risks of delays, compliance gaps, or inconsistent service to the citizens most in need. Indelible understands these challenges and brings solutions to overcome them. Our approach includes deploying additional, highly qualified staff to immediately strengthen the Division's operational capacity while also embedding best practices that build long-term institutional knowledge. We combine day-one surge support with proven capacity-building strategies such as training DCR staff, transferring knowledge, and creating repeatable processes, so the Division is better positioned not just to deliver this recovery program efficiently and compliantly, but also to face future disasters with greater resilience.

Why This Matters for Division of Community Revitalization

Indelible is not a team that needs to "get up to speed." We bring a ready-to-execute model – honed through real-world deployments and teams trained to lead DCR operations, EOC staffing, resource distribution, and survivor support from day one. Working directly with residents affected by Hurricane Helene, our structured launch process ensures immediate impact through rapid mobilization, staff training, SOP development, and multi-tiered quality control – all aligned with HUD and state requirements. Indelible's ready-to-execute model is able to support North Carolina with a team that is capable, compassionate, and committed to making an immediate and lasting impact. Whether supporting survivors, coordinating across COADs and state agencies, or advising on federal recovery programs, we stand ready to deliver scalable, inclusive, and accountable solutions that strengthen North Carolina's resilience now and into the future.

Indelible offers deep insight into HUD programs, processes and community dynamics, guiding disaster recovery, mitigation, and resilience strategies. We've successfully managed CDBG-DR



programs at both the state and local levels, supporting Action Plan development for local governments, streamline the implementation, monitoring compliant case management, ensuring efficient and transparent administration federal funds that meet the needs of your resident needs.

We take great pride in supporting the local community. We strongly believe that vendors, who are deeply committed to the community, are best positioned to offer quality service with North Carolina's best interests at heart. Unlike other vendors who may need to hastily familiarize themselves with North Carolina's specific needs and operational landscape, Indelible already possesses a high baseline of knowledge and experience.

Simply put, when you hire Indelible, you employ a team of capable professionals whose diversity makes it the team of choice for the state of North Carolina. A team who is compassionate to the challenges faced by your constituents, not because we read about it in books or watched documentaries, but instead because we have lived through the same struggles. As our company and our team members primarily reside throughout the southeastern United States, we are ready for this mission and will be vigilant to the state of North Carolina's needs as a trusted business advisor who is actively present.

When every moment counts, North Carolina can count on Indelible.

Distinguishing Factors

What sets Indelible apart is not only our technical depth but also our ability to mobilize quickly in urban, high-density environments where every moment of disruption has outsized economic and social impact. We approach every engagement with urgency and precision, applying proven models for rapid start-up, structured staffing, process mapping, and multi-layered quality control.

Our track record includes:

- ❖ Partnered with State Emergency Management Agency on first-of-its-kind, groundbreaking Residential Mitigation Program.
- ❖ Delivered case management, duplication of benefits reviews, outreach management, and subject matter expertise for two large-scale housing recovery programs.
- ❖ Managing large-scale disaster recovery efforts following hurricanes and natural disasters – including DRCs, MARCs, and FRCs
- ❖ Managing multi-billion-dollar disaster recovery operations across multiple federally declared events.
- ❖ Supported recovery efforts for multiple hurricanes including Michael, Irma, Ian, Nicole, and Idalia.
- ❖ Delivered end-to-end grants management services that reduced audit risk and accelerated reimbursement timelines.

At Indelible, we recognize that federal funding is not just financial; it is a lifeline for communities and critical infrastructure. We are committed to ensuring that recovery resources reach those



most in need while enabling agencies like the Division of Community Revitalization to restore operations quickly, transparently, and effectively.

Simply put: Indelible combines the scale, expertise, and urgency required to safeguard and restore one of the nation's most vital transportation and commerce hubs.

Relevant Experience – Industry Trailblazers

At Indelible, we don't just provide disaster response, recovery, and mitigation services, we build lasting partnerships and strive to make an indelible impact wherever we work.

Beyond disaster response, Indelible has consistently delivered effective, equity-focused solutions across housing stability, public health, and mitigation. Through the Emergency Rental Assistance Program (ERAP), we supported large-scale housing stabilization efforts by streamlining outreach, intake, and case management to assist vulnerable renters facing eviction. Our leadership in Florida's Homeowner Assistance Fund (FL HAF) further demonstrated our ability to support at-risk households through mortgage relief and housing counseling, mitigating long-term displacement and financial hardship.

Indelible's impact extends across sectors and geographies. In New York City, we partnered with the Department of Sanitation to conduct multi-lingual, community-based outreach across underserved boroughs, helping residents understand and navigate critical sanitation and environmental services. In Miami-Dade County, we led the VAX 305 campaign, bringing together public health partners, community leaders, and healthcare providers to increase COVID-19 vaccination rates in historically hesitant communities. This campaign was grounded in trust-building, cultural competence, and data-driven outreach strategies that connected with residents where they are both physically and emotionally.

Currently, Indelible is engaged with the Florida Division of Emergency Management (FDEM) and prime contractor Deloitte on Florida's first statewide Residential Mitigation Program. This program focuses on strengthening community resilience through proactive risk reduction, an effort we are proud to lead. Our responsibilities span:

- ❖ Case Management, guiding homeowners through the application process and eligibility reviews
- ❖ Construction Services, assigning and coordinating licensed contractors
- ❖ Temporary Relocation Coordination, streamlining the process to reduce resident disruption
- ❖ Final Inspections, ensuring quality assurance and project closeout

This program exemplifies Indelible's forward-looking commitment to not just recover from disasters, but to prevent them. By implementing mitigation measures that protect private



residences from future storms and hazards, we're building safer communities, reducing the long-term cost of disasters, and helping families stay in their homes.

Indelible's integrated capabilities across recovery, resilience, and community engagement make us uniquely positioned to support North Carolina's disaster recovery needs, while also laying the groundwork for a stronger, more resilient future. Our past performance highlights Indelible's proven experience delivering compliant, client-focused solutions. Additional details are available in **Attachment H**.

The Indelible Difference

Indelible offers Division of Community Revitalization a team of practitioners who have directly managed CDBG-DR and other HUD-based state-level recovery programs of comparable size and complexity. Our team is not just consulting from the outside, we have sat in the chairs of County staff and state directors, giving us unmatched perspective on compliance, program management, and delivery. This depth of expertise ensures North Carolina will have a partner that can rapidly launch its \$1.4 billion in CDBG-DR program and sustain it through the three-year performance period.

State-Level Program Leadership

- ❖ **Drew Winters:** Former Director of the Office of Disaster Recovery for Florida's Department of Commerce, where he oversaw \$2.2 billion in CDBG-DR and CDBG-MIT funding for long-term resilience projects.
- ❖ **Mario Rubio:** Former Deputy Secretary at Florida Commerce, where he led the administration of approximately \$2.5 billion in federal and state programs including LIHEAP, WAP, CSBG, CDBG, CDBG-DR, and broadband initiatives.
- ❖ **DeAnna Poland-Stemock:** Former Business Operations Bureau Chief at the Florida Department of Commerce's Office of Long-Term Resiliency where she oversaw the management of CDBG-DR funding, totaling \$1.3 billion dollars, aimed at housing repair following Hurricanes Irma, Michael, and Ian.

Local Government Expertise

- ❖ **Roger Mercado:** Former Director at Lee County Human and Veteran Services where was responsible for planning, coordinating, directing, and reviewing housing, human, and veteran service programs. He oversaw the development of the department's requests for CDBG, HOME, Emergency Shelter Grant, Homeless Continuum of Care, Supportive Housing Program, and other Federal, State, and private funding grants.

Our clients need professionals who can step in immediately, assume critical roles, and drive results without delay. Indelible provides teams equipped to lead rapid start-up efforts through a structured and proven approach. Our launch process includes accelerated, in-depth planning; strategic staffing; hands-on training; process mapping; financial controls; and the development of detailed standard operating procedures (SOPs), all supported by a multi-layered quality control

system. This model is especially effective in Emergency Operations Centers (EOCs), DRCs and MARCs, where speed, coordination, and precision are critical. Our team brings direct experience operating within and supporting EOCs at local, state, and federal levels - enabling us to quickly align with existing command structures, strengthen situational awareness, enhance interagency coordination, and support real-time decision-making. We've successfully implemented this model across numerous projects, demonstrating our ability to minimize transition time and maximize early impact - an essential advantage in emergency environments.

Key Personnel Profiles

 <p>Drew Winters, Esq. CDBG-DR Program Principal</p>	<p>Role: Provides executive oversight, ensuring compliance with HUD/DCR requirements, sets program strategy, manages strategic alignment, stakeholder engagement, risk management, and supports program leadership. Provides day-to-day guidance to the Project Manager on tasking, workstream coordination, compliance monitoring, and transparent program reporting.</p> <p>Experience: Former Director of the Office of Disaster Recovery for Florida's Department of Commerce; Executive sponsor and primary County liaison; sets strategy, removes roadblocks, approves major decisions and deliverables.</p>
 <p>Mario Rubio CDBG-DR Program Manager</p>	<p>Role: Oversees subrecipient contracting, compliance, and reporting; manages DRGR data entry; and ensures programs align with HUD-approved Action Plans. Provides day-to-day leadership over scope, schedule, budget, risk, and cross-workstream delivery.</p> <p>Experience: Former Deputy Secretary for the Florida Department of Commerce; Day-to-day lead over scope, schedule, budget; runs PMT/IRMO routines, manages risks, and drives cross-workstream delivery and reporting.</p>
 <p>Grayson Dunn, MBA CDBG-DR Deputy Program Manager</p>	<p>Role: Supports Program Manager through daily oversight, staff coordination, quality control, surge management, and liaison with DCR. Oversees compliance framework (2 CFR 200, HUD CPD, state/local); establishes policies, monitoring plans, corrective actions, and DRGR controls. Provides day-to-day operational oversight across teams.</p> <p>Experience: Former Florida Department of Commerce; Oversees compliance framework (2 CFR 200, HUD CPD, state/local); establishes policies, monitoring plans, corrective actions, and DRGR controls.</p>

 <p>DeAnna Poland-Stemock Program Planner/Strategist</p>	<p>Role: Develops strategies for program design, unmet-needs assessments, resilience planning, and long-term recovery prioritization in alignment with HUD requirements. Oversees policy development, performance metrics, and program design improvements. Provides day-to-day strategic guidance on planning activities and recovery priorities.</p> <p>Experience: Former Bureau Chief of Business Operations at Florida Commerce's Office of Long-Term Resiliency, experienced in managing housing programs from intake to closeout, supervising staff, ensuring HUD/2 CFR compliance, underwriting, and reporting performance metrics.</p>
 <p>Benjamin "Ben" Lee Project Manager</p>	<p>Role: Manages schedules, budgets, risks, and deliverables across task orders; oversees reporting dashboards, workflow coordination, and cross-team dependencies to ensure timely execution. Ensures compliance with federal and state regulations through structured oversight and performance tracking. Provides day-to-day management of project delivery.</p> <p>Experience: Benjamin has extensive experience managing federally funded recovery operations, specializing in 2 CFR 200 compliance, FEMA PA regulations, grant management, and performance tracking, enabling \$400M+ in reimbursements through effective oversight and coordination.</p>
 <p>Mikhail Scott Public Information Officer</p>	<p>Role: Leads public information and stakeholder engagement, developing multilingual outreach, coordinating media and town halls, ensuring ADA/LEP compliance, and refining strategies through tracking and feedback. Provides day-to-day oversight of communications, public messaging, and community engagement activities.</p> <p>Experience: Mikhail is an outreach and communications leader with experience directing disaster recovery centers, DSNAP operations, multilingual campaigns, and \$25M budgets, ensuring ADA/LEP compliance, stakeholder engagement, and effective public information delivery.</p>
	<p>Role: Reviews subrecipient and vendor procurement actions, ensures compliance with federal and state procurement standards, evaluates cost reasonableness, and maintains complete procurement documentation for audit readiness.</p>

<p>Johnwayne Reid Procurement Specialist</p>	<p>Provides day-to-day oversight of procurement reviews and compliance documentation.</p> <p>Experience: Johnwayne has extensive experience in procurement compliance and disaster recovery grants management, leading FEMA PA reviews, emergency purchasing compliance, and 2 CFR 200 policy evaluations to ensure efficient, compliant, and audit-ready procurement activities.</p>
 <p>Karen Bushnell Policy & Compliance Analyst</p>	<p>Role: Drafts policy and SOPs, develops Action Plan amendments, monitor civil rights and fair housing compliance, and supports readiness for monitoring visits. Provides day-to-day oversight of policy development, compliance monitoring, and audit preparedness activities.</p> <p>Experience: Karen specializes in federal grants compliance, policy development, and audit readiness, with experience across FEMA, HUD, and DOT programs, authoring SOPs, conducting DOB reviews, and strengthening internal controls and financial oversight.</p>
 <p>Kyle Erickson DOB Supervisor</p>	<p>Role: Reviews financial transactions, ensures compliance with 2 CFR Part 200, prevents fraud, waste, and abuse, and prepares financial records for audits. Provides day-to-day oversight of DOB reviews, financial compliance, and audit preparation activities.</p> <p>Experience: Kyle specializes in financial compliance, internal audit, and risk management, supporting state agencies and Fortune 500 firms with expertise in reporting, controls, regulatory compliance, and process improvements to strengthen governance and prevent fraud.</p>
 <p>Alfred Battle III, MBA Appeals Review Coordinator</p>	<p>Role: Designs and delivers training programs for staff and subrecipients, develops training materials, and builds long-term partner capacity to meet HUD standards. Provides day-to-day oversight of appeals review training, documentation, and compliance support activities.</p> <p>Experience: Mr. Battle develops program documentation, outreach materials, and compliance reports for HUD-funded programs, translating complex requirements into clear</p>

	guidance and producing audit-ready materials that support CDBG-DR compliance and effective stakeholder communication.
 Trevor Boscacci, CPA Financial Compliance Specialist	<p>Role: Reviews financial transactions, ensures compliance with 2 CFR Part 200, prevents fraud, waste, and abuse, and prepares financial records for audits. Provides day-to-day oversight of financial compliance reviews, internal controls, and audit readiness activities.</p> <p>Experience: Trevor specializes in financial compliance, internal audit, and risk management, supporting state agencies and Fortune 500 firms with expertise in reporting, controls, regulatory compliance, and process improvements to strengthen governance and prevent fraud.</p>
 Carlin Daniels, MBA Internal Auditor	<p>Role: Conducts internal reviews, verifies compliance with federal and state requirements, and prepares corrective action plans for HUD and OIG audits. Provides day-to-day oversight of internal audits, compliance verification, and corrective action planning.</p> <p>Experience: Carlin has extensive experience in auditing, compliance, and risk management, conducting financial audits, FEMA PA and HUD compliance reviews, and developing risk assessments to strengthen audit readiness and internal controls for CDBG-DR programs.</p>
 Rebecca Wilson Documentation Specialist	<p>Role: Develops, organizes, and maintains program documentation, SOPs, policy memos, and audit-ready records to support compliance and transparency. Provides day-to-day oversight of documentation management, SOP development, and compliance recordkeeping.</p> <p>Experience: Rebecca specializes in grants management, compliance documentation, and process improvement, supporting FEMA PA and state programs by maintaining audit-ready records, developing SOPs, and guiding applicants through appeals, amendments, and compliance reviews.</p>
	<p>Role: Produces performance dashboards, DRGR-aligned reports, and data analyses to support decision-making, unmet needs assessments, and compliance tracking. Provides day-to-day oversight of data reporting, performance tracking, and compliance analytics.</p>

<p>Christopher Johnson, MPS Data and Reporting Specialist</p>	<p>Experience: Christopher is a disaster recovery specialist with experience in FEMA IA and Florida's HAF program, specializing in data tracking, system integration, and case management optimization to enhance compliance and oversight.</p>
 <p>Brianna Beynert, PMP Training Program Coordinator</p>	<p>Role: Designs and delivers training programs for staff and subrecipients, develops training materials, and builds long-term partner capacity to meet HUD standards. Provides day-to-day oversight of training development, delivery, and compliance capacity-building activities.</p> <p>Experience: Brianna has extensive experience in staff training, program oversight, and grant management, leading D-SNAP teams, facilitating workshops, providing technical assistance, and ensuring compliance for state and federally funded recovery programs.</p>
 <p>Aarika Rowells, MBA Case Management Supervisor</p>	<p>Role: Supervises case management teams from intake through closeout, ensures consistent application of eligibility rules, and coordinates applicant communications and resolution. Provides day-to-day oversight of case management operations, eligibility reviews, and applicant communications.</p> <p>Experience: Aarika has extensive experience in disaster recovery and compliance, overseeing FEMA PA programs, supervising case management teams, and managing grant compliance, allocating \$5M+ in COVID-19 relief and monitoring 2,700 providers.</p>
 <p>Steve Killough Relocation Program Manager</p>	<p>Role: Manages temporary housing programs, overseeing intake, eligibility, and placement. Ensures HUD/FEMA compliance, supervises staff, resolves applicant escalations, and coordinates logistics across partners to deliver efficient, applicant-focused housing assistance. Provides day-to-day oversight of temporary housing operations, eligibility determinations, and applicant service delivery.</p> <p>Experience: Steve brings 30+ years of management experience, specializing in compliance, operations, and staff supervision. He supports temporary housing programs by overseeing intake, eligibility, placement, and applicant-focused service delivery.</p>

