

Contract Award

Contract Number:	Doc1677946894
Contract Description:	Staff Augmentation
Vendor:	St Bernard Project

Task Order Categories Awarded:

TASK 8 – Program Performance Monitoring and Evaluation

TASK 10 – Audit Readiness and Monitoring Support

TASK 12 – Training, Technical Assistance, and Capacity Building

Proposal Number: *Doc1677946894*Vendor: The St Bernard Project dba SBP

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: The St Bernard Project dba SBP		
STREET ADDRESS: 2645 Toulouse Street	P.O. BOX:	ZIP: 70119
CITY & STATE & ZIP: New Orleans, LA	TELEPHONE NUMBER: 504-289-5303	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: JR Sanderson, Senior Government Advisor		FAX NUMBER:
VENDOR'S AUTHORIZED SIGNATURE: 	DATE: 9/2/2025	EMAIL: jr@sbpusa.org

Proposal Number: *Doc1677946894*


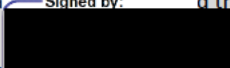
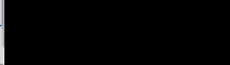
Vendor: The Saint Bernard Project, Inc. dba SBP

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 a  Signed by:  d this 19th day of December, 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 McGarran
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):

SBP (dBa Saint Bernard Project

Authorized Signature:

Name and Title:

Jeffrey R. Sanderson

Date:

Senior Government Advisor

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 8 – PROGRAM PERFORMANCE			
MONITORING AND EVALUATION			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31
TASK 10 – AUDIT READINESS AND			
MONITORING SUPPORT			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31
TASK 12 – TRAINING, TECHNICAL			
ASSISTANCE, AND CAPACITY BUILDING			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31



SBP Advisory Services

The St. Bernard Project, Inc. dba SBP

JR Sanderson, Senior Government Advisor
2645 Toulouse Street, New Orleans, LA 70119
Office/Cel: 504-289-5303 | Email Address: jr@sbpusa.org

RFP # Doc1677946894

SBP validates that it has no actual or potential conflicts of interest involving its company operations or key personnel associated with this solicitation.

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Narrative Response: Vendor Qualifications and Approach

This section demonstrates the SBP's qualifications and capacity to support DCR through future task orders.

• ***A brief history of the organization***

SBP is a nationally recognized disaster resilience and recovery nonprofit organization whose mission is to shrink the time between disaster and recovery. Although unable to prevent natural disasters, SBP believes it can mitigate some of the suffering that accompanies them. In multiple communities across the country and the Caribbean, SBP shrinks the time between disaster and recovery through five interventions: rebuilding efficiently; sharing its model with other organizations; preparing home and business owners through resilience training; advising and training municipal and state officials; and advocating for policy changes and improvements to the disaster recovery industry. SBP is a community service organization motivated by impact. Our mission, our history, and the composition of our leadership team make SBP a unique partner, unrivaled by typical for-profit consulting and advisory firms.

SBP has 19 years of experience working in disaster-impacted communities, performing extensive home rebuilds and repairs for low- to moderate-income families. SBP was founded in March 2006 in response to Hurricane Katrina, specifically to aid in the response and recovery of Saint Bernard Parish, which was devastated by the hurricane, and provided the company with its original name, the Saint Bernard Project. It has since grown from a three-person volunteer team focused solely on rebuilding into a nationally recognized leader in comprehensive disaster resilience and recovery. With more than 130 employees and 240 AmeriCorps members across the country, and with the help of over 180,000 volunteers, SBP has rebuilt more than 6,700 homes nationwide while training hundreds of other nonprofits in disaster case management and rebuilding methods. SBP has conducted rebuild operations in New Orleans, LA (SBP headquarters); Lakeland, FL; Baton Rouge, LA; Houston, TX; Brazoria County, TX; San Juan, PR; Panama City, FL; Columbia, SC; Rockaway, NY; Monmouth & Ocean County, NJ; and Freeport, Grand Bahama. SBP has always prioritized rebuilding for low-to-moderate income communities, including veterans, families with small children, the elderly, persons with disabilities, and under- and uninsured persons.



The Advise team was formed in 2019 to shrink the time between disaster and recovery by advising government and non-profit officials, educating and training public administrators, and providing highly relevant expertise across the disaster spectrum.

Our Government Advisory Services team trains, advises, and consults with government officials from across the country on the design and execution of effective and efficient CDBG-DR programs. We offer multiple training opportunities for public servants on the effective use of CDBG-DR funding, in partnership with our corporate sponsor, the Walmart Foundation. We assist communities in designing and developing their grant delivery programs, encompassing needs assessments, action plans, policies, procedures, and all components necessary for running an effective and efficient grant-funded disaster recovery program. We also provide world-class training on supplemental areas such as disaster housing construction management,

incident recovery, and disaster case management. We conduct consultations, generally as a subrecipient, and provide strategic design and implementation support to grantees, providing methods to overcome barriers to implementation. We also conduct programmatic assessments of programs, which include an on-site review of policies and procedures, and provide leaders with feedback to increase efficiency and throughput.

SBP seeks to compete in this procurement for Task 8, Program Performance Monitoring and Evaluation, including DRGR assistance to the grantee; Task 10, Audit Readiness and Monitoring Support; and Task 12, Training, Technical Assistance, and Capacity Building. SBP's approach to fulfilling these task orders are described below.

• *Relevant experience with HUD-funded programs (e.g., CDBG-DR, CDBG-MIT, HOME, ESG) or other disaster recovery work:*

<u><i>Client (State, City etc.)</i></u>	<u><i>Program Name/Disaster</i></u>	<u><i>Program Size/Funding</i></u>	<u><i>Role Performed</i></u>
Hillsborough County, FL	2024 Hurricanes Helene and Milton	\$709.3 million	Training and Consultation on CDBG-DR eligible programs, Action Plan Development, and Unmet Needs Assessment
North Carolina Office of Recovery and Resilience	2018 Hurricane Florence	\$542.6 million	Training and Consultation on program implementation, CDBG-DR, Construction Management, 2 CFR 200, and DCM Training, Bi-Monthly Technical Assistance consultations, Complete Programmatic Assessment, and Program-wide After Action Review
Puerto Rico Department of Housing	2017 Hurricanes Irma and Maria	\$1.5 billion	Training and Consultation on CDBG-DR eligible programs, 2 CFR 200 Finance and Compliance, Disaster Housing consultations, and overall Technical Assistance
Volusia County, FL	2022 Hurricane IAN	\$328.9 million	Training and Consultation on CDBG-DR eligible programs, Action Plan Development and Implementation guidance and consultations, Action Plan Amendment, Policy and Procedure Development
West Virginia Community Advancement and Development	2016 Flooding	\$256,369 million	Training and Consultation on program implementation, Complete Programmatic Assessment, and overall Technical Assistance
City of Columbia, South Carolina	2015 Floods	\$1,998,900 million	Training and Consultation on program implementation, served as the construction manager for implementation, and provided consulting and technical assistance.
United States Virgin Islands (USVI)	2017 Hurricanes Irma and Maria	\$1.14 billion	Training and Consultation on program design and implementation, Complete Programmatic Assessment for Housing, and overall technical assistance and training
County of Maui, Hawaii	2023 Wildfires	\$1.6 billion	Training and Consulting on program implementation and technical assistance

• *The Vendor's approach to fulfilling task orders, including how qualified personnel will be identified and assigned:*

The SBP Advisory Services team consists of seasoned professionals who have all previously served in high-level leadership roles as CDBG-DR program grantees. We have run programs, experienced both victories and defeats, and have scars from our failures, yet we persevered to

lead successful CDBG-DR-funded recovery programs. We collectively bring over 50 years of professional service to reduce the time between a natural disaster and recovery. We have experience that counts. We have four full-time CDBG-DR experts and call upon ten on-call 1099 subject matter experts from across the nation to assist us when required. SBP prides itself on responsiveness to grantees.

Under Task Order 8: Program Performance, Monitoring, and Evaluation (including DRGR support), we can provide on-site technical assistance within 10 business days of notification and within two business days for remote consultations. We have previously conducted assessments for numerous grantees and follow a strict protocol of non-disclosure (to the extent permitted by applicable policies and regulations) with our clients. We review all policies, assemble a team of experts who conduct a thorough examination of their respective areas of expertise, and then perform both quantitative and qualitative assessments of the program on-site. We provide actionable objectives to leaders. These typically last 5-7 days on-site and have consistently shown measurable increases in efficiency for the grantee. While HUD monitoring is generally focused on compliance, we prioritize business efficiency, with compliance, outcomes, and timeliness. We aim for a successful recovery and will provide the grantee with specific details to achieve this outcome. Our goal is to increase program efficiency and overall effectiveness in delivering services to disaster survivors.