 <p>Xavier Wooten Relocation Compliance Lead</p>	<p>Role: Oversees relocation compliance activities, producing performance dashboards, DRGR-aligned reports, and data analyses to support decision-making, unmet needs assessments, and compliance tracking. Provides day-to-day oversight of relocation documentation reviews, reimbursement validation, and compliance monitoring to ensure accurate, efficient, and audit-ready program operations.</p> <p>Experience: Xavier has experience supporting displaced families through housing placement and relocation services, coordinating applicants and housing providers, maintaining compliance, and validating reimbursements to ensure accurate, efficient, and compassionate disaster recovery assistance.</p>
 <p>Lawrence McCalla Case Manager Lead</p>	<p>Role: Supervises case management staff, oversees intake and eligibility reviews, ensures DOB compliance, manages escalations, and monitors team performance to maintain quality and timeliness. Balances compliance with applicant-focused service delivery. Provides day-to-day oversight of case managers, workload distribution, performance monitoring, and complex case resolution.</p> <p>Experience: Lawrence has extensive CDBG-DR case management experience, supporting Florida's HRRP, reviewing FEMA, SBA, and insurance documentation, and supervising \$25M+ in validation efforts, ensuring compliance, applicant support, and program integrity.</p>
 <p>L.T. McCrimmon, MPA Communication Specialist</p>	<p>Role: Develops and executes multi-channel outreach campaigns to drive public awareness and participation in CDBG-DR programs. Coordinates with community partners and media outlets to deliver targeted messaging, ensure consistent stakeholder engagement, and maintain alignment with program goals. Provides day-to-day oversight of outreach strategies and communications delivery</p> <p>Experience: L.T. is a communications and public affairs professional with 20+ years of experience developing strategies, managing outreach campaigns, and translating complex policies into clear messaging to engage stakeholders and advance organizational priorities.</p>

 <p>Joanne Peters Denny Technical Writer – Stakeholder Engagement</p>	<p>Role: Creates and edits clear, accessible content—such as FAQs, press releases, toolkits, and digital materials—to support stakeholder communication and engagement. Ensures all public-facing documents align with HUD and DCR guidelines, maintaining accuracy, consistency, and compliance. Provides day-to-day oversight of content development and quality assurance.</p> <p>Experience: Joanne has over 20 years of experience developing clear, accessible documentation, policies, and SOPs. She specializes in simplifying complex regulations, compliance communications, and creating user-focused materials for federal, state, and higher education programs.</p>
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Program Methodology and Compliance

Since inception, Indelible has played a pivotal role in helping state and local governments, federal agencies, and public institutions recover from disasters by deploying rapid-response teams, managing large-scale recovery operations, and ensuring compliance with HUD regulations during long-term recovery efforts. Our mission-driven approach is rooted in the ability to mobilize subject matter experts, streamline recovery processes, and optimize cost recovery efforts.

Indelible has supported recovery programs with the Florida Department of Commerce, Florida Division of Emergency Management, Lee County, Sarasota County, the Alabama Department of Economic and Community Affairs, and multiple FEMA-led operations. Across these engagements, we have demonstrated the ability to help communities secure HUD funding, meet compliance benchmarks, and strengthen systems for long-term resilience. These experiences directly align with the needs of the North Carolina Department of Commerce (DCR) as it manages Hurricane Helene recovery and other federally funded programs.

We understand that disaster recovery impacts all levels of a community from state agencies responsible for administering funds, to local governments managing subrecipient programs, to the individual residents navigating the recovery process. Natural disasters such as hurricanes, floods, and tornadoes create lasting financial and operational challenges that demand swift action and precise management. Our team has developed and refined a proactive, systematic approach that not only restores communities but also helps them become stronger, more prepared, and better equipped to handle future challenges.

For North Carolina, Indelible will bring a customized, data-driven framework that integrates:

- ❖ Project management to ensure recovery efforts are structured, coordinated, and results driven.
- ❖ Financial oversight to validate expenditures, strengthen cost tracking, and protect funding eligibility.
- ❖ Regulatory compliance monitoring to ensure full adherence to HUD, 2 CFR 200, and state requirements.
- ❖ Grant management expertise to streamline reporting, avoid duplication of benefits, and support subrecipients.
- ❖ Quality assurance and project oversight that embeds compliance checkpoints into every phase of program delivery.

This methodology ensures that the North Carolina Department of Commerce can maximize HUD funding opportunities while maintaining strict compliance, reducing administrative burden, and building the state's long-term recovery capacity.

Centralized Accountability & Leadership

The Project Manager will serve as the central point of accountability for all task orders issued under this contract. Acting as both strategist and executor, the Project Manager ensures that recovery activities remain on scope, on schedule, on budget, and in full compliance with federal and state requirements. This leadership role not only coordinates staff and deliverables but also instills confidence in DCR leadership that program operations are aligned with state and federal expectations.

Responsibilities of the Project Manager

- ❖ **Strategic Oversight** – Provides overall leadership, aligning operations with DCR goals and federal guidance.
- ❖ **Operational Coordination** – Directs staff assignments, monitors deliverables, and enforces compliance checkpoints.
- ❖ **Quality Assurance Sign-Off** – Validates every procurement package, eligibility determination, and financial report.
- ❖ **Risk and Escalation Management** – Implements escalation protocols to resolve issues swiftly.
- ❖ **Transparency and Engagement** – Acts as the bridge between Indelible, DCR leadership, subrecipients, and the public.

Disciplined Framework for Compliance and Oversight

Indelible employs a scalable and adaptive Project Management Office (PMO) framework that embeds quality assurance, regulatory compliance, and structured oversight into every phase of

program delivery. This framework was purpose-built for federally funded recovery programs and is proven across engagements with local municipalities and state agencies following disasters such as Hurricanes Michael, Irma, and Ian.

At the center of this model is the Project Manager, who provides overall leadership and ensures alignment with DCR's goals, HUD guidance, and federal requirements under 2 CFR 200. Day-to-day management resides with the Project Manager, who is responsible for assigning task orders, coordinating workstreams, ensuring compliance, and maintaining transparency across all aspects of the program.

Our disciplined approach does more than enforce compliance, it creates a culture of accountability and continuous improvement. By weaving risk management, performance tracking, and stakeholder transparency into daily operations, Indelible ensures that program outcomes are measurable, defensible, and responsive to North Carolina's evolving recovery needs.

Integrated Quality Assurance and Oversight

Indelible's Quality Assurance (QA) and oversight structure is designed as a layered, continuous system, not a one-time review. Compliance responsibilities are distributed across specialized roles, supported by a disciplined Project Management framework that ensures accountability at every level.

Key Oversight Roles

- ❖ **Policy & Compliance Analysts** – Develop and update SOPs that reflect HUD, 2 CFR 200, and state guidance.
- ❖ **Internal Auditors** – Conduct independent assessments of contracts, financial transactions, and case files to confirm accuracy, compliance, and efficiency.
- ❖ **Financial Compliance Specialists** – Monitor expenditures in real time, validating cost allowability, allocability, and reasonableness to protect against disallowed costs.
- ❖ **Documentation Specialists** – Maintain consistent, audit-ready case records and procurement files that strengthen transparency and defensibility.
- ❖ **Appeals Review Specialists & Case Manager Leads** – Oversee eligibility determinations, appeals, and exceptions, ensuring fairness and defensibility across applicants.
- ❖ **Duplication of Benefits (DOB) Compliance Officers** – Apply automated data-matching protocols and corrective action procedures to prevent duplication of benefits.

This integrated team ensures that oversight is not episodic but continuous throughout the program lifecycle, creating redundancies that safeguard compliance and strengthen defensibility during audits and monitoring.

Multi-Tiered QA Process

Oversight roles are supported by a multi-tiered QA review system that embeds accountability and compliance checkpoints into every deliverable:

1. First-level reviews by program staff to ensure accuracy and completeness.
2. Independent audits and validations conducted by Internal Auditors and Financial Specialists.
3. Final Project Manager sign-off, ensuring every procurement package, case determination, and financial report is compliant, audit-ready, and aligned with HUD/DCR standards.

Benefits of Multi-Tiered QA Process



This process ensures that risks are identified early, corrective actions are documented, and all outputs are defensible under external audit.

Additional Specialized Support

Beyond compliance roles, the Project Manager is supported by specialists that extend program effectiveness:

- ❖ **Procurement Specialists** – Develop compliant solicitation packages, enforce competitive processes, and monitor vendor awards.
- ❖ **Grant Managers / CDBG-DR Specialists** – Translate federal and state requirements into daily operational practice.

- ❖ **Data & Reporting Specialists** – Manage DRGR, build dashboards, and monitor performance metrics for real-time visibility.
- ❖ **Program Planners / Strategists** – Convert Action Plan priorities into operational playbooks and measurable goals.
- ❖ **Public Information Officers** – Lead outreach and stakeholder engagement.
- ❖ **Technical Writers & Training Coordinators** – Produce practical tools and deliver training to build DCR's long-term recovery capacity.

Rapid Mobilization and Surge Staffing

Within 24 hours of task order issuance, the Project Manager has the authority to assemble a tailored, multidisciplinary team by drawing on Indelible's nationwide bench of more than 100 professionals. This surge capacity ensures that DCR can immediately scale staffing in critical areas whether housing case management, procurement oversight, financial compliance, or audit readiness without disrupting program operations.

Indelible's staff pool includes subject-matter experts in housing recovery, infrastructure, procurement, finance, and regulatory compliance who can be mobilized as needed to meet both short-term demands and long-term recovery operations. This rapid surge capability allows DCR to flex staffing levels seamlessly, maintain compliance, and deliver recovery services with consistency and efficiency across all task orders.

Transparency and Reporting

Indelible maintains real-time visibility for DCR leadership and HUD monitoring staff through the work of our Data and Reporting Specialists, who assist our clients to manage Disaster Recovery Grant Reporting (DRGR), build transparency dashboards, and track key performance indicators. These tools demonstrate not only how funds are being spent but also whether program goals are being achieved. Grant Managers and CDBG-DR Specialists translate federal and state requirements into operational practice, while Program Planners and Strategists convert Action Plan priorities into measurable performance metrics aligned with unmet needs assessments.

Through transparent reporting, Indelible reduces risks of mismanagement, strengthens public trust, and ensures stakeholders including HUD have full visibility into program execution.

Regulatory and Procurement Controls

Federal procurement rules are often the source of compliance findings, making strict oversight essential. To mitigate this, Indelible's Procurement Specialists develop standardized procurement packages, evaluation criteria, and monitoring checklists that promotes consistency and defensibility. Every solicitation and contract is reviewed for compliance with 2 CFR 200, HUD-specific guidance, and state requirements.



Policy & Compliance Analysts continually refine procurement policies to reflect evolving regulations, while Financial Compliance Specialists and Internal Auditors confirm that procurement records remain complete and audit-ready. This rigorous control structure minimizes the risk of findings, de-obligations, or funding claw backs, while maintaining the integrity of DCR's procurement activities.

Technology-Enabled Oversight

Technology underpins Indelible's compliance and QA framework:

- ❖ Smartsheet drives workflow automation and issue tracking.
- ❖ Power BI provides real-time dashboards with financial and performance metrics.
- ❖ DRGR serves as the central system of record for HUD reporting.

Automated alerts notify managers of overdue deliverables or emerging compliance risks, while centralized repositories maintain version control and document integrity. By combining human expertise with technology enabled systems, Indelible delivers a governance model that is proactive, reliable, and built to withstand federal and state scrutiny.

Continuous Improvement

Indelible follows a five-phase lifecycle: Initiation, Planning, Execution, Monitoring & Controlling, and Closeout each phase reinforced by compliance checkpoints and multi-tiered QA reviews. This structured process not only ensures accuracy and accountability but also creates a culture of continuous improvement across all recovery operations.

To integrate lessons learned into daily practice, we conduct after-action reporting and facilitated workshops with DCR leadership, subrecipients, and program staff. These sessions identify successes, surface challenges, and drive updates to SOPs and playbooks. By institutionalizing these refinements, Indelible strengthens long-term program capacity, reduces recurring risks, and ensures that recovery efforts remain responsive to evolving community needs.

Five-Phase Methodology

1. **Initiation** – Immediate stakeholder coordination, scoping, and compliance alignment to set a compliant foundation.
2. **Planning** – Development of task order playbooks, critical policies, SOPs, and QA protocols.
3. **Execution** – Deployment of specialized staff, implementation of workflows, and ongoing compliance monitoring.

4. **Monitoring & Controlling** – Ongoing oversight through dashboards, performance metrics, escalations, and corrective action tracking.
5. **Closeout** – Deliverable reconciliation, audit preparation, and lessons learned to strengthen institutional capacity.

This continuous improvement model provides DCR with a strong governance structure where risks are identified early, corrective actions are documented, and program outcomes are measured consistently. By combining subject-matter expertise with a structured oversight model, Indelible ensures that DCR's recovery programs are not only compliant but also transparent, efficient, and results-driven.

Technical Approach to Tasks

Task 1 – Development of Policies, Procedures, and SOPs

Team Indelible will support North Carolina Department of Commerce by developing a structured, stakeholder-driven methodology to develop, review, and refine policies, procedures, and standard operating procedures (SOPs) that align with federal, state, and local regulations, including HUD CDBG-DR and CDBG-MIT guidelines. We understand that effective disaster recovery begins with thoughtful planning, informed development, and efficient execution. Our team will work side by side with DCR to assist in executing a program structured to deliver on your objectives and goals. Drawing from our experience supporting statewide CDBG-DR programs in Florida following Hurricanes Michael, Irma, and Ian, our approach ensures all documentation is compliant, accessible, operationally sound, and responsive to programmatic needs.

Approach Overview:

1. **Initiation and Planning:**
 - Conduct kickoff with stakeholders to identify policy priorities, timelines, and compliance objectives.
 - Establish document control protocols and SOP templates approved by the client.
2. **Needs Assessment and Gap Analysis:**
 - Review existing policies and operational workflows.
 - Perform regulatory gap analysis to ensure alignment with HUD, URA, 2 CFR 200, and state-specific mandates.
3. **Drafting and Development:**
 - Policy & Compliance Analyst leads the drafting of new or revised policies using approved templates.
 - Technical Writer ensures clarity, structure, and accessibility across all documents.
4. **Stakeholder Engagement and Review:**
 - Facilitate stakeholder reviews, including program leadership and legal counsel.

- Conduct working sessions for policy vetting and feedback collection.

5. Finalization and Approval:

- Incorporate revisions and finalize documents for internal approval and public posting (if applicable).
- Ensure all deliverables meet internal QA/QC standards and audit requirements.

6. Implementation Support and Training:

- Deliver rollout plan for each approved SOP including reference guides and FAQs.
- Provide training materials and lead briefing sessions to operational teams.

Our process will leverage subject matter expertise, regulatory crosswalks, and best practices from previous disaster recovery engagements to ensure timely delivery of policies that support effective program administration and audit readiness.

Key Personnel Roles

Policy & Compliance Analyst

Technical Writer

Task 2 – Financial Compliance, Oversight, and Fraud Prevention

Indelible will partner with the DCR to implement a proactive, risk-informed financial compliance and oversight program to ensure that all disaster recovery and mitigation funds are administered in accordance with HUD regulations, 2 CFR Part 200, and state-specific fiscal controls. Our approach is rooted in the belief that prevention is more effective than correction—and integrates training, system automation, and targeted reviews to strengthen internal controls, prevent fraud, and ensure financial accountability across all CDBG-DR and CDBG-MIT programs.

Risk-Based Monitoring and Fiscal Oversight

Our Financial Compliance Specialist will conduct programmatic and fiscal risk assessments to prioritize monitoring efforts. These assessments will inform the development of monitoring plans tailored to the specific risk profiles of public service, infrastructure, and housing programs. Using a risk-based framework, we will implement structured monitoring tools and procedures, including expenditure reviews, subrecipient testing, and compliance checklists aligned with HUD's financial requirements and the Stafford Act.

System-Driven Controls and Automation

Technology will play a critical role in our approach. Indelible will support DCR's financial oversight through system-enabled workflows that prevent duplication of benefits, enforce required documentation before payment release, and maintain audit-ready records. Platforms such as Neighborly Software will be used to automate financial validations, track risk ratings, and provide real-time reporting dashboards for both DCR and subrecipients. All financial records will be stored in a centralized repository with stage gates and role-based approvals to ensure compliance documentation is complete and reviewable at each milestone.