Under Task Order 10: Audit Readiness and Monitoring Support, we can provide on-site assistance within ten days of notification. This service can also be scheduled on a regular monthly or quarterly recurring basis. We understand that external stressors, including compliance visits and HUD monitoring, can significantly impact an organization. We possess the experience and expertise to ensure these visits are both compliant and executed seamlessly without substantial disruption to program delivery. In our experience, we know it is critical to document compliance and to do so at regular cadence intervals. Our team also understands, from both sides of the table, that there is both an art and a science to monitoring and compliance. Our team of professionals has decades of experience preparing for and successfully navigating audits and monitoring visits as grantees. They also have a decade of experience as HUD leaders, conducting reviews and authoring checklists for grantees. They understand the process deeply, from both sides of the table.

Under Task Order 12: Training and Technical Assistance, we utilize our expertise and experience to provide comprehensive training on all aspects of a CDBG-DR-funded recovery. We have trained over one thousand public administrators from across the nation and its territories who are executing the CDBG-DR grant with the intricacies and lessons learned associated with enterprise-level, area-wide recovery strategy, design, implementation, combined with an extensive knowledge of federal regulations. We provide CDBG-DR expertise in all areas of the program, including strategy options, capacity building, action planning, and amendments, as well as federal cross-cutting requirements and compliance. This expertise also encompasses the implications of 2 CFR 200 on CDBG-DR-funded disaster recovery, including process flow and integration, lessons learned, common pitfalls for grantees, and methods to accelerate recovery. We have expertise in



housing, infrastructure, and economic revitalization, enabling us to meet the national objectives of HUD.

We consider ourselves the thought leader in all aspects of CDBG-DR programs. We offer specialized training through our Disaster Housing Course, which focuses on practical strategies for single-family housing that enhance throughput and enable disaster survivors to return home as quickly and efficiently as possible. We provide Disaster Case Management training with a specific focus on CDBG-DR-funded disasters and integration of DCM activities into the overall program. Our team members possess extensive experience and expertise in CDBG-DR-funded economic revitalization and infrastructure development. We offer additional training services, including LTRG training for newly formed and existing LTRGs supporting recovery efforts. Additionally, we offer a compliance course designed to ensure adherence to federal cross-cutting requirements, 2 CFR 200, and the proper financial management of federal tax dollars. All training and technical assistance programs can be provided in-person or remotely with 30 days' notice.

• Internal systems for quality assurance, regulatory compliance, and project oversight.

We take pride in our ability to coordinate and execute, delivering high-quality and high-utility goods and services to our clients. We do not miss deadlines. We take our professional reputation very seriously, and it is the driving force behind all of our engagements, whether they be programmatic assessments and monitoring, audit and monitoring support, or training and consultation. Our quality control methodology is straightforward and based on these eight principles:

- **Customer Focus:** We recognize the critical nature of this mission for the North Carolina Department of Commerce, and we prioritize providing our best professional advice on all subject areas during all engagements.
- **Leadership:** We are focused on this mission, providing the necessary resources, and meeting all deadlines and customer expectations.
- **People Involvement:** We engage at all levels, listening, thinking, and using data to drive practical solutions.
- **Process Approach:** In our proposal, we advocate for an approach that leads to a clearly defined, repeatable, and valuable product.
- **Systematic Approach to Management:** We strongly believe in over-communicating with our team and clients. We establish strict and demanding timelines, and we meet them.
- **Continuous Improvement:** Our approach is based on listening to our customers while incorporating project management methodologies to ensure repeatable processes that ensure compliance with federal, state, and local laws, as well as timeliness. A successful program must also remain nimble and open to change, adapting to shifting regulatory conditions, evolving community needs, and the possibility of new weather events.

- **Factual Approach to Decision Making:** We recognize that data provides an overview. At the same time, customer and stakeholder engagement offers a more qualitative and in-depth analysis of the facts on the ground. We also recognize the need to give the North Carolina Department of Commerce our most honest and straightforward assessments and professional advice to strengthen the recovery process. We offer recommendations in a data-driven fashion, providing the purpose of each one.
- **Relationship Management:** We focus on the customer, providing what they want and when they need it. We coordinate and communicate effectively, thereby minimizing ambiguity in our business dealings and relationships.

• ***A summary of staffing capacity, including the ability to scale quickly for both short-term and long-term assignments:***

As previously noted, SBP retains subject matter experts on staff and is responsive to customer needs. Each subject matter expert is also responsible for building and teaching their curriculum in our educational offerings. This means they must be up to date on all changes within the disaster recovery system. Additionally, we have valued expertise from our on-call SMEs who provide their knowledge and experience when conducting program monitoring and assessments, audit readiness, and training and consulting services. All of our on-call SMEs offer expertise, and many are still working as grantees on ongoing CDBG-DR programs. We also use them in our teaching and educational offerings, as well as in specific consultations with customers.

Specifically, we possess extensive experience and world-class knowledge in single-family housing programs, economic revitalization, infrastructure project management for mitigation, and compliance management. We can bring all of these full-time experts to assist the customer within a month's timeframe, and in most instances, faster, depending upon scheduling and other work requirements.



The most successful grantees think, act, and behave like a business with strong contracts for their partners and stakeholders in the recovery. Timing is critical. We believe the North Carolina Department of Commerce must complete more than 100 homes per month, as the central key performance indicator for the recovery. This will require a combination of strong performance monitoring and evaluation, as measured and monitored by SBP's programmatic assessments and noted in Task 8. It also requires extensive training and education in all aspects of the CDBG-DR program to achieve a holistic understanding of its purpose and desired outcomes, as noted in our expertise and experience in training, technical assistance, and capacity building in Task 12. Finally, as with all federal programs, it requires audit readiness and monitoring support to ensure effective implementation and compliance with the standards established by your federal partners.

SBP provides expertise in all these areas and can scale quickly to meet the needs and exceed customer expectations. We have the professional staff, the expertise, and the ability to meet

short-term demands to assist the program. If selected to help with this program, the SBP Advise Team will be responsive, cordial, and proactive in fulfilling its task orders.

- ***Clear alignment of proposed staff with the type of work to be performed:***

SBP recognizes the importance of understanding the unique operational practices, standards, and challenges that exist in Western North Carolina. We believe we are especially well-positioned in this regard thanks to the expertise and experience of our team.

If selected as your vendor, we are committed to bringing the additional capacity and expertise needed to support your disaster recovery efforts. Our primary objective is to help enhance your capacity to effectively manage this recovery effort. We will do so through an ethos unique to our organization.

SBP is the thought-leader in all aspects of CDBG-DR disaster recoveries. The professional team of experts on The SBP Advise Team has collectively over 50 years of experience and expertise as grantees. While many consultants have experience and knowledge, they rarely have it as leaders of successful CDBG-DR programs, as grantees. We know the holistic and Herculean effort required to run a program and achieve outcomes. We focus on outcomes, not on effort.

As a matter of professional integrity, we do not engage in bait-and-switch tactics with anyone. We provide our experts, whose resumes and experiences are listed below, and have a deep bench of highly qualified experts in our on-call subject matter expert pool of 1099 employees, who conduct contract work with us due to our industry reputation. We possess significant expertise in program efficiencies and would make a substantial contribution to Task 8: Program Performance, Monitoring, and Evaluation. We have extensive experience and expertise in audit readiness and monitoring support, backed by significant real-world knowledge and experience. Our contributions would greatly benefit Task 10: Audit Readiness and Monitoring Support. Finally, on Task 12, Training and Technical Assistance and Capacity Building, we are thought leaders in CDBG-DR strategy and implementation, having successfully run our own CDBG-DR programs. We offer a range of services, including teaching, training, consulting, technical assistance, and capacity building, drawing on our own experiences and expertise. This expertise enables us to provide engaging and meaningful training and technical assistance to the program, its contractors, and stakeholders.

RESUMES AND BIOS

JR Sanderson | Senior Government Advisor

Contact: jr@sbpusa.org

JR is a retired Army Colonel whose last military assignment was as Chief of Staff for the Army Training Center at Fort Jackson. He designed and led the highly successful South Carolina Disaster Recovery Office in the aftermath of Hurricane Joaquin in 2015 and Hurricane Matthew in 2016. He then planned and developed the Strategy for the Hurricane Florence 2018 recovery and the \$157 million CDBG-Mitigation grant. South Carolina's disaster recovery efforts were record-setting in terms of providing high-quality services to citizens in 22 counties across the state, as well as the overall strategy and swiftness of the recovery. Mr. Sanderson served as the

Chief of Staff of the South Carolina Department of Motor Vehicles before designing and leading the South Carolina Disaster Recovery Office and CDBG-DR/MIT programs. He holds a Master of Public Administration from Western Kentucky University, a Master of Military Arts and Science, and a Master of Strategic Studies. He also has a PhD in Leadership and Organizations from Anderson University. He is a member of the Fort Jackson Hall of Fame. Governor McMaster awarded him the Order of the Palmetto for his efforts in Disaster Recovery for the State of South Carolina.