DRGR Management, Reporting Integrity and Audit

Indelible will also oversee the management and preparation of Disaster Recovery Grant Reporting (DRGR) submissions, ensuring financial and performance data are accurate, timely, and reflect approved uses of funds. Our team will assist in setting up DRGR templates, managing data integration from subrecipient programs, and implementing quality control reviews to minimize reporting discrepancies. We will train DCR and subrecipient staff on DRGR protocols and compliance expectations, further reinforcing reporting integrity and audit readiness.

When audits or monitoring reviews occur—whether internal, external, or by HUD's OIG—Indelible will support the DCR with full documentation preparation, response coordination, and findings mitigation. Our role includes developing internal audit protocols and maintaining system access controls for real-time auditor access to supporting records, approvals, and compliance checklists.

"Learn-Apply-Verify" Compliance Model

Indelible will deliver comprehensive training to DCR staff and subrecipients focused on federal financial requirements, HUD cross-cutting mandates, and internal policy compliance. Our sessions follow a practical "learn-apply-verify" model, including hands-on exercises, role-specific SOPs, and knowledge checks. These trainings will be delivered by experienced subject matter experts and tracked for participation, competency, and areas requiring reinforcement—supporting DRGR readiness and downstream audit preparedness.

By combining advanced compliance tools, rigorous financial oversight, and expert-led training, Indelible's approach to Task 2 ensures that all federal funds administered through DCR are safeguarded, traceable, and deployed in a manner that withstands the highest levels of public and regulatory scrutiny.

Key Personnel Roles

Financial Compliance Specialist

Internal Auditor

Task 3 – Duplication of Benefits (DOB) Compliance

Indelible will partner with the North Carolina Department of Commerce, Division of Community Revitalization (DCR), to implement a robust and HUD-compliant framework for Duplication of Benefits (DOB) compliance. Our approach integrates proven methodologies, developed through our experience supporting DOB processes for the Alabama CDBG-DR Hurricane Sally recovery, with North Carolina-specific program guidance and statutory obligations. Working closely with DCR leadership and legal advisors, Indelible will support the tailoring of policy and operational frameworks to reflect both regulatory mandates and North Carolina's equity-focused recovery goals. Indelible will align the current Division DOB compliance structure with applicable federal



statutes, including Section 312 of the Stafford Act and HUD's DOB guidance outlined in Federal Register Notices (e.g., 84 FR 28836).

At the core of our strategy is an integrated system that identifies and reconciles multiple sources of assistance, including FEMA, SBA, NFIP, private insurance, and other federal or state recovery programs. Indelible's technical specialists and compliance staff will ensure that these sources are accurately accounted for using secure data sharing agreements and import protocols designed to feed directly into DCR's case management system. This ensures that DOB compliance is embedded in every phase of the applicant lifecycle, from intake through award calculation and program closeout.

Our Case Manager Leads will work directly with applicants to explain DOB requirements and guide them through the disclosure and documentation process. In tandem, our Appeals Review Specialists and Financial Compliance Specialist will conduct detailed reconciliations to calculate net eligible benefits. This includes identifying excludable sources per HUD guidance, determining allowable offsets, and ensuring that no applicant receives duplicative assistance for the same purpose.

To maintain program integrity, Indelible embeds compliance checkpoints within automated workflows, accompanied by rigorous quality control reviews. This multi-layered validation approach allows for early detection of discrepancies and enforces accountability throughout the decision-making chain. Appeals protocols will also be incorporated, allowing applicants to contest DOB determinations. These will be reviewed by our DOB Compliance Officer, who will issue written determinations in accordance with DCR policy.

Recognizing the importance of capacity building, Indelible will deliver targeted training for DCR and subrecipient staff. In these sessions the DOB Compliance Officer will cover DOB fundamentals, document verification, exception handling, and common applicant scenarios, all supported by job aids and reference materials designed for ongoing use.

Our DOB compliance model is tailored to meet HUD's audit standards, ensure equitable outcomes for North Carolina's disaster-impacted residents, and support the State's long-term recovery infrastructure.

Key Personnel Roles

DOB Compliance Officer

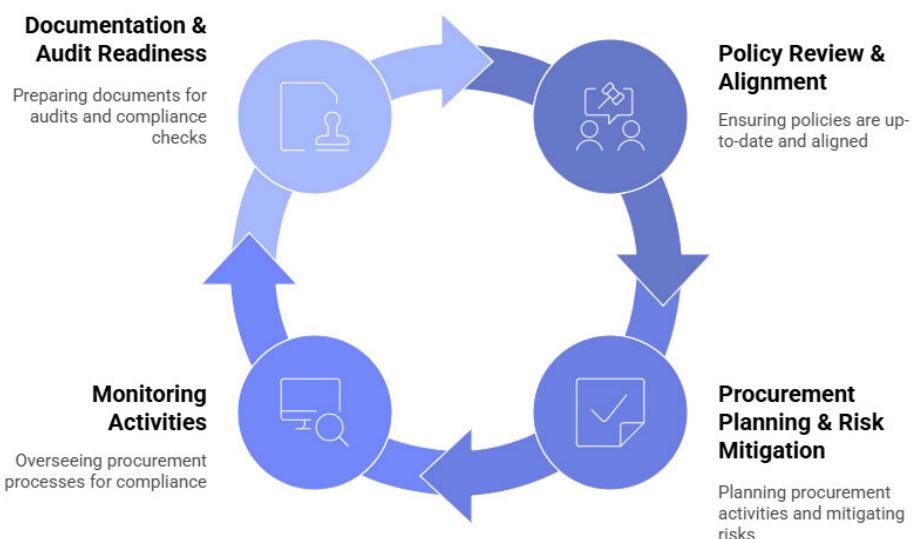
Financial Compliance Specialist

Task 4 – Procurement Compliance and Monitoring

Indelible has extensive experience supporting procurement compliance and monitoring for federally funded recovery programs. Our team has guided state and local governments through procurement processes that meet 2 CFR 200, HUD requirements, and state regulations, ensuring transparency, accountability, and cost reasonableness in vendor selection. Indelible has supported procurement reviews for housing and infrastructure programs, helping agencies avoid disallowed costs and withstand audit scrutiny.

Our team will guide the North Carolina Department of Commerce (DCR) through a transparent procurement process establishing and maintaining robust procurement compliance processes across all phases of the CDBG-DR and CDBG-MIT lifecycle, ensuring fairness and competitiveness. We will assist in developing clear and comprehensive solicitation documents that outline detailed scopes of work, performance standards, and compliance requirements.

Procurement Lifecycle Wheel



1. Procurement Policy Review & Alignment

- Review DCR's existing procurement policies and procedures for alignment with 2 CFR Part 200.317–.326 and HUD procurement guidelines.
- The Policy & Compliance Analyst will lead a detailed compliance gap assessment and recommend revisions to reflect updated HUD requirements or state-specific priorities.
- Update or create procurement manuals and templates tailored to DR/MIT-funded programs.

2. Procurement Planning & Risk Mitigation

- The Procurement Specialist will assist DCR and subrecipients in developing Procurement Plans that include cost estimation, method of procurement selection, and performance timelines.
- Establish pre-solicitation checklists and templates for common procurement types (e.g., construction, professional services).
- Integrate procurement planning into program timelines to avoid project delays and compliance risks.

3. Monitoring of Procurement Activities

- Implement a risk-based monitoring framework to assess subrecipient procurement activities.
- Develop procurement monitoring tools and standardized checklists, including compliance with small business, minority-owned, and Section 3 requirements.
- Conduct periodic reviews of solicitation packages, bid evaluations, and contract awards to ensure fairness and documentation integrity.

4. Documentation and Audit Readiness

- Maintain procurement files with documentation such as cost estimates, bid evaluations, contract negotiations, and conflict of interest certifications.
- Support the development of audit-ready files and document control systems.
- Collaborate with internal auditors to ensure files are organized according to HUD's monitoring expectations.

Indelible will conduct compliance monitoring of procurement activities throughout the program lifecycle. In collaboration with our Training Program Coordinator, the Procurement Specialist will develop training for DCR staff and subrecipients on procurement methods, documentation, and best practices. This includes reviewing solicitations, contracts, technical assistance to troubleshoot procurement issues, manage change orders, and prepare documentation for HUD monitoring visits or audits. By combining procurement expertise with disciplined oversight, Indelible will ensure that DCR's procurement activities safeguard public funds, maintain transparency, and accelerate the delivery of safe, resilient housing for impacted residents.

Key Personnel Roles

Procurement Specialist

Policy & Compliance Analyst

Task 5 – Claims, Appeals, and Case Reviews

Indelible recognizes that a fair and transparent process for handling claims, appeals, and case reviews is critical to the success of any disaster recovery program. Our team has managed thousands of applicant cases through CDBG-DR housing programs, implementing systems that ensure applicants have clear avenues to request reviews, submit additional documentation, and



appeal decisions. Building upon our past performance in managing disaster recovery casework and appeals across CDBG-DR programs, Indelible's team is prepared to assist in establishing the DCR's appeal resolution infrastructure while delivering high-touch applicant support and rigorous process oversight.

Our approach will include:

Establishing the Appeals Framework	Case Intake and Routing	Claims and Appeals Review Process	Resolution and Quality Assurance
Collaborate with DCR to define clear appeal eligibility criteria, submission windows, escalation procedures, and resolution timelines.	The Case Manager Lead will oversee intake of disputed claims, incomplete applications, or contested eligibility determinations.	The Appeals Review Specialist will conduct independent and unbiased review of applicant claims, cross-referencing program policies, eligibility criteria, and documentation.	Resolved claims will be documented in a centralized case management system, noting the rationale and supporting documentation.
Draft standard operating procedures (SOPs) to align with HUD guidance, including documentation requirements and response formats.	Create a case routing protocol based on case type, priority level, and applicable compliance issues.	Use structured review templates and HUD-recommended checklists to ensure consistency across determinations.	Case Manager Lead and Appeals Review Specialist will conduct joint QA reviews of closed cases to identify trends and improve future determinations.
Provide training to DCR and subrecipient staff on appeals process implementation, decision-making consistency, and documentation best practices.	Maintain clear, respectful, and timely communication with applicants throughout the review and appeal process.		Develop FAQs and applicant guidance resources to minimize confusion and support timely resolutions.
	Provide guidance on supplemental documentation requirements and appeal justification standards.		

Our approach ensures timely response to applicant concerns, thorough documentation, and equitable outcomes that withstand monitoring or audit scrutiny.

Key Personnel Roles



Case Manager Lead

Appeals Review Specialist

Task 6 – Action Plan Development and Amendments

Indelible will support the North Carolina Department of Commerce, Division of Community Revitalization (DCR), by developing and amending CDBG-DR and CDBG-MIT Action Plans that are responsive to the needs of disaster-impacted communities, grounded in data, and fully compliant with HUD regulations and state-specific policies.

Indelible's process is tailored to reflect North Carolina's commitment to equitable recovery, local engagement, and measurable outcomes. Our methodology ensures seamless collaboration with state agencies, local governments, and HUD.

For the North Carolina Department of Commerce (DCR), Indelible will:

❖ **Project Mobilization & Stakeholder Coordination**

- Launch engagement with DCR program leaders to refine scope, confirm regulatory priorities, and establish a shared work plan.
- Set up coordination protocols with other state agencies (e.g., Emergency Management, Environmental Quality, and Housing Finance Agency) to ensure consistency across plans.

❖ **Needs Assessment & Impact Analysis**

- Build upon existing needs assessments and disaster data to document unmet housing, infrastructure, and economic recovery needs.
- Integrate GIS mapping and social vulnerability data specific to impacted counties.
- Ensure data meets HUD and State Environmental Quality review thresholds.

❖ **Drafting the Action Plan**

- The Program Planner / Strategist will lead drafting of Action Plan components, including program design, funding allocations, performance metrics, and compliance mapping.
- Collaborate with policy, legal, and operations staff to ensure program eligibility, national objectives, and duplication of benefits protocols are fully addressed.
- Develop plan components that align with the NC Strategic Recovery Framework and HUD guidance (e.g., 84 FR 1694, 86 FR 569).

❖ **Community Engagement and Public Comment**

- Facilitate meaningful engagement through public hearings (virtual and in-person), targeted outreach to disadvantaged communities, and multilingual materials.
- The Case Manager Lead will channel field-level data and applicant case experiences to ensure the Plan reflects on-the-ground realities and operational feasibility.
- Incorporate public feedback, summarize comments, and document changes in accordance with state and federal guidelines.

❖ **Finalization, Submission, and HUD Liaison**

- Conduct internal QA/QC to ensure completeness and compliance with 24 CFR Part 91 and 2 CFR 200.
- Submit the final Plan and amendments through HUD's DRGR system, with Indelible providing documentation support and resolution of HUD feedback.

❖ **Amendment Management & Ongoing Support**

- Develop and maintain an Amendment Tracker, outlining triggers, workflows, and public comment timelines.
- Support DCR in proactively identifying needs for substantial or non-substantial amendments and facilitating timely submission and approval.

Through this process, Indelible will deliver Action Plans and amendments that are federally compliant, stakeholder-informed, and structured to maximize the impact of CDBG-DR funding in North Carolina.

Key Personnel Roles

Program Planner / Strategist

Case Manager Lead

Task 8 – Program Performance Monitoring and Evaluation

Indelible understands that effective monitoring and evaluation are essential to ensuring program performance, compliance, and accountability. Our team has developed and implemented monitoring frameworks for state and county governments that track project progress, identify risks early, and provide transparent reporting to HUD and local stakeholders. We have utilized dashboards, reporting tools, and risk registers to monitor performance in real time, helping program administrators remain audit-ready and responsive to evolving program needs.

Performance Monitoring Framework



For the North Carolina Department of Commerce (DCR), Indelible will implement a performance monitoring and evaluation framework that emphasizes transparency, accountability, and continuous improvement. Our approach includes:

- ❖ **KPIs and Evaluation Metrics** – Define and monitor key performance indicators (KPIs) such as timeliness of service delivery, fund obligation rates, compliance resolution metrics, and beneficiary outcomes to provide measurable insight into program performance.
 - **Reporting and Corrective Actions** – Document monitoring results, prepare corrective action plans, and follow up with subrecipients and program partners to ensure timely resolution of compliance issues.
- ❖ **Operationalization of Program Plans** – Translate Action Plan and program management frameworks into daily management routines, workflows, and decision-making protocols to ensure consistent execution.
 - **Performance Monitoring Systems** – Track scope, schedule, cost, and quality metrics across all funded activities using project management tools and dashboards to ensure early identification of risks or deviations.
- ❖ **Risk and Issue Management** – Actively monitor risk registers and issue logs, implementing mitigation strategies and corrective actions as needed to maintain program compliance and delivery timelines.
 - **Quality Assurance Reviews** – Conduct ongoing compliance checks and quality reviews to ensure all work meets HUD, CDBG-DR, and state standards.
 - **Stakeholder Engagement in Action** – Hold regular status meetings and workshops with DCR staff, subrecipients, and stakeholders to provide updates, gather feedback, and align on progress and priorities.



Through this disciplined yet adaptable approach, Indelible will ensure that DCR's CDBG-DR programs are continuously evaluated, compliant with federal guidelines, and positioned to deliver efficient, measurable recovery results for North Carolina communities.

Key Personnel Roles

Performance Evaluation Analyst

Data and Reporting Specialist

Task 10 – Audit Readiness and Monitoring Support

Indelible has extensive experience preparing federally funded programs for internal, external, and HUD-led audits. Our team has supported state governments in building systems that ensure records are audit-ready, documentation is accessible, and monitoring reviews withstand regulatory scrutiny. We have helped clients respond quickly to HUD, OIG, and third-party audit requests by maintaining centralized records with version control, role-based access, and time-stamped approvals.

For the North Carolina Department of Commerce (DCR), Indelible will embed audit readiness into daily program operations to minimize risk and ensure compliance. Our approach includes:

Audit-Ready File Management	System Integration for Audit Readiness	Centralized System of Record	Audit Support and Transparency	Subrecipient Audit Readiness	Continuous Compliance Monitoring
Maintain files for all program activities including eligibility, environmental, procurement, financial, and compliance records. Time-stamped, version-controlled, and audit-ready.	Configure and support DRGR with standardized templates, automated validation checks, and version-controlled approvals to align with HUD guidelines.	Establish a centralized environment with role-based access for auditors and leadership, ensuring visibility into supporting documentation, approvals, and compliance checklists.	Provide direct audit support with real-time, audit-ready reports and exports. Ensure records are aligned with HUD, OIG, and state expectations.	Deliver training and technical assistance to subrecipients to strengthen their documentation practices and ensure audit compliance.	Conduct proactive monitoring, document findings, and enforce corrective actions early to reduce risks and maintain compliance.

By embedding audit readiness into every phase of program delivery, Indelible will help DCR maintain transparency, strengthen accountability, ensure successful outcomes in HUD and state monitoring reviews.