JR Sanderson has provided action plan strategy assistance, program design assistance, training, and technical assistance to state, local, and nonprofit organizations, including but not limited to:

- City of Columbia, South Carolina: CDBG-DR Program
- State of New Mexico Government and Nonprofits: Disaster Readiness
- State of Alabama Government and Nonprofits: Disaster Readiness
- State of Florida: CDBG-DR Program
- Federation for Appalachian Housing Enterprises: Disaster Recovery Planning
- Foundation for Appalachian Kentucky: Disaster Recovery Planning
- State of Georgia: CDBG-DR Program
- Territory of Puerto Rico: CDBG-DR Program
- Territory of the United States Virgin Islands: CDBG-DR Program
- State of West Virginia: CDBG-DR Program
- State of North Carolina: CDBG-DR Program
- State of Missouri: CDBG-DR Program
- City of Detroit, Michigan: CDBG-DR Program
- City of Dearborn, Michigan: CDBG-DR Program
- State of Michigan: CDBG-DR Program
- State of Texas Government and Nonprofits: CDBG-DR Program and Disaster Readiness
- State of Oklahoma Government and Nonprofits: Disaster Readiness

Sherry Risk | Disaster Advisor

Contact: srisk@sbpusa.org

Sherry Risk began her career in public accounting with a primary focus on taxes and audits. She applied this experience while working in the insurance industry, first as a Medicare cost report auditor in Virginia and West Virginia, and later as Vice President of Strategic Operations at Brickstreet Insurance. During her tenure at Brickstreet, she led the privatization of West Virginia's Workers' Compensation program in strategic planning, information technology, and the project management office. As a result, a \$3 billion deficit State program was transformed into a current company, which is now in its 21st year of rate cuts. Her vast experience with regulations and process improvement has supported numerous initiatives' timely and successful implementations. She served as the City Manager of Charleston, West Virginia. During that time, she implemented new Information Technology Systems and process improvements, which resulted in addressing lagging revenue, efficiencies in city services, and budget deficits. Charleston was able to implement large-scale infrastructure improvements to its riverfront and construct a new baseball stadium. Sherry has 19 years of experience in HUD programs, primarily CDBG and CDBG-DR at the City and State levels. She was instrumental in turning around the struggling West Virginia CDBG-DR program. She is proficient in several project management methodologies, including computer system development, process improvement, construction, grant writing, economic development, program establishment, and product development. Her computer skills include the use of systems such as IDIS, DRGR, HEROs, Google products, Microsoft Office (Word, Excel, Microsoft Project, PowerPoint), GIS, and various specialized computer software systems associated with accounting, insurance, and

government management. She designed and implemented the World Changers project, rehabbing 60 houses in 2 weeks, which won a Housing and Urban Development (HUD) Blue Ribbon Award. During the first Council of State Community Development Agencies (COSCDA) CDBG-DR clinic, she served on the curriculum development committee and as an instructor. She successfully wrote and implemented four U.S. Treasury Opportunity Zones to bolster economic development. Moreover, developed collaborative partnerships with FEMA, USACE, EDA, DOT, and local EMDs to leverage funding and foster partnerships.

- State of West Virginia and West Virginia CDBG entitlement jurisdictions
- State of North Carolina
- Puerto Rico, US Territory
- State of New Mexico
- Commonwealth of Kentucky
- State of Massachusetts
- State of Mississippi and Coastal Mississippi
- State of California
- State of Nebraska
- State of South Carolina, Charleston, Berkeley, and Dorchester Counties
- County of Maui, Hawaii
- San Francisco, Los Angeles, San Diego - Long Term Recovery Training (LTRG)
- Montpelier, Vermont - Long Term Recovery Training (LTRG)
- Sanibel Island, Lee County, Florida
- Mobile and County of Mobile, Alabama
- Hillsborough County, Florida
- State of Texas
- Western Pennsylvania CDBG entitlements

Aaron Gagné | Government Advisor

Contact: agagne@sbpusa.org

Before joining the SBP Advise team, Aaron Gagné built a career spanning over three decades in community and economic development at all levels of the public sector. From rust-belt communities in the Northeast to rapidly growing communities on the High Plains, and from transportation challenges in national parks to housing for the most vulnerable in society, he led teams, cultivated resources, built partnerships, and delivered results. Aaron held Director-level positions in Canandaigua and Livingston County, New York, overseeing federal and state grant programs, major infrastructure programs, and large-scale economic development initiatives. He also held Director-level positions in Westminster and Aurora, Colorado, where he headed large-scale HUD-funded programs, including housing redevelopment, urban renewal, and transit-oriented development.