Key Personnel roles

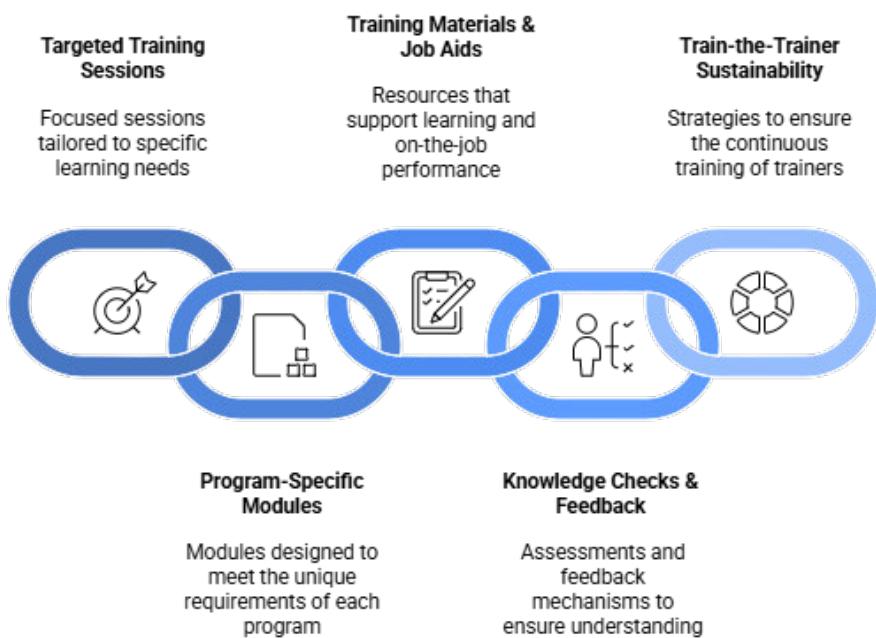
Internal Auditor

Documentation Specialist

Task 12 – Training and Capacity Building

Training and capacity building are essential to ensuring consistent program delivery and long-term sustainability. Our team has designed and delivered training programs for state and county staff, subrecipients, and program partners that translate complex HUD requirements into clear, practical guidance. We have conducted in-person and virtual sessions, developed job aids, and built train-the-trainer models to sustain knowledge transfer beyond initial rollout. Indelible's approach to Task 12 is built on the principle that effective disaster recovery is not only measured by programmatic success, but by the enduring capacity it leaves behind. We understand that to build a resilient recovery infrastructure, DCR staff and subrecipient organizations must be equipped with both knowledge and systems that sustain compliance and performance beyond the life of the grant.

Training Pipeline Structure





Our training model centers around delivering practical, role-specific knowledge that can be immediately applied. Central to this strategy is bridging the gap between regulatory knowledge and operational execution by offering hands-on instruction in HUD program requirements, compliance protocols, and program implementation best practices. Indelible ensures that participants gain not only theoretical understanding but also real-world skills for administering CDBG-DR programs with confidence. This includes exercises tailored to North Carolina-specific scenarios, promoting direct application to the DCR context. The training is further reinforced by curated job aids, SOP checklists, and access to on-demand resources that support ongoing learning.

Beyond training delivery, Indelible supports long-term capacity through embedded task order specific technical assistance. This includes coaching and mentorship to DCR and subrecipient staff during key program phases—such as eligibility determination, procurement execution, or financial reporting—ensuring that learning is reinforced in real time. As a result of this integrated model, DCR will benefit from more knowledgeable staff, stronger subrecipient partners, and well-documented internal procedures that can be reused or adapted for future recovery programs. The sustainability of this approach ensures that North Carolina's disaster recovery infrastructure becomes more agile, efficient, and compliant with each new funding opportunity.

Key Personnel Roles

Training Program Coordinator

Technical Writer

Task 13 – Relocation Program (URA/TRA) Support

Indelible brings specialized experience in the design and administration of relocation programs that ensure compliance with the Uniform Relocation Act (URA), applicable HUD requirements, and state guidelines. Drawing from our leadership in the Elevate Florida Program and the Lee County CDBG-DR Housing Rehabilitation, Reconstruction and Elevation Program, Indelible is distinctively positioned to support the North Carolina Department of Commerce's Division of Community Revitalization (DCR) in both the establishment and execution of compliant and equitable relocation programs.

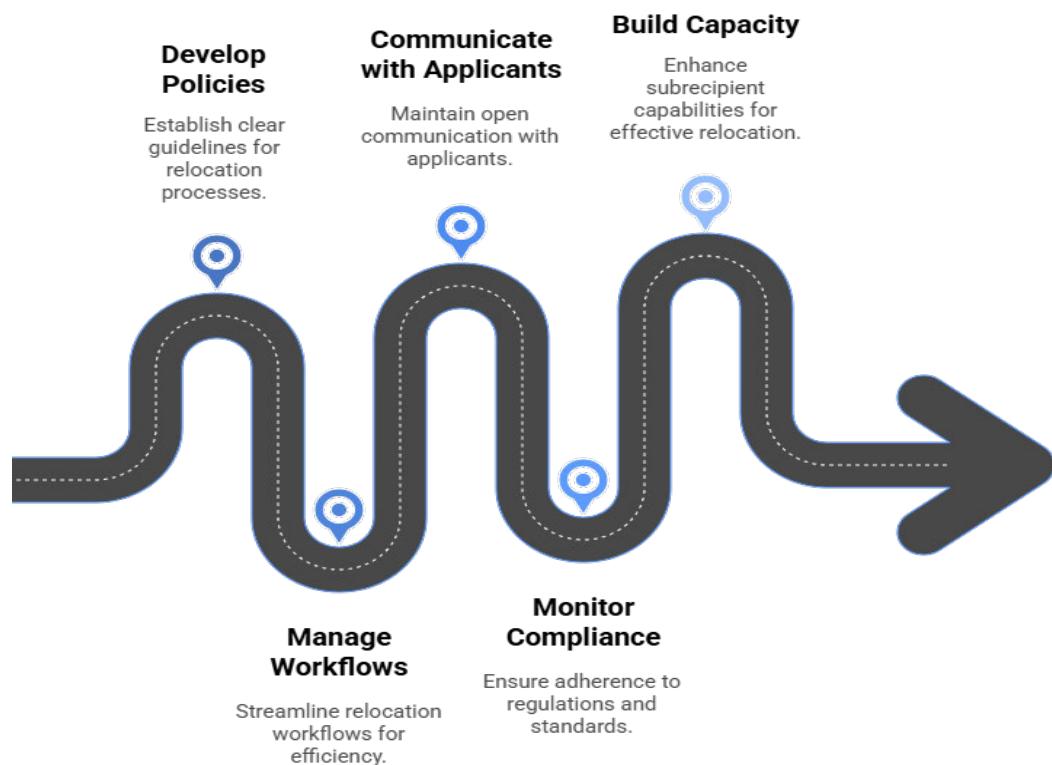
We have the capabilities to deploy subject-matter experts in mitigation, case management, and federal grants administration to lead the development of relocation policies and procedures tailored to the needs of North Carolina households. These policies will reflect technical standards drawn from our work on TRAS and include URA-compliant notification procedures, lease reviews, relocation compensation calculations, and tracking tools anchored in HUD Fair Market Rent and GSA rate schedules.

Housing Relocation Framework

- ❖ Defined documentation protocols, case file standards, and quality assurance measures.

- ❖ Prioritized sustainable practices through integrated community resilience goals, mitigation standards, and housing safety benchmarks.

Case management is central to our relocation delivery model. The Indelible team is proficient in all aspects of applicant interaction from intake, eligibility verification, document collection, benefit calculation, and move coordination. This includes ADA accommodations and language access for socially vulnerable and elderly populations.



In addition, our outreach teams will ensure that potentially displaced residents are informed early and consistently, providing real-time communication, translated materials, and mobile support in transportation-challenged areas. Indelible's proven ability to engage directly with communities, coupled with our technical knowledge of URA compliance, ensures a relocation program that is not only technically sound but also people-centered.

Key Personnel Roles

Relocation Programs Manager

Relocation Compliance Lead

Task 14 – Public Communication and Outreach



Indelible, in partnership with APCO Worldwide, offers a comprehensive communication and outreach approach reflects both a strategic media framework and a community-centered delivery model. We understand that equitable disaster recovery hinges not just on the availability of assistance, but on the clarity, accessibility, and credibility of information delivered to the communities most in need.

Boots-on-the-Ground Outreach Model

Indelible will deploy a locally sourced, culturally competent outreach team to conduct direct engagement activities in disaster-impacted communities across North Carolina. This team will lead efforts such as door-to-door canvassing, high-traffic area engagement, and mobile outreach units serving remote or transportation-challenged areas. Our outreach staff will use LTE-enabled tablets for real-time intake, data capture, and appointment setting, ensuring every community interaction is logged and monitored for responsiveness. In partnership with DCR, we will prioritize outreach in low- to moderate-income (LMI) neighborhoods, areas with limited internet access, and historically underserved populations. Our team will also staff community events, resource fairs, and service hubs such as libraries and faith-based centers to maximize visibility.

Stakeholder Collaboration and Trusted Messenger Engagement

We recognize the value of partnership with trusted local voices. Indelible will engage community-based organizations, civic groups, and faith leaders who hold deep trust within their communities. These relationships will facilitate co-hosted outreach events, co-branded materials, and expanded access to vulnerable populations. Our continued presence in post-disaster environments ensures continuity and commitment, particularly as recovery programs evolve into long-term resilience initiatives.

Strategic Communication and Media Planning

APCO Worldwide will lead Task 14 – Public Communication and Outreach, bringing nearly 40 years of global communications leadership and more than 17 years of direct experience serving North Carolina agencies, universities, and nonprofits. APCO’s Raleigh-based team of 50 professionals has successfully executed statewide campaigns for NCWorks, the NC Department of Justice, and the NC Community College System. Their expertise includes:

- ❖ Crisis communications and rapid response, demonstrated during Hurricane Helene when APCO pivoted statewide outreach campaigns in real time
- ❖ Statewide media campaigns that deliver measurable impact, such as the College for North Carolina “Countdown to College” campaign (42,000 applications; 13M+ impressions)
- ❖ Policy-focused public education campaigns, including the NC DOJ’s Sexual Assault Resources and Robocall Awareness initiatives

APCO will design and manage the comprehensive Communications and Outreach Plan, covering timelines, audience segmentation, messaging frameworks, and media engagement protocols. They will oversee media buying, performance tracking, and continuous optimization to maximize



reach and effectiveness, while ensuring all content is accessible, multilingual, and aligned with DCR's objectives.

Media Engagement and Narrative Control

As part of APCO's statewide strategy, the team will lead proactive media engagement with local, regional, and statewide outlets to ensure accurate, timely coverage of CDBG-DR programs. APCO will prepare press releases, media kits, and coordinate press at events, while Indelible will support by amplifying these efforts through grassroots storytelling and resident testimonials that highlight transparency, equity, and community impact.

Key Personnel Roles

Public Information Officer

Technical Writer

Task 15 – Grant Management

By combining disciplined grant administration, robust compliance frameworks, and real-time technical support, Indelible ensures that all CDBG-DR/MIT funds administered through DCR are managed with the highest levels of accountability, efficiency, and impact. Our patented methods of end-to-end grant management solution for the Division of Community Revitalization (DCR), are grounded in best practices and informed by our successful administration of the \$4.1 billion Texas BEAD and Texas Match Programs. Our approach safeguards transparency, equity, and strict regulatory compliance throughout the grant lifecycle—spanning application intake, award processing, subrecipient oversight, and final closeout.

In the initial phases, our team will align all grant management operations with HUD regulations and state-specific mandates, including compliance with 2 CFR Part 200. Drawing from our experience, we will deployed custom technology (program portal) to manage applicants, streamline workflows, enhance applicant support, and ensure audit readiness. Our Grant Manager will oversee the development and integration of secure, user-friendly systems that support eligibility screening, application review, contract execution, and fund disbursement.

Indelible has the capability and know-how to manage the full grant award process, including drafting and executing subrecipient agreements that meet HUD guidance and DCR standards. In establishing evaluation protocols, we enable timely and equitable reviews of subrecipient documentation, while maintaining rigorous documentation control to support defensible funding decisions. Additionally, a dedicated Financial Compliance Specialist will implement a structured oversight framework, tracking both programmatic and financial performance to ensure proper use of funds and timely deliverables.

Financial compliance

Our team will monitor subgrantee expenditures against approved activities and validate reimbursement requests through document verification and cost-reasonableness checks. Our

systems will integrate real-time dashboards to track performance and highlight any discrepancies for corrective action. We will implement a centralized project management system that maintains comprehensive, version-controlled records aligned with HUD's monitoring expectations. Our tailored QA/QC protocols will be embedded throughout the grant management process, from application intake through award and reimbursement, to ensure each grant file is fully supported by verifiable, audit-ready documentation. This disciplined quality control approach allows DCR to respond confidently to state and federal audits and ensures uninterrupted program execution even amidst evolving regulatory guidance.

In parallel, we will deliver capacity-building services to DCR and its subrecipients; including hands-on technical assistance, training modules on grants compliance and documentation standards, help desk operations, and the development of reference tools such as FAQs and compliance checklists. Our previous engagements demonstrate our ability to adapt to shifting federal requirements while maintaining momentum, and we bring the same agility and commitment to North Carolina's CDBG-DR and CDBG-MIT efforts.

Key Personnel Roles

Grant Manager / CDBG-DR Specialist

Financial Compliance Specialist

Task 16 – Technical Systems & Project Management

Indelible brings extensive experience in deploying and managing technical systems that ensure operational efficiency, regulatory compliance, and data transparency for federally funded programs, particularly those under HUD's CDBG-DR and CDBG-MIT frameworks. Our approach to Task 16 will provide DCR with robust tools and structured project management to support the full program lifecycle—from intake to audit closeout.

System Development and Integration

Indelible will configure, customize, and maintain case management and compliance systems that meet HUD and State requirements while remaining adaptable to DCR's evolving needs. Our team will:

- **Configure centralized case management and compliance portals** to track applicant eligibility, environmental reviews, DOB, procurement actions, and expenditure timelines.
- **Integrate subrecipient and contractor data** into dynamic dashboards and reports that provide real-time visibility across all program components.
- **Automate workflows and compliance checkpoints** to ensure timely documentation, procurement integrity, and prevention of ineligible payments.
- **Establish system interoperability** to accommodate DRGR, GIS tools, and North Carolina's financial systems where feasible.

Program Management Plan (PMP)



Indelible will develop a comprehensive Program Management Plan (PMP) aligned with HUD standards and DCR's recovery goals. The PMP will establish governance, performance measurement, and operational control mechanisms. Key components will include:

- **Policy and Procedure Development:** Aligned with 2 CFR Part 200, HUD notices, and North Carolina statutes. Our *Policy & Compliance Analyst* will lead updates as regulatory guidance evolves.
- **Program Design Support:** Including intake workflows, eligibility criteria, and budget frameworks tied to unmet needs identified in the Action Plan.
- **Document Development:** Draft NOFAs, RFPs, and Subrecipient Agreements that meet HUD and State procurement requirements.
- **Implementation Planning:** Phased roll-out strategies that prioritize housing, infrastructure, and economic revitalization programs.

Execution and Oversight

Upon approval of the PMP, Indelible will operationalize program management activities and monitor progress across all performance domains. This will include:

- **Operationalization of PMP:** Daily workflows, checklists, and decision-making protocols embedded into systems and team routines.
- **Performance Monitoring:** Use dashboards to track scope, schedule, budget, and quality; flagging risks in real time.
- **Risk & Change Management:** Maintain risk registers, issue logs, and change control procedures to address disruptions proactively.
- **Resource Allocation:** Adjust staffing levels and technical support to meet evolving workload and compliance needs.
- **Stakeholder Coordination:** Host regular coordination meetings and reporting cycles with DCR leadership, HUD, and local partners.

Training and Capacity Building

A key success factor in long-term system sustainability is user competence. Indelible will:

- Deliver tailored training programs for DCR and subrecipient staff.
- Provide technical manuals, process guides, and train-the-trainer sessions.
- Offer ongoing help desk and surge support as new modules or updates are introduced.

By combining technical systems design with disciplined project management and a deep understanding of HUD program requirements, Indelible will enable the Division of Community Investment to deliver CDBG-DR and CDBG-MIT programs with greater efficiency, transparency, and impact.

Key Personnel Roles

Project Manager

Data and Reporting Specialist



Moving North Carolina Forward—With Experience That Delivers

North Carolina deserves a partner who combines deep federal program knowledge with practical, field-tested execution—and Team Indelible is that partner. With a proven track record delivering CDBG-DR services across complex, multi-jurisdictional environments, we stand ready to bring immediate capacity, trusted systems, and locally focused insight to support DCR. Our team understands the urgency, compliance requirements, and human impact of disaster recovery, and we're prepared to deliver audit-ready, equity-driven results from day one. We're not learning this work—we've lived it. Let's build North Carolina's recovery together, with speed, transparency, and the community at the center.

Appendix A: Resumes



Specialization

Advisory, Risk Analysis, Grants Management, Disaster Recovery, Internal Controls, Emergency Management and Compliance

Past Performance

- Florida Division of Emergency Management
- Miami-Dade County Emergency Assistance
- Kentucky Housing Corporation
- Georgia Department of Community Affairs
- Florida Department of Economic Opportunity
- Alabama Housing Finance Authority
- Texas Workforce Commission
- Florida Commerce

Education

- Master of Business Administration, Florida Agricultural and Mechanical University.
- Bachelor of Science, Administration, Florida Agricultural and Mechanical University

Aarika Rowells, MBA

Aarika is an experienced advisory consultant specializing in State and Local Government, and private sector entities operating in highly regulated industries. Her expertise encompasses risk identification, risk control, and risk mitigation, serving in an advisory capacity for governmental agencies. Her intuitive understanding of disaster recovery and grants management has been instrumental in ensuring successful compliance and risk management for millions of dollars in working with state and local agencies within the public sector to augment risk assessments. Additionally, she has demonstrated effective communication with fellow professionals, the ability to articulate ethical and social principles, and has showcased leadership and interpersonal skills within a team environment.

Professional & Industry Experience

Risk Mitigation and Compliance Management

Aarika fulfilled the role of Quality Assurance in the Texas Workforce Commission Childcare Relief Fund. This involvement entailed overseeing the proper utilization of funds by 2,700 Childcare Providers across the state of Texas. In this capacity, she contributed to training and onboarding efforts to ensure a comprehensive understanding of relevant compliance areas. Furthermore, Aarika conducted risk assessments and quality assurance checks, consistently offering guidance to the team for the establishment of project controls and compliance benchmarks.

Integrity Monitoring and Quality Control – Rental Assistance

Aarika has led multiple Emergency Rental Assistance Program (ERAP) engagements, including work with Miami-Dade County, Kentucky Housing Corporation, Georgia, and Albuquerque. She managed operations, ensured 2 CFR 200 compliance, and used systems such as Podio, Backoffice, and CARA to track disbursements and conduct performance analyses. Under her leadership, housing processors maintained high efficiency and quality while allocating over \$5M in rental and utility assistance to prevent evictions during the pandemic.

Grants Management – Disaster Recovery

Aarika played a critical role overseeing consulting projects for Florida's Division of Emergency Management, managing FEMA Public Assistance grants for Hurricanes Michael and Irma. She navigated complex federal and state regulations for multiple municipalities to ensure timely, accurate grant delivery. Aarika developed oversight processes to strengthen risk controls and streamline compliance procedures, serving as a lead validator on large-scale recovery efforts. Her responsibilities included project worksheet approvals, subrecipient performance evaluations, reimbursement request processing, compliance reviews, and formal project closeouts—ensuring audit-ready documentation and sustained program integrity.

Outreach and Case Management – CDBG-DR HRRP

As Outreach Manager for Florida Commerce's Hurricane Ian CDBG-DR Housing Repair and Replacement Program (HRRP), Aarika led the state's outreach team, overseeing staffing, event planning, and community engagement for low-to-moderate income populations. She coordinated outreach events, built partnerships with government agencies and community organizations, and implemented the statewide outreach plan. Through diligent reporting and resource management, she ensured transparency, accountability, and broad participation in the program.

Concurrently, as a Case Manager for the Hurricane Irma CDBG-DR HRRP, she guided homeowners through the Rebuild Florida program, reviewing eligibility and documentation, coordinating with contractors, inspectors, and quality control staff, and resolving applicant concerns. She maintained detailed case files, communicated program policies, and confirmed project completions and applicant satisfaction.



ALFRED BATTLE

Alfred Battle III is a Senior Associate with expertise in technical writing, program documentation, and civic engagement. He has supported federally funded housing and disaster recovery programs, developing policies, procedures, training content, and applicant-facing materials that ensure compliance with HUD and state requirements. His experience includes supervising Miami-Dade's Emergency Rental Assistance Program, managing the Workforce Housing Incentive Program, and supporting FloridaCommerce's Hurricane Ian HRRP. Mr. Battle's background in legislative analysis and community outreach strengthens his ability to translate complex requirements into clear, accessible guidance.

Specialization

Program Documentation, Project Management, Communication Strategies, Community Relations, Civic Engagement, Policy Development, SOP Creation, Training Materials

Past Performance

- City of Miami Gardens
- Miami-Dade WHIP
- Miami-Dade ERAP
- Rebuild Florida HRRP

Education

- Bachelor of Science, Political Science, Jacksonville University
- Master of Public Administration

Professional & Industry Experience

Duplication of Benefits Analyst & Outreach Specialist – FloridaCommerce Rebuild Florida HRRP (Hurricane Ian)

Mr. Battle currently serves as a Duplication of Benefits (DOB) Analyst and Outreach Specialist for the Rebuild Florida Housing Repair and Replacement Program (HRRP), funded by HUD and administered by FloridaCommerce. In this role, he engages directly with communities across 20 counties to explain program guidelines, answer applicant questions, and build awareness of available assistance. He develops applicant-facing materials and delivers outreach sessions that translate complex HUD requirements into clear, accessible information for homeowners and stakeholders.

On the compliance side, Mr. Battle conducts detailed reviews of applications using Canopy and other data systems to identify potential duplication of benefits, ensuring compliance with federal regulations and protecting program integrity. He applies analytical processing to validate documentation and safeguard against disallowed costs. By combining outreach and compliance, Mr. Battle strengthens program transparency, supports defensible eligibility determinations, and contributes to the timely delivery of housing assistance for families impacted by Hurricane Ian.

Program Supervisor – Miami-Dade Emergency Rental Assistance Program (ERAP)

Mr. Battle led the rollout and management of ERAP, a HUD-funded initiative critical to stabilizing housing during the COVID-19 pandemic. He tailored program processes to community needs, developed tracking systems, and collaborated with agencies and non-profits to ensure compliance and transparency. His leadership in streamlining applications, coordinating teams, and fostering stakeholder engagement prevented evictions, maintained housing stability, and mitigated economic hardships for Miami-Dade residents.

Program Supervisor – Miami-Dade Workforce Housing Incentive Program (WHIP)

Mr. Battle oversaw daily operations of the WHIP pilot program, supporting affordable housing for households at 30–140% AMI. He reviewed and approved applications, ensured eligibility compliance, and produced program documentation and reports. He liaised with landlords and county officials to maintain program standards, with approved units receiving \$2,000 per application.

Legislative Analyst & Civic Engagement Liaison – City of Miami Gardens

As a Legislative Analyst for the Councilman of Seat 6 At Large for the City of Miami Gardens, Alfred consistently manages cross-departmental projects, providing valuable insights through data analysis, research, and benchmarking. His ability to collaborate across city departments and with local leaders has enhanced policy development and decision-making for city leadership.



BEN LEE

Benjamin has over 6 years of experience in advisory services and auditing for federal, state, and local government agencies. His professional background includes delivering solutions for regulatory compliance needs, internal auditing, and internal controls for clients. Ben has expertise in leading engagement teams to develop ongoing validation and procedural regulations for the Florida's Division of Emergency Management.

Specialization

Advisory and Audit, Grants Management, Disaster Recovery, Compliance, Project Closeout

Past Performance

- Florida Division of Emergency Management (FDEM)

Education

- Bachelor of Science, Information Systems - Kennesaw State University

Professional & Industry Experience

Project Manager – FEMA Public Assistance (PA) Recovery Operations, Florida Division of Emergency Management (FDEM) – Hurricane Michael (DR-4399)

Benjamin Lee directed all recovery operations under task orders for federally declared disasters in Florida, providing expert management consulting in alignment with 2 CFR 200 and FEMA PA regulations. He served as the primary liaison with the Port Authority, Emergency Operations Center (EOC), and applicant leadership, ensuring timely mobilization of teams within 24 hours.

Benjamin oversaw all phases of FEMA PA project management, including quarterly reporting, project amendments, time extensions, closeouts, accuracy reviews, and documentation migration. He led a multi-disciplinary team in process and control reviews, procurement compliance assessments for county and school board projects, and coordinated applicant communications to maintain transparency and alignment with program requirements.

As Team Lead, Benjamin implemented performance tracking systems and operational controls, resulting in over \$400 million reimbursed to school districts and local governments statewide. For DR-4399 projects, he verified vendor eligibility, conducted cost-benefit analyses, and prepared detailed cost estimates to identify the most efficient service and material options.

Currently, Benjamin contributes to PMO initiatives supporting risk assessment, grant compliance, and operational readiness, with a focus on continuous improvement in efficiency, resource allocation, and training. His leadership ensures FEMA-compliant grant program delivery, strengthens stakeholder relationships, and drives successful recovery outcomes for complex disaster operations.



Brianna Beynart, MA, PMP

Brianna is a detail-oriented and results-driven resource with a diverse background in contracts, grants, programs, procurement, and marketing management across various industries, including information technology, telecommunications, emergency management, construction, and aviation.

Professional & Industry Experience

Site Lead, Disaster Nutrition Assistance Program, (D-SNAP)

As D-SNAP site lead, Brianna directed staffing allocations for DCF application events. She supervised teams handling traffic coordination, customer support for general and ADA populations, and informational services. She led training on DSAP processes, managed scheduling, and optimized operations through resource adjustments to meet event demands.

PMO Lead, Division of Telecommunications

Brianna served as the PMO Lead for the Division of Telecommunications, managing contracts, grants, and projects for public safety and telecommunications systems, including SLERS, SUNCOM, and the 411 Call Center. She ensured compliance with federal and state funding requirements, maintained 60GG-compliant documentation, and oversaw legislative reporting and project deliverables from initiation to closeout.

Project Manager, Department of Management Services

In the Department of Management Services Strategic Planning Office, Brianna managed high-priority initiatives, facilitating meetings with executive and division leadership. She led capital construction efforts, IT automation projects, and performance dashboard development. Brianna also implemented process improvements, procedural changes, and workforce automations to optimize enterprise operations.

Program Manager, Division of Emergency Management

As Program Manager, Brianna supervised teams managing Hurricane Shelter Retrofit and Hurricane Loss Mitigation grants, the Tallahassee Community College Mobile Home Tie-Down Program, and research projects with Florida International University's Hurricane Research Center. She monitored project performance metrics, provided detailed reports to leadership on program outcomes and grant utilization, and ensured compliance with funding requirements. Brianna ensured that projects adhered to mitigation standards, Florida Building Code requirements, and state and federal grant requirements.

Grant Manager, Division of Emergency Management

Brianna was a grant manager for the Residential Construction Mitigation Program, managing schedules, budgets, and scopes of work while coordinating with counties, municipalities, nonprofits, state universities, colleges, and for-profit agencies. She facilitated state grant workshops and provided technical assistance to applicants and recipients, streamlining application approvals and improving timelines. Brianna ensured the timely execution of contracts, reports, and payment requests, conducting on-site monitoring to verify compliance with federal regulations, grant terms, building codes, and mitigation standards.

Specialization

Project Management, Program Administration, Grant and Contract Management, Emergency Response,

Past Performance

- Florida Department of Management Services
- Florida Department of Health
- Florida Division of

Education

- Bachelor of Science, Social Services – Florida State University
- Master of Arts, Government Studies – John Hopkins University
- Project Management Professional (PMP)
- Disciplined Agile Scrum Master (DASM)
- Florida Certified Contract Manager (FCCM)
- FEMA Professional Development Series
- Criminal Justice Information Services Level 4 Security
- Certificate in Emergency Management and Homeland Security



CARLIN DANIELS

Carlin is an experienced compliance management professional. He has a background in risk identification, risk control, and risk mitigation. He has been a critical team member on multiple engagements focused on disaster recovery and grants management. During those engagements, he was responsible for overseeing and ensuring compliance and risk management of millions of dollars in public assistance funds.

Specialization

Advisory Consulting for Federal, State, and local Governments, Internal Audit and Enterprise Risk

Past Performance

- New York Department of Health
- New York City School Authority

Education

- Master of Business Administration – University of Central Florida
- Bachelor of Science, Administration – Bethune Cookman University
- Lean Six Sigma White Belt Certified
- Certified Project Management Essentials

Professional & Industry Experience

Auditing & Compliance

Consultant, NY DOH Home Care Audits

Carlin's auditing expertise was key to the success of the New York City Department of Health's (DOH) Home Care Audits. As an Associate Auditor with KPMG, he played a critical role in ensuring that home care agencies across New York City adhered to stringent financial documentation requirements. Carlin's approach to auditing combined thorough data analysis with a keen understanding of basic accounting principles, allowing him to identify discrepancies and ensure accurate reporting.

His responsibilities included reviewing financial records, conducting audit procedures, and liaising with agency representatives to clarify complex issues. Carlin's keen analytical skills and attention to detail resulted in the successful completion of internal audits that provided actionable insights for the NYC DOH. His work not only helped improve financial transparency but also supported the adjustment of reimbursement rates for the agencies involved, contributing to a more equitable and efficient healthcare system.

Auditing & Compliance

Consultant, New York City School Construction Authority

Carlin's work with the New York City School Construction Authority (SCA) has cemented his reputation as a risk management expert. As part of KPMG's audit team, he provided critical support to the SCA's Enterprise Risk Management initiatives, working closely with the Risk Oversight Committee (ROC) to assess and mitigate potential risks that could impact the agency's construction projects. Carlin's contributions included developing comprehensive risk mitigation plans, facilitating ROC meetings, and creating strategic tools such as risk matrices, charts, and presentations that helped streamline decision-making processes.

His ability to distill complex data into actionable insights enabled the SCA to implement effective risk management protocols that enhanced the safety and efficiency of school construction projects throughout New York City. Carlin's expertise in risk assessment, strategic planning, and data analysis has made him an invaluable asset in the SCA's efforts to safeguard its projects from unforeseen challenges.



CHRISTOPHER JOHNSON

Christopher Johnson is a disaster recovery and housing stability professional with expertise in community engagement, stakeholder communication, and applicant support. He has supported federally funded programs, including FEMA Individual Assistance and Florida's Homeowner Assistance Fund (HAF), directly assisting survivors across thirteen disasters. Christopher has led teams, enhanced case management efficiency, and conducted outreach to vulnerable populations, including individuals at risk of homelessness.

Specialization

Disaster Recovery,
Stakeholder Engagement,
Community Outreach,
Applicant Support, Housing
Stability, Homelessness
Prevention, FEMA Individual
Assistance, Compliance
Review, Team Supervision,
Process Improvement

Past Performance

- Florida Department of Commerce
- Federal Emergency Management Agency

Education

- Master of Professional Studies, Emergency and Disaster Management – Georgetown University
- Bachelor of Business Administration – Stephen F Austin State University

Professional & Industry Experience

Supervisor, Homeowner Assistance Fund (HAF)

Christopher served as Engagement Supervisor for the Florida Department of Commerce's Homeowner Assistance Fund (HAF) program, supporting homeowners impacted by the COVID-19 pandemic. He managed a team of four case managers, provided regular training and performance feedback, and reviewed applications to ensure eligibility, accuracy, and compliance. Christopher implemented a biweekly data collection and reporting system across forty team members, significantly improving case processing efficiency. His contributions streamlined operations while maintaining high standards for applicant service and program transparency, directly supporting state efforts to stabilize homeownership for vulnerable Floridians post-pandemic.

Program Specialist, Rapid Rehousing & Homeless Prevention Programs

Christopher supported individuals and families at risk of homelessness by guiding them through housing stabilization plans and recovery pathways. He facilitated discussions with participants on employment readiness, mental health, financial management, and substance abuse recovery. Christopher ensured applicants met eligibility requirements and provided ongoing compliance support throughout program participation. His outreach efforts fostered long-term stability and improved outcomes for high-risk populations. His community-first approach positioned him as a trusted advocate for clients navigating public assistance systems.

Applicant Specialist, FEMA Individual Assistance – Multiple Disasters

Christopher served as an Applicant Specialist with the Federal Emergency Management Agency (FEMA), supporting disaster survivors across thirteen federally declared events. He assisted individuals and families with completing applications, verifying eligibility, and accessing relief services. Christopher's empathetic communication and technical knowledge ensured clear guidance through complex disaster aid processes. His frontline experience has made him highly skilled at engaging distressed populations and managing sensitive information with care and professionalism, helping communities recover more effectively during periods of crisis and uncertainty.



DEANNA POLAND-STEMOCK

DeAnna Poland-Stemock has over 10 years of experience in disaster recovery and emergency management. She has an extensive background in managing large-scale projects for government grant funding. She has overseen grant management programs for post-disaster housing repair and replacement. DeAnna has been recognized by FEMA on multiple occasions for her excellence in the field, and was previously named FEMA's Employee of the Year.

Specialization

Disaster Recovery, Grants Management, Emergency Management Services, Public Private Partnerships.

Past Performance

- Florida Division of Emergency Management (FDEM)
- Florida Department of Commerce

Education

- Florida Certified Contract Manager
- NIMS Compliant Trained
- Certified Federal Grants Management Training
- FEMA Contracting Officer's Technical Representatives
- Access Leadership Program

Professional & Industry Experience

Disaster Recovery - Preparedness

Process Consultant, FL DEM Process Improvement

FL DEM workstreams encompass IT, HR, Mitigation and Recovery Bureau efforts, focusing on business process documentation and discovery preparation, including the creation of Business Requirement Documents. This involved developing a Business Case Intake Form and leveraging the Bureau of Salesforce Administrators to support the DEMES system, ensuring operational efficiency.

By collaborating on the development and refinement of workstream process flows and narratives for Fleet, IT, HR, Mitigation, and Recovery, operations were streamlined with a more efficient and clear process implemented companywide. DeAnne utilized the Business Requirements Document (BRD), which helped maintain the alignment across the organizational, ensuring that all stakeholders were on the same page regarding project objectives and deliverables.

Access management and role crosswalks improved the allocation of resources, ensuring that the right people had the appropriate access, and improving productivity. The development of the Systems Development Life Cycle and Business Case Intake form provided a more structured approach to system development, resulted in a simplified intake process, reduced delays, it helped prioritize projects, ensure better quality control, and a more effective project management within the division. Supporting the BSAs resulted in enhanced system performance, fewer technical issues, and smoother implementation of Salesforce-based solutions.

Past Work Experience

CDBG-DR & Grants Management

DeAnna's tenure at the Department of Commerce's Office of Long-Term Resiliency saw her overseeing the management of CDBG-DR funding, totaling 1.3 billion dollars, aimed at housing repair following Hurricanes Irma, Michael, and Ian. Her responsibilities included supervising audits, staff, and ensuring compliance with state guidelines and contracts, contributing significantly to the restoration efforts in affected communities. DeAnna's leadership ensured efficient allocation of resources and timely implementation of recovery projects, fostering resilience and stability in areas impacted by natural disasters.

During her time at BRACE, DeAnna demonstrated her adeptness in managing grants, supervising personnel, and cultivating partnerships to bolster disaster preparedness initiatives, laying the groundwork for resilient communities in the face of adversity. Through her strategic vision and collaborative spirit, DeAnna facilitated the development and implementation of innovative programs and initiatives aimed at enhancing community resilience and disaster response capabilities.



DREW WINTERS

Drew Winters has more than 19 years of experience in government regulatory practice, grants management, and disaster recovery. He serves as Indelible's Emergency Management solution lead, responsible for the strategic vision and execution of emergency response services. Drew provides oversight to ensure scalable, custom solutions are implemented across all emergency management programs. As former Director of Florida's Office of Long-Term Resiliency, he managed over \$2.2 billion in HUD disaster recovery and mitigation funding, bringing expertise in FEMA coordination, CDBG-DR implementation, policy development, and regulatory compliance.

Specialization

Disaster Recovery, Government Regulatory Practice, Grants Management, Program Implementation, Budget Oversight, Process Improvement, Legislative and Legal Analysis, Strategic Planning, Policy Development

Past Performance

- Office of Long-Term Resiliency (Rebuild Florida), Florida Department of Commerce
- Florida Department of Business and Professional Regulation

Education

- Juris Doctorate – Florida State University, School of Law
- Bachelor of Science, Criminal Justice – University of Central Florida
- Florida Bar License - 2003

Professional & Industry Experience

Indelible Human Services Lead

As the solution lead for Indelible's Human Services vertical, Drew is responsible for the operational control of Indelible's emergency response and disaster recovery program services. He oversees direct client delivery at the state, county, and local levels, ensuring exemplary client and customer service for multiple natural disasters and pandemic-era recovery programs. Drew's leadership encompasses program implementation, project management, and direct on-site client services for state and local agencies, including FDEM, DCF, and Lee County Emergency Management. Recent projects include a specialized focus on Hurricane Ian recovery services, such as disaster recovery center operations, Lee County disaster assistance and outreach team deployment, DSAP site staff augmentation, and the on-site implementation of community service operations.

Director, Office of Long-Term Resiliency – Florida Department of Commerce

Drew served as the Director of the Office of Long-Term Resiliency (Disaster Recovery) for Florida's Department of Commerce (formerly the Department of Economic Opportunity), where he oversaw the administration of more than \$2.2 billion in HUD Community Development Block Grant-Disaster Recovery (CDBG-DR) and Mitigation (CDBG-MIT) funding for the State of Florida. As Director, he was responsible for program administration, staffing, and oversight, with a focus on federal grant compliance, timely grant expenditures, and local government coordination. Drew helped oversee the creation and administration of the Rebuild Florida Housing Program, which provides home repair, replacement, and reconstruction services to low- and moderate-income families whose homes were damaged or destroyed by disasters. Program oversight required significant budget management, contract procurement, vendor oversight, and coordination with both internal and external stakeholders to enhance program efficiency, adopt public policies, and ensure operational success.



GRAYSON DUNN

Grayson Dunn has more than 10 years of experience in federally funded programs, specializing in disaster recovery, compliance oversight, and project management. He has led quality assurance, applicant support, and escalation resolution across multiple programs, including FEMA PA, CDBG-DR, and HAF. As a Project Manager, Grayson ensures task orders are executed efficiently, in full compliance with federal and state requirements, and with clear coordination among clients and stakeholders. Known for proactive leadership, technical expertise, and cross-functional collaboration, he advances program integrity while enhancing operational performance and communication with government partners such as the Port Authority.

Specialization

Disaster Recovery, FEMA
Public Assistance, CDBG-DR,
Program Management, Case
Management, Financial
Compliance, Process
Improvement, Federal Grants,
QA/QC Monitoring, Escalation
Resolution, Regulatory
Oversight

Past Performance

- Alabama Department of Economic and Community Affairs (ADECA)
- Florida Division of Emergency Management (FDEM)
- Florida Department of Commerce

Education

- Master of Business Administration – Florida State University
- Bachelor of Science, Applied Economics – Florida State University

Professional & Industry Experience

Engagement Manager, AL ADECA Community Development Block Grant Disaster Recovery

Grayson served as Engagement Manager for Alabama's CDBG-DR program through the Alabama Department of Economic and Community Affairs (ADECA), leading the Home Recovery Alabama Program in partnership with Horne LLP. He supervised a team of Duplication of Benefits Analysts and Case Managers supporting homeowners impacted by Hurricanes Sally and Zeta. His leadership ensured the timely and compliant distribution of federal funds, helping communities rebuild after disaster. Grayson streamlined operations and maintained full alignment with federal and state recovery protocols. His ability to manage complex program requirements and team coordination positioned him as a trusted expert in disaster recovery management.

QC Lead, Florida Division of Emergency Management (FDEM) – FEMA PA

Grayson leads compliance and quality assurance efforts for FEMA Public Assistance recovery programs under the Florida Division of Emergency Management (FDEM). His work includes reviewing project documentation, conducting quality control checks, and advising on eligibility, scope of work, and reimbursements. He provides technical assistance to applicants statewide, ensuring adherence to FEMA, state, and local regulations. His oversight has contributed to the successful auditing and validation of numerous recovery projects. With deep knowledge of FEMA processes, he ensures programs are both audit-ready and operationally efficient.

Escalations Lead, Florida Department of Commerce – Homeowner Assistance Fund (HAF)

As Escalations Lead for the Homeowner Assistance Fund, Grayson directed a team resolving complex applicant cases requiring senior-level review. He analyzed escalation data, produced detailed compliance reports, and communicated insights to both the client and internal leadership. He also played a key role in training and onboarding new staff, ensuring all team members were proficient in program policies and procedures. His leadership supported timely and accurate issue resolution while safeguarding program integrity and ensuring strong client satisfaction.

Team Lead, Florida DEO – Pandemic First Responders Fund

Grayson served as Team Lead for Florida's Pandemic First Responders Payment Program, managing technical assistance and outreach statewide. He oversaw submissions from eligible entities, ensuring accuracy, compliance, and timely processing of allowable responders. His leadership strengthened program participation and stakeholder engagement through proactive communication and support. He provided guidance on complex regulatory requirements to ensure successful fund disbursement. His efforts were critical to delivering relief efficiently while maintaining compliance with federal and state standards.



Joanne Peters Denny

Joanne has over 20 years of experience developing clear, accessible documentation, policies, and SOPs. She specializes in simplifying complex regulations, compliance communications, and creating user-focused materials for federal, state, and higher education programs.

Specialization

Technical writing,
Documentation development,
Policy drafting, SOP creation,
Compliance communications.

Past Performance

- APCO Worldwide
- The University of North Carolina at Chapel Hill
- U.S. Department of Agriculture

Education

- Bachelor of Arts, Journalism and Mass Communication-University of North Carolina at Chapel Hill
- Bachelor of Arts, Political Science-University of North Carolina at Chapel Hill

Professional & Industry Experience

APCO

Director, Raleigh, N.C.

- Lead clients in strengthening their corporate reputation, mitigating issues and crises, and developing strategies to reach public affairs goals.
- Specialize in large, complex, regulated organizations.
- Oversee APCO's largest global account, managing multi-million-dollar budgets and developing and leading high-performing, complex teams.

The University of North Carolina at Chapel Hill

Director of Media Relations, Chapel Hill, N.C.

- Oversaw all media relations efforts for the University, serving as a senior spokesperson and managing a team of eight.
- Led message strategy on initiatives and issues, coordinating across University leaders and entities.
- Developed communications strategies to position the University as the leading global public research university, and to highlight the University's service to the state to maintain stakeholder and taxpayer support.
- Provided counsel and media training to the Chancellor and senior University officials.
- Protected the University's reputation by developing communications efforts to manage high-profile issues such as the COVID-19 pandemic, athletics, Title IX, race and diversity, personnel, and emergency situations.
- Developed messaging and communications strategies to support public health messaging during the COVID-19 pandemic to build awareness for the University's prevention efforts.

U.S. Department of Agriculture

Deputy Director of the Office of Communications, Washington, D.C.

- Served as a senior leader for a federal department with more than 100,000 employees and a \$139 billion budget, responsible for strategic communications planning, media relations, and issues management.
- Managed a team of 12 and worked with communicators across USDA's 17 agencies to ensure alignment with Department priorities.
- Developed communications strategies to support major legislative priorities, including securing a \$700 million increase to the U.S. Forest Service budget and defeating opposition to the reauthorization of The Healthy Hunger Free Kids Act.
- Created multi-platform communications plans to demonstrate the value of USDA's work to stakeholders and the public.
- Served as communications lead for the White House Rural America Opioid Initiative, crafting a media strategy that led to more than 100 unique story and editorial placements in national and regional media outlets, including a front-page profile in the Washington Post, and Congressional approval of the Comprehensive Addiction and Recovery Act.
- Provided counsel to Secretary Vilsack and led communications planning for his travel and events, including high-profile international engagements.



JOHNWAYNE REID

Johnwayne Reid has over 10 years of experience providing professional advisory services to government agencies. He is responsible for ensuring that delivery efforts are executed seamlessly, and that client's expectations and business requirements are exceeded. He has a proven track record of navigating complex regulatory environments to achieve efficiency and compliance with federal regulations.

Specialization

2 CFR 200 Procurement
Compliance, Subrecipient
Procurement Monitoring,
Contract & Purchase Order
Oversight

Past Performance

- Florida Department of Commerce (FL Commerce)
- Florida Division of Emergency Management

Education

- Master of Business Administration – Florida A&M University
- Bachelor of Science, Accounting – Florida A&M University

Professional & Industry Experience

Disaster Recovery – FEMA Programs

FL DEM Hurricane Michael

Grants Management for Disaster Recovery

Johnwayne has served as a team leader in comprehensive grants management of Hurricane Michael (DR-4399-FL) projects for Bay County for the Florida Division of Emergency Management (FDEM). His tasks included project worksheet approval review and approval, the validation and processing of requests for reimbursements, and compliance reviews of work eligibility and subrecipient procurement.

Procurement Policy Review (2 CFR 200 Compliance)

Johnwayne served as the project lead assisting a state agency client with an evaluation of their emergency procurement framework to ensure policies, procedures, and practices are compliant with applicable state and federal rules and requirements. Johnwayne played a key role in leading the Indelible team and assessing internal procedures and policies and providing recommendations for potential improvements to facilitate a faster, safer, and more effective procurement activities.

Current State Assessment & Change Management

Johnwayne was a team member in a state agency's clients current state assessment and change management review of internal processes. As the engagement manager, Johnwayne assisted in the completion of key stakeholder interviews to assess current controls and processes, review of current policies and procedures for recommended improvements, and an assessment of key client and sister agency engagement.

Policy and Procedure Restructure

Johnwayne served as a valued team member on a project assisting a State Agency client's Finance and Recovery bureau with an assessment and restructure of their policies and procedures surrounding "Grey Sky" emergency procurement. Johnwayne's role include review and assessment of the policies surrounding purchase order oversight, contract management, approval sign-off processes, and FEMA PA disaster recovery reconciliation processes.



KAREN BUSHNELL

Karen Bushnell has over 18 years of experience managing federally funded disaster recovery and capital improvement projects with a focus on compliance, grants administration, and insurance reconciliation. She has supported federal, state, and local governments, nonprofits, and health organizations, ensuring expenditures align with FEMA, HUD, FAA, DOT, USDA, and NRCS requirements. Karen specializes in duplication of benefits analysis, claim reconciliation, and policy development to reduce audit risk. Her background also includes 15 years in large-scale industrial construction management, overseeing projects valued up to \$800 million.

Specialization

Insurance Adjustment, Grants Management, Duplication of Benefits, Federal Compliance, Disaster Recovery, Risk Mitigation, Project Management, Regulatory Compliance

Past Performance

- Florida Division of Emergency Management (FDEM)
- Oregon Department of Transportation
- Village of Ruidoso, NM
- Polk County, FL
- Local Government Client, FL
- Florida Department of Transportation (FDOT)
- New York State Department of Health (NYSDOH)

Education

- Master of Science – Accounting and Financial Management, Fraud and Forensic Accounting
- Master of Business Administration – Human Resource Management and Business Law
- Certified Claims Adjuster – All Lines
- Certified Fraud Examiner (CFE)
- Six Sigma Green Belt, LEAN Certified, Design for Six Sigma Certified
- 65+ FEMA Certifications

Professional & Industry Experience

QA Insurance Specialist – Oregon Department of Transportation (2020 Wildfires)

Karen served as the QA insurance specialist responsible for reviewing insurance policies, payouts, and duplication of benefits for wildfire recovery. She reconciled insurance payments against FEMA claims, ensuring accurate invoicing and compliance with federal requirements.

Grant Specialist – Florida Division of Emergency Management (Hurricanes Michael, Ian, Nicole, Idalia)

Karen supported reconciliation of costs claimed to invoices, approved scopes of work, and contracts. She identified more than \$2.5 million in duplicate and phantom claims, safeguarding federal funds and reducing audit risk.

Grants Manager – Village of Ruidoso, New Mexico

Karen coordinated federally funded capital improvement projects, ensuring adherence to FEMA, DOT, and HUD requirements. She managed grant and special fund administration, prepared SEFA and Single Audit reports, and ensured proper use of public funds by monitoring budgets and spending trends.

Financial Analyst – Polk County Utilities Division, Florida

Karen prepared annual and five-year capital improvement budgets for an \$83 million expansion fund. She conducted budget-to-actual reconciliations and monitored expenditures to ensure compliance with federal funding requirements.

Policy & Compliance Specialist – Local Government Client, Florida

Karen developed federal grants management policies and standard operating procedures, including fixed asset and capital improvement policies. Her work corrected four years of audit deficiencies, bringing the government into compliance within 18 months.

Financial Oversight Specialist – Florida Department of Transportation (Disaster and Capital Projects)

Karen supported FDOT in the financial oversight of federally funded transportation projects. She reviewed budgets, contracts, and expenditures to ensure compliance with FEMA and DOT requirements, strengthening internal controls and reporting accuracy.

Grant Compliance Specialist – New York State Department of Health (Federal Health Programs)

Karen assisted NYSDOH with the administration of federally funded health-related programs. She provided financial reconciliation, compliance oversight, and reporting support, ensuring adherence to federal guidelines and reducing the risk of questioned costs.



KYLE ERICKSON

Kyle Erickson has over 10 years of experience in state government. Kyle served as an auditor for multiple departments in the state of Florida and has also performed data analysis and risk assessments for various government agencies. Kyle is a Certified Inspector General Auditor and was awarded the Tallahassee Chapter of the Association of Government Accountant's (AGA) Author Award in 2017 for his contribution to an auditing article published in the AGA's newsletter.

Specialization

Duplication of Benefits
Reviews & Compliance,
CDBG-DR Housing &
Broadband Program
Oversight, Audit & Risk
Assessment.

Past Performance

- Florida Division of Emergency Management (FDEM)
- Alabama Department of Economic and Community Affairs (ADECA).

Education

- Master of Business Administration – Florida A&M University
- Bachelor of Science, Finance – Florida State University
- Certified Inspector General Auditor
- Certified Contract Manager – State of Florida

Professional & Industry Experience

Disaster Recovery - Housing & Community Development

Case Manager, AL ADECA Community Development Block Grant (CDBG)

Kyle, in coordination with strategic partner Horne, LLP, is currently assisting the Alabama Department of Economic and Community Affairs in administering the Home Recovery Alabama Program (HRAP), which provides financial assistance to residents impacted by Hurricanes Sally and Zeta. He serves on the program's Duplication of Benefits team, where he is responsible for ensuring that applicants do not receive duplicative financial assistance. This involves verifying that the total aid received from other sources does not exceed the eligible, non-duplicative amount provided by HRAP, ensuring compliance with federal and program-specific guidelines.

Program Management

Case Manager Supervisor, FL Commerce - Homeowners Assistance Fund

Kyle assisted the Florida Department of Commerce in the administration and disbursement of over \$600 million through the Homeowner Assistance Fund, a program designed to support homeowners impacted by the COVID-19 pandemic. He supervised a team of six, ensuring timely and accurate application entry, while overseeing team operations to maintain workflow efficiency. Kyle also managed his team's direct communication with program applicants, upholding program guidelines and delivering exceptional customer service. His leadership played a key role in the effective processing of applications and the successful allocation of critical financial relief to eligible Florida homeowners.

Auditing Services

Auditor-In-Charge, Office of Inspector General

Kyle served as Auditor-In-Charge at the Florida Department of Health, where he led a statutorily required audit of procurement practices, uncovering contract fraud and recouping over \$200,000. At the Florida DOT Office of Inspector General, he supervised a contract audit team, conducting internal control reviews, indirect cost audits, and reimbursement claim assessments. He also performed enterprise-wide evaluations of contract processes, improving accountability, transparency, and financial recovery across multiple jurisdictions.



L.T. McCrimmon

Communications and public affairs professional with 20+ years' experience developing strategies, managing outreach campaigns, and translating complex policy into clear messaging to engage stakeholders and advance organizational priorities.

Specialization

Specializations include strategic communications, public affairs, media relations, stakeholder engagement,

Past Performance

- APCO Worldwide
- Vice-President Kamala Harris/Tim Walz Campaign
- Office of Governor Roy Cooper

Education

- Executive Master of Public Administration- North Carolina Central University.
- Bachelor of Arts in Political Science- Shaw University, Raleigh.
- Bachelor of Arts in Criminal Justice- Shaw University, Raleigh.

Professional & Industry Experience

Senior Director and Lobbyist, APCO WORLDWIDE – Raleigh, NC

Head of the Government Affairs practice for APCO South, working with clients on state and federal government relations, advocacy and public affairs efforts.

NC-Senior Advisor, President Kamala Harris/Tim Walz – Raleigh

Provide advisory support and counsel to campaign manager, manage political relationships and assist with coalition efforts.

Legislative Director, Office of Governor Roy Cooper – Raleigh, NC

Led Governor Cooper and cabinet agencies' legislative strategy through years of divided government, emphasizing new investments in jobs, energy legislation and Criminal Justice Reform. Negotiated and executed the passage of the first signed state two-year bipartisan budget into law on November 18, 2021. The budget designates \$26 billion in spending in 2021-22 and \$27 billion for 2022-23. Served as the Governor's lead negotiator regarding ongoing Medicaid expansion conversations with the Republican-led General Assembly. Advised the Governor in daily briefings and strategy sessions as a senior leadership team member.

Deputy Legislative Director, Office of Governor Roy Cooper – Raleigh, NC

Led the development of Governor Roy Cooper's legislative agenda, coordinated lobbying activities of the administration and negotiated core issues with the General Assembly. Responsible for advising the Governor and members of his cabinet on probable legislative reactions to administration proposals.



LAWRENCE MCCALLA

Lawrence is an experienced disaster recovery and grants management professional who supports CDBG-DR programs. Skilled in applicant intake, duplication of benefits reviews, compliance oversight, and escalation resolution, with proven success supervising teams and safeguarding program integrity. Adept at managing high-volume caseloads, verifying eligibility, and delivering exceptional applicant support to ensure timely, compliant recovery outcomes.

Specialization

CDBG-DR Case Management & Intake Support, Applicant Escalations & Award Processing, Team Supervision, Compliance Oversight & Quality Control, Federal & State Grants Experience

Professional & Industry Experience

Grants Management – T&I

Consultant, FL COM BEAD Subgrantee Selection

Lawrence played a key role in executing the Florida Commerce BEAD Program, a statewide initiative to expand broadband access for over 250,000 unserved and underserved homes and businesses. He supported the program during a surge of applications under tight federal and state deadlines, managing intake, upload, and review while verifying accuracy and eligibility. By identifying and escalating discrepancies, Lawrence reduced bottlenecks, ensured compliance, and upheld quality standards, contributing to the program's efficiency and integrity.

Disaster Recovery – Housing & Community Development

Case Manager, FL Commerce – CDBG-DR

Lawrence worked on the Florida Commerce's CDBG-DR Rebuild Florida HRRP initiative where he served as a key point of contact for over 50 high-profile applicants. Lawrence was responsible for reviewing and processing hundreds of invoices and supporting documents to ensure the timely repair or replacement of homes damaged by Hurricane Ian. His meticulous review process included examining FEMA documentation, private loans, insurance claims, and SBA duplication of benefits to ensure accuracy and compliance with program requirements. Additionally, Lawrence conducted award letter signings, managed applicant escalations, and provided comprehensive support throughout the application process. His deep program knowledge, attention to detail, and responsiveness made him a critical asset to both applicants and program success.

Program Management

Validation Supervisor, Texas Workforce Commission

Lawrence's dedication and subject matter expertise at the Texas Workforce Commission earned him a promotion to Supervisor at the direct request of the client. In this leadership role, he was responsible for reviewing transactions exceeding \$25 million to ensure strict compliance with state regulations, program guidelines, and funding requirements. Lawrence also played a key role in developing applicant testing documents to assess the allowability of funds, particularly for high-impact initiatives such as the Texas Workforce Commission Childcare Relief Fund. His attention to detail and deep understanding of compliance protocols were instrumental in safeguarding program integrity and supporting effective fund distribution.



MARIO RUBIO

Mario Rubio has over 43 years of executive leadership experience in both the public and private sectors. He began his career in the United States Army, and he later served as a Green Beret in the 7th Special Forces Group at Fort Bragg, North Carolina. Throughout his extensive career he has held key leadership positions, where he oversaw various operational departments. His past affiliations include roles as chairman of the Florida Department of Elder Affairs Advisory Council and chairman of the Mayor's Hispanic Advisory Board (Duval County).

Specialization

Executive Leadership,
Operational Development,
Community Development,
Policy Development, Disaster

Past Performance

- Florida Department of Economics
- Florida Department of Children and Families
- City of Jacksonville-Florida

Education

- Bachelor of Business Administration, Accounting and Finance – Florida International University

Professional & Industry Experience

Disaster Recovery

Deputy Secretary, Florida Commerce

Mario served as Deputy Secretary for the Florida Department of Economic Opportunity, where he led a diverse division and administered approximately \$2.5 billion in federal and state grants and small business loans. He was responsible for overseeing a wide range of programs, including LIHEAP (Low-Income Home Energy Assistance Program), WAP (Weatherization Assistance Program), CSBG (Community Services Block Grant), CDBG (Community Development Block Grant), CDBG-CV (CARES Act funding), CDBG-DR (Disaster Recovery), RIF (Rural Infrastructure Fund), and the State Planning Agency, the Office of Small and Minority Business Capital, the Community Partnership Department, and the Office of Broadband, driving initiatives that supported community development, economic resilience, and equitable access to services throughout Florida. His strategic guidance helped advance the department's mission to strengthen communities and expand opportunity statewide.

Auditing & Compliance

Executive Leadership, Department of Children and Families

Mario led the Licensing Department for the Department of Children and Families, where he was responsible for overseeing regulatory compliance and quality assurance across childcare facilities, foster homes, substance abuse programs, and mental health services. His leadership ensured the safety and well-being of vulnerable populations while maintaining adherence to state guidelines and best practices. In addition, Mario directed the Workforce Leadership Development Department, where he focused on designing and implementing leadership development programs across the enterprise. His work played a critical role in cultivating talent, enhancing organizational capacity, and fostering a culture of continuous improvement and professional growth.

Strategy

Administrator, City of Jacksonville

Mario served as Administrator for the City of Jacksonville, where he championed equitable access to city contracting opportunities for small businesses. He played a key role in ensuring that local enterprises had a fair chance to compete for and secure municipal contracts, fostering inclusive economic growth. Mario worked collaboratively with the City Council, the Mayor's Office, and various state agencies to advocate for and implement legislative changes that supported the city's broader economic development goals.



MIKHAIL SCOTT

Mikhail Scott has over 11 years of experience in public affairs in both state and federal government agencies. Over the years he has served in numerous roles where he participated in the development of legislative policy and government programs. Mikhail is passionate about community outreach initiatives that help to improve local food systems, educate underserved populations on access to healthcare, provide emergency relief assistance, and the facilitate economic resources in response to disasters.

Specialization

Project Management, Community Outreach, Public Relations and Media Coordination, Governmental Affairs, Policy Analysis and Development, Public Health Research & Analysis, Food Systems & Food Security, Corporate Philanthropy, Strategic Partnership Development

Past Performance

- Florida Department of Commerce (FL Commerce)
- Florida Division of Emergency Management (FDEM)
- Florida Department of Children and Families (DCF)
- Feeding America
- AMIKids
- United Way
- Habitat for Humanity

Education

- Bachelor of Science, Public Relations – Florida A&M University

Professional & Industry Experience

Manager, Florida Department of Commerce / Florida Division of Emergency Management / Florida Department of Children and Families

Mikhail is an experienced project manager specializing in public health and community outreach initiatives. His leadership spans critical programs such as Hurricane Ian Disaster Recovery, COVID-19 Awareness and Education Campaigns, Emergency Rental Assistance, the Florida Homeowner Assistance Fund, the Low-Income Household Water Assistance Program, and food access efforts.

Mikhail has led outreach operations and managed government program sites, including serving as a Disaster Recovery Center Manager for the Florida Department of Commerce in the aftermath of Hurricane Ian. In that capacity, he oversaw a team of more than 50 personnel and acted as a liaison between state and federal agencies to connect hurricane survivors with vital recovery resources. He also served as a site manager for the Department of Children and Families' (DCF) Disaster Supplemental Nutrition Assistance Program (D-SNAP), coordinating operations across multiple Florida counties. His responsibilities included staff training, community intake and registration, and collaboration with DCF leadership.

With a deep knowledge of outreach strategies, Mikhail has directed project teams of over 500 staff and facilitated engagement with more than one million residents throughout Florida and beyond. His expertise lies in large-scale program coordination, disaster response, and effective stakeholder engagement.

Strategic Partnership Development, Indelible Impacts Foundation

Mikhail leads the Indelible Impacts Foundation, where he oversees community philanthropy, social change, and corporate responsibility initiatives. Under his leadership, the foundation has developed and maintained hundreds of partnerships and hosted outreach events promoting public health, education, disaster relief, and economic empowerment. He has managed over \$2 million in corporate giving, including directing the 2022 Indelible Gives campaign, which delivered over \$500,000 in food, clothing, toys, and services to families in Hurricane Ian-affected Lee County.

Mikhail brings a strong background in public relations and marketing, with experience designing and executing traditional, digital, and social media campaigns. He has worked with national media and nonprofit partners including WEDU PBS, iHeart Media, Feeding America, AMIKids, United Way, and Habitat for Humanity. His oversight of outreach, marketing, and communications budgets has exceeded \$25 million, reflecting his ability to drive impact at both the grassroots and strategic levels.



REBECCA WILSON

Rebecca Wilson has more than 10 years of professional experience supporting federally funded programs, with a focus on FEMA Public Assistance and disaster recovery grant management. She specializes in documentation compliance, internal quality assurance, and audit readiness. Rebecca has led efforts to evaluate subrecipient performance, ensure regulatory compliance, and guide applicants through complex appeals, amendments, and reimbursement processes. Known for her clear communication strategies and risk mitigation planning, she develops scalable systems aligned with federal standards. Her leadership consistently advances client objectives while strengthening compliance and overall program integrity.

Specialization

Advisory, Audit, Grants Management, Regulatory Compliance, Quality Assurance, Risk Mitigation, FEMA Public Assistance, Documentation Review,

Past Performance

- Florida Division of Emergency Management
- Florida Commerce

Education

- Bachelor of Science, Communication – Liberty University

Professional & Industry Experience

Grants Management and Compliance Oversight – Disaster Recovery

Rebecca has served as the Contract Lead Support for the Florida Division of Emergency Management engagement for the past four years, playing a pivotal role in ensuring the success and efficiency of the project team. In this role, she works closely with team leads to streamline workflows, optimize output, and consistently drive performance to meet or exceed the \$1M/week KPI for RFRs. Rebecca collaborates effectively with both external clients and internal partners, ensuring high productivity levels and strong client satisfaction. She works directly with the FEMA PDMG and guides Applicants through complex processes, including appeals, amendments, and time extension requests. Beyond her contributions in Florida, Rebecca has exceeded client expectations on multiple engagements across various states, ranging from internal audits and state regulatory reviews to client validation initiatives. Her consistent track record of exceeding expectations reflects her dedication, professionalism, and deep expertise in emergency management and regulatory compliance.

FEMA Public Assistance – Hurricane Michael & Irma (DR-4399, DR-4337)

Rebecca serves as the Contract Lead for comprehensive grants management of Hurricane Michael (DR-4399) and Hurricane Irma (DR-4337) for Florida's Division of Emergency Management (FDEM). Her responsibilities include leading applicant calls, overseeing project worksheet approvals, evaluating subrecipient performance, processing Requests for Reimbursement (RFRs), conducting compliance reviews, and managing formal project closeouts. She also supports municipalities across the state in navigating complex regulations and federal requirements, ensuring effective and compliant grant administration. Rebecca's deep understanding of FEMA Public Assistance policies and her proactive approach make her a valuable resource in resolving challenges and streamlining recovery efforts.

Process Improvement and Risk Mitigation

Rebecca spearheaded strategy development and implementation for proposals and client projects while supporting management in the creation and maintenance of key business collateral. Her proactive approach led to more efficient business processes, improving firmwide reporting and operational workflows. She collaborated closely with teams to ensure timely delivery of client work and fostered strong communication with staff and engineers to identify and resolve issues. Additionally, Rebecca partnered with business stakeholders to assess processes, uncover deficiencies, and implement new controls aimed at mitigating risks and enhancing overall performance.



STEVE KILLOUGH

Steve Killough is a consultant at Indelible with over 30 years of professional experience in business management, compliance, and operations oversight. His background in accounting, customer service, and team leadership equips him to manage housing programs with efficiency and accountability. Steve's experience coordinating resources, supervising staff, and ensuring compliance enables him to oversee applicant intake, eligibility, and placement processes while maintaining strong program integrity.

Specialization

Accounting & Bookkeeping,
Corporate and Payroll Tax
Compliance, Business
Consulting, Internal Audits of
General Ledgers, Financial
Statements, Payroll and
Business Records

Past Performance

- Florida Department of
Commerce (FL COM)

Education

- Bachelor of Science –
Florida State College at
Jacksonville

Professional & Industry Experience

Auditing & Compliance

Auditor, FL COM Irma Case Management

Steve led financial reconciliations for a state-led housing program, where he was responsible for the auditing, reconciliation, and presentation of all documents and records required for cost reimbursement related to temporary housing. He ensured that all financial data met strict regulatory and documentation standards, supporting accurate and timely reimbursement by state agencies. This work required meticulous record keeping, verification of charges against supporting documentation, and the preparation of final deliverables for state submission. Steve's attention to detail and understanding of compliance requirements ensured 100% accuracy of all charges and payments submitted for reimbursement.

Past Work Experience

Audit & Validation

Steve has been responsible for the auditing, reconciliation and presentation of all documents and records required by the client and state agencies for the reimbursement of cost related to temporary housing. This process required meticulous record keeping, meeting the rigorous requirements of the client to ensure 100% accuracy of all charges and payments and create the deliverable product for submission to the state agencies for reimbursements.

Steve has over 30 years of accounting experience and provides in depth knowledge of general accounting principles, auditing standards and regulatory compliance. This extensive background has allowed Steve to excel in this role and receive recognition from the client, state agencies and project leadership decisions throughout the temporary housing project.



TREVOR BOSCACCI

Trevor is a Certified Public Accountant with more than 10 years of experience in strategic management consulting, project management, and process improvement. He has led large-scale transformation initiatives to increase organizational efficiency and streamline processes. Trevor has a proven track record of developing meaningful solutions to his client's business objectives and goals.

Specialization

Financial Compliance & Oversight, Audit Readiness & Internal Audit (SOX, governance audits), Internal Controls & Risk Management, Accounting & Financial Reporting (A&FR), Process Improvement & Efficiency, Governance & Regulatory Compliance

Past Performance

- Florida Division of Emergency Management (FDEM)
- FEMA

Education

- Master Accountancy – University of South Florida
- Bachelor of Science, Accounting and Finance – University of South Florida
- Licensed Certified Public Accountant (CPA) – State of Florida

Professional & Industry Experience

Strategy

A&FR Lead, NJ EDA Operational Transformation

Trevor assisted a government agency with expediting their normal financial close-out process while spearheading transformation initiatives within their accounting and financial reporting (A&FR) function. Specifically, Trevor helped the A&FR department return to a timely financial close-out process after sustaining a 6-month backlog on their accounting records. He led initiatives throughout the Client's organization to help streamline, modernize, and enhance their A&FR functions. Managed a cross-cutting initiative to pilot and implement an e-billing process, which reduced hand-processed paper bills. Redesigned and formalized budgeting and planning processes, in addition to financial management reporting capabilities. Championed a continues process improvement initiative in collaboration with A&FR leadership, identifying and enhancing over a dozen key processes. Facilitated a workload rebalancing initiative to streamline tasks, optimize utilization of A&FR personnel, and reduce bottlenecks. Engaged and led discussions with multiple external technology vendors to enhance the Client's information systems and drive a more effective utilization of existing processes.

Auditing Services

Internal Auditor and Governance Deficiency Manager, Financial Service Industry

Trevor served as an Internal Auditor for a Fortune 500 financial services corporation. In this role, Trevor was responsible for developing and managing targeted reviews of internal business units to independently assess control adequacy, identify areas of concerns, and communicate findings and results to senior management for remediation. In addition to conducting control and process reviews, Trevor focused on process improvement and enhancement to reduce risk and drive operational efficiency. His work spanned across various critical business areas, including but not limited to human resources, financial reporting, treasury, payroll, fixed-income trading, equity trading, compliance, information technology, and retail supervision. While performing audits, Trevor developed comprehensive risk-and-control matrixes, assigned risk rankings, assessed potential financial and reputational impact in the event of control failure, and delivered recommendations to strengthen control performance and process efficiency. Additionally, Trevor performed financial audits in accordance with the Sarbanes-Oxley Act to confirm the accuracy of the firm's financial statements and effectiveness of financial controls.

In addition, Trevor served in the Retail Supervision Governance function, where he managed, tracked, and reported on large-scale, multi-year projects with a focus on enhancing the control framework, improving processes, and implementing best practices within the firm's largest business segment. Working cross-functionally, he oversaw and supported the implementation of new technology, policies, practices, and supervisory procedures aimed at reducing firm risk.



Xavier Wooten

Xavier has over four years of experience in case management, disaster recovery, and grants management. He brings a unique background in both technology and marketing, enabling him to drive projects forward with a focus on operational efficiency and financial impact. Xavier is known for delivering high-quality case management services and maintaining a strong commitment to client and customer satisfaction.

Specialization

Housing Placement & Relocation Support, Disaster Recovery Case Management, Applicant Communication & Conflict Resolution

Past Performance

- Florida Department of Commerce (FLCOM)
- Florida Department of Emergency Management (FLDEM).

Education

- Bachelor of Science, Computer Science – Edward Waters College

Professional & Industry Experience

Disaster Recovery

Consultant, FL COM IRMA Case Management

Xavier provided case management services, playing a crucial role in assessing the needs of displaced families and identifying suitable housing options as part of hurricane disaster relief efforts. He worked closely with other case managers, applicants, and housing representatives (e.g., hotels) to streamline the housing placement process, ensuring clear and consistent communication to enhance the experience for all parties involved. He was known for going above and beyond to find housing opportunities that met each client's criteria while taking their specific requests into account.

Xavier was responsible for maintaining detailed documentation, managing client information, and resolving conflicts that arose during the housing placement process. The role required strong communication, conflict resolution, and organizational skills to effectively coordinate resources and support families in their recovery, while ensuring compliance with disaster relief guidelines and upholding the highest standard of service. His approach to case management was driven by compassion, integrity, and a commitment to making a meaningful impact.

Disaster Recovery – FEMA Programs

Consultant, FL DEM Hurricane Irma

Xavier was responsible for auditing a wide range of documentation to ensure the accuracy and accessibility of validation data. His work in data analysis and validation required a solid understanding of general accounting principles, auditing standards, and regulatory compliance, enabling him to support the planning and execution of recommendations that promoted fiscal responsibility for the client.

During his tenure at the Florida Division of Emergency Management, Xavier excelled in meticulously validating reimbursement requests and conducting thorough process reviews for disbursement. Utilizing advanced technological platforms, he collaborated effectively with his team to maximize operational efficiency and successfully disbursed millions of dollars to eligible applicants.

Xavier's talent for innovative problem-solving led to the streamlining of processes across multiple teams, highlighting the value of his contributions. His pivotal role in ensuring the accuracy, completeness, and consistency of organizational data sets empowered both team members and clients to make well-informed decisions based on reliable data.

Appendix B: Form & Attachments

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:		
Indelible Management Solution Inc.		
STREET ADDRESS:		P.O. BOX: 27703
4819 Emperor Boulevard, Suite 400		
CITY & STATE & ZIP:		TELEPHONE NUMBER: TOLL FREE TEL. NO:
Durham, North Carolina		(904) 647-4667
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
3800 Esplanade Way, Suite 210 Tallahassee, FL 32311		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:		FAX NUMBER:
Michael White, Chief Business Development Officer		
VENDOR'S AUTHORIZED SIGNATURE:	DATE:	EMAIL:
	9/4/2025	mwhite@indelible-solutions.com

VALIDITY PERIOD

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

ACCEPTANCE OF PROPOSAL

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

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



NC DEPARTMENT

of COMMERCE

COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

BID ADDENDUM

August 26, 2025

FAILURE TO RETURN THIS ADDENDUM MAY SUBJECT YOUR BID TO REJECTION

Solicitation Number	Doc1677946894
Solicitation Description	Staff Augmentation
Addendum Number	1

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

CHANGE TO SOLICITATION:

1. **Section 4.3 PAYMENT STRUCTURE** has been amended to read:

Payment will be a **fixed fee** not-to-exceed for services based on the scope of work for each task order.

2. **Attachment C: North Carolina General Contract Terms and Conditions 2(b)** is stricken as written in the original solicitation and is hereby replaced with the following language:

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

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

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

RESPONSE TO QUESTIONS:

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

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

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

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

	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, " <i>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</i> ".
21	Offer Checklist Page no: 60	Should the attachments be included within the Technical Proposal?	The entire offer, one (1) pdf file, should be uploaded in eProcurement Sourcing in Section 5.1 VENDOR OFFER.
22	Offer Checklist Page no: 60	Should the attachments be submitted as separate files?	The attachments should not be submitted as separate files.
23	4.5 Hub Participation Page no: 16	Is it mandatory for the vendor to meet the 10% HUB participation goal	No. See response to Question #3.
24	No reference citation provided by the Vendor.	Will the vendor's resources be required to work on-site?	Some personnel may be required to work on-site, depending on the task order.
25	No reference citation provided by the Vendor.	Will the vendor's resources be required to work on-site, remotely, or a combination of both?	Depending on the task order, some personnel may be required to work on-site; others will be able to work remotely.
26	5.2.16 Technical Systems Specification & Project Management Page No: 23	Will the vendor be required to provide actual IT development/configuration, or only project management and system specification support?	Only project management system specification support. DCR has issued a separate procurement for a grants management system.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

		responding, will be submitted, correct?	
146	4.8 Vendor's Representations Page 16	Please confirm whether the selected vendor will be classified as a contractor rather than a subrecipient?	The selected vendor will be classified as a contractor.
147	5.1 General (Scope of Work) Page 18	Please confirm whether these tasks pertain to full-team capabilities rather than being specific to any one vendor?	If this question is referring to partners and subcontractors, then the tasks pertain to full-team capabilities (including partners and subcontractors).
148	5.1 General (Scope of Work) Page 18	For tasks similar to previous DCR CDBG-DR RFPs, does DCR expect to engage vendors for expanded scopes of work not previously contemplated, or only in the event of identified limitations with selected vendor for those RFPs?	DCR recognizes that either of these is possible – unanticipated work as well as limitations with another selected vendor. DCR will distribute tasks among vendors depending on its need and the vendors' qualifications and experience.
149	5.2 Tasks/Deliverables Page 19	Would selected vendor(s) for the below tasks assist work in conjunction or in the alternative potentially to vendor(s) selected to perform the Scope of Work envisioned in RFP# DPC-646236801-MT? <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.

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

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

		<p>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?</p>	
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>	<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.</p>
164	4.11 FINANCIAL INFORMATION Page 17	<p>Can submit financial statements directly instead of including in the response, to avoid any unintentional disclosure given the highly confidential nature of the information?</p>	<p>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.</p>
165	5.1 General Page 18	<p>Does the State have an estimate of how many staff will be activated for this contract?</p>	<p>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>"</p>

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

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

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

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

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

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

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

Execute Addendum:

VENDOR: Indelible Management Solutions Inc.

AUTHORIZED SIGNATURE: 

NAME and TITLE (Print or Typed): Michael White, Chief Business Development Officer

DATE: 9/4/2025

ATTACHMENT A: TASK ORDER CATEGORIES / PRICING

TASK ORDER CATEGORIES:

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

- YES NO TASK 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>Policy & Compliance Analyst</i>	\$125.00	\$130.00	\$136.00
<i>Technical Writer</i>	\$165.00	\$172.00	\$179.00
TASK 2 – Financial Compliance, Oversight, and Fraud Prevention			
<i>Internal Auditor</i>	\$150.00	\$156.00	\$163.00
<i>Financial Compliance Specialist</i>	\$130.00	\$135.20	\$141.00
TASK 3 – Duplication of Benefits (DOB) Compliance			
<i>DOB Compliance Officer</i>	\$150.00	\$156.00	\$163.00
<i>Financial Compliance Specialist</i>	\$130.00	\$135.20	\$141.00
TASK 4 – Procurement Compliance and Monitoring			
<i>Procurement Specialist</i>	\$143.00	\$149.00	\$155.00
<i>Policy & Compliance Analyst</i>	\$172.00	\$179.00	\$186.00
TASK 5 – Claims, Appeals, and Case Reviews			
<i>Case Manager Lead</i>	\$135.00	\$141.00	\$146.00
<i>Appeals Review Specialist</i>	\$130.00	\$136.00	\$141.00
TASK 6 – Action Plan Development and Amendments			
<i>CDBG-DR SME Specialist</i>	\$250.00	\$260.00	\$270.00
<i>Program Planner</i>	\$195.00	\$203.00	\$211.00
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support			
TASK 8 – Program Performance Monitoring and Evaluation			
<i>Performance Evaluation Analyst</i>	\$130.00	\$136.00	\$141.00
<i>Data & Reporting Specialist</i>	\$125.00	\$130.00	\$136.00
TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation			
TASK 10 – Audit Readiness and Monitoring Support			
<i>Internal Auditor</i>	\$150.00	\$156.00	\$163.00
<i>Data & Documentation Specialist</i>	\$125.00	\$130.00	\$136.00
TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects			

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 12 – Training, Technical Assistance, and Capacity Building			
Training Program Coordinator	\$175.00	\$182.00	\$189.28
Technical Writer	\$165.00	\$172.00	\$179.00
TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support			
Relocation Programs Manager	\$205.00	\$214.00	\$222.00
Relocation Compliance Lead	\$165.00	\$172.00	\$179.00
TASK 14 – Communication, Public Information, and Outreach Support			
Public Information Officer	\$225.00	\$234.00	\$244.00
Communications Specialist - Technical Writer	\$165.00	\$172.00	\$179.00
TASK 15 – Grant Management			
Grant Manager	\$145.00	\$151.00	\$157.00
CDBG-DR SME Specialist	\$205.00	\$214.00	\$222.00
TASK 16 – Technical Systems Specification & Project Management			
Project Manager	\$205.00	\$214.00	\$222.00
Data and Reporting Specialist	\$125.00	\$130.00	\$136.00
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 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 YES NO **performing services under the Contract outside of the United States**

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:

North Carolina
South Carolina
Georgia
Florida
Texas
Virginia

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, Indelible Management Solutions 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

Michael White, Chief Business Development Officer

Name and Title of Vendor's Authorized Official

9/4/2025

Date

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:	Lee County
Program:	Lee County CDBG-DR Individual Housing Program
Brief Description of Services Rendered:	<p>Indelible led the outreach strategies to disseminate program information through door-to-door canvassing, community events, and strategic partnerships. The outreach efforts were tailored to ensure the greatest involvement of the elderly, disabled, and socially disadvantaged and to guarantee vulnerable populations were adequately informed of program information. Indelible's outreach team members made sure that eligible residents would have meaningful and equal access to the program, including appropriate ADA accommodations and translation of vital documents. Indelible's current outreach efforts have led to over 17,000 door knocks in targeted communities located throughout Lee County.</p> <p>Indelible also assisted the county with case management services, which included the following:</p> <ul style="list-style-type: none"> ❖ Application Intake ❖ Intake Review ❖ Eligibility Review ❖ Duplication of Benefit (DOB) Reviews ❖ Scheduling and Completion of Applicant Grant Agreement Signing ❖ Closeout Review

Example 2	
Client Name:	Alabama Department of Economic and Community Affairs (ADECA)
Program:	AL ADECA Community Development Block Grant Disaster Recovery

Brief Description of Services Rendered:	<p>Indelible, in partnership with Horne, was contracted to assist with the administration of Community Development Block Grant–Disaster Recovery (CDBG-DR) and Community Development Block Grant–Mitigation (CDBG-MIT) funding to develop, monitor, and administer the U.S. Department of Housing and Urban Development (HUD) programs for recovery and mitigation efforts following Hurricane Sally. Through the Home Recovery Alabama Program (HRAP), the state provided housing assistance to eligible single-family homeowners and rental property owners impacted by the storms. Indelible played a key role in supporting applicant intake and conducting comprehensive eligibility and duplication of benefits (DOB) reviews, ensuring compliance with federal, state, and programmatic requirements regulations.</p> <ul style="list-style-type: none"> ❖ Provided five (5) customer-service oriented team members who will perform Case Management functions for HRAP. Case Managers are responsible for: <ul style="list-style-type: none"> ○ Application Intake ○ Intake Review ○ Eligibility Review ○ Collection of Duplication of Benefits Gap Funding ○ Scheduling and Completion of Applicant Grant Agreement Signing ○ Closeout Review ○ Accepting and reviewing applicant appeals ○ Responding to applicant inquiries or complaints as needed ❖ Provided three (3) customer-service and detail-oriented team members to perform duplication of benefits analysis (DOB Analysts). DOB Analysts are responsible for: <ul style="list-style-type: none"> ○ Collecting information from applicants, insurance providers, and other third-party sources to account for all previous benefits received by program applicants. ○ Accounting for and excluding any excludable benefits as allowed by HRAP program policy and federal regulations governing duplication of benefits.
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Example 4

Client Name:	Florida Department of Commerce
Program:	CDBG-DR Project Management and Housing Repair and Replacement Program (HRRP)

Brief Description of Services Rendered:	<p>Indelible, KPMG LLP, and the prime vendor Horne LLP were contracted to assist the Florida Department of Commerce after Hurricane Ian, a Category 5 storm, caused unprecedented damage to homes, businesses, and infrastructure across Florida. Following the devastating impact of Hurricane Ian and the subsequent Hurricane Nicole, the state of Florida received an allocation of \$910,624,000 in CDBG-DR funds from HUD in March 2023. These funds aim to address the lingering unmet needs in areas impacted by Hurricane Ian. Florida Commerce has prioritized serving the most vulnerable communities, particularly in the hardest-hit counties of Southwest, Central and Northeast Florida to spur housing, rebuild infrastructure and drive economic recovery, which provide housing assistance to eligible renters, single-family owner/occupant applicants and owners of single-family rental properties affected by Hurricane Ian.</p> <p>Horne, Indelible, and KPMG are managing the program implementation of the entire allocation of funding including the subrecipient and HRRP programs. KPMG is overseeing, with assistance from Indelible, the subrecipient program which is designed to provide funding for local governments to carry out strategic and high-impact disaster recovery activities to rebuild and harden infrastructure to prevent and/or reduce losses in future disasters and strengthen economic revitalization.</p> <p>Indelible is leading the outreach efforts to drive program interest and application submission for the Hurricane Ian Housing Repair and Replacement Program. Currently, Indelible has managed over 100 unique outreach events within the impacted communities. Indelible supported the development of an outreach, marketing, and communications plan to help inform outreach efforts and materials for the program. Additionally, Indelible has worked to build relationships with local communities, stakeholders, long-term recovery groups, VOADs, and religious organizations, and ensure program information is clearly shared with these community groups.</p> <p>Our team is also currently assisting with case management activities by providing intake, eligibility, duplication of benefits reviews, applicant contact, award coordination, closeout review, customer service, and other case management responsibilities in the customer service centers across the State of Florida. This includes the review of submitted applications for completion and ensures the program has received all documentation needed to perform a complete eligibility, priority, and DOB review.</p>
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