Transitioning to federal service, Aaron led the HUD Community Planning and Development program for the entire 6-state Rocky Mountain Region, including all CPD grant programs. With a portfolio of almost 200 grantees and cross-cutting compliance responsibilities for all programs, his movement and engagement with grantees were non-stop to meet the needs of communities large and small. Then, when the Office of Disaster Recovery was created, he had oversight of grants across the entire portfolio. He was consistently called on to teach, train, and develop internal staff and grantees. Frequently on the road, he was a constant troubleshooter for grant programs, helping them through initial stand-up phases, guiding them through program delivery challenges, and assisting in closing out grants at the conclusion. CDBG-DR and CDBG-MIT grants managed and directly provided technical assistance to include:

- | | |
|--|--|
| <ul style="list-style-type: none"> • Alabama • California • Chicago • Colorado • Columbia • Cook County • Dearborn • Detroit • DuPage County • Florida • Georgia • Guam • Hawaii • Illinois • Indiana • Iowa | <ul style="list-style-type: none"> • Kentucky • Lee County • Lexington County • Michigan • Minot • Nashville-Davidson • New Jersey • New York City • New York State • North Carolina • Puerto Rico • Richland County • South Carolina • St. Clair County • Texas • United States Virgin Islands (USVI) • Volusia County |
|--|--|

Maria Gonzalez | Advise Education Manager

Contact: mgonzalez@sbpusa.org

Maria Gonzalez brings 7 years of experience in Disaster Case Management. She began her career with the State of South Carolina Disaster Recovery Office (SCDRO) under the FEMA DCMP grant, serving as a Case Manager for the 2016 and 2018 South Carolina storms. During her time with SCDRO/FEMA DCMP, Maria advanced to the Disaster Case Manager Lead and Resource Coordinator role, where she collaborated with long-term recovery groups, faith-based organizations, steering committees, and other agencies to address unmet client needs. In 2018, Maria transitioned to a Supervisor, managing a team of 10 Disaster Case Managers. By 2020, she joined SBP as a Case Management Director, overseeing a CDBG-DR grant for the 2015 floods. In this role, she developed a Disaster Case Management curriculum and shared her expertise across multiple states, including Kentucky, Florida, Hawaii, and North Carolina. Maria's passion for helping disaster-affected communities also led her to serve as an active Disaster Case Manager Reservist for the South Carolina Office of Resilience. Her commitment to recovery and resilience continues to make a lasting impact. Maria leads our Disaster Case Management course, where she has trained and provided technical assistance to state, local, and nonprofit organizations, including but not limited to:

- City of Bowling Green, KY: Neighborhood & Community Services
- Hazard, Kentucky: LKLP Community Action
- Eastern and Central Kentucky
- DeSoto County Floriday
- North Carolina Office of Recovery and Resiliency
- County of Maui, Hawaii: American Red Cross
- Voluisa County, FL: Recovery and Resilience (Transform 386)
- Sarasota County, FL: Resilient SRQ
- Lee County, Florida: American Red Cross, United Way of Lee, Hendry & Glades, F.I.S.H of Sancap
- Eastern Tennessee: HomeSource

Joshua Bryant | Disaster Recovery Advisor**Contact:** (334) 332-2610, jbryant@sbpusa.org

Joshua Bryant is SBP's Disaster Recovery Advisor, helping to lead SBP's work with state and local governments immediately following disasters. He provides technical guidance related to disaster grant programs and the applicable laws, regulations, and policies governing emergency management.

Joshua has 15 years of experience in emergency management. Before joining SBP, he worked for the Texas Division of Emergency Management (TDEM), where he most recently served as the Recovery Division Chief for the State of Texas. In this role, his team was responsible for coordinating with federal partners and supporting local governments in delivering the FEMA Individual Assistance and Public Assistance Programs across 18 open major disasters, totaling over \$22 billion in eligible grant funds.

During his tenure in TDEM's Recovery Division, his team led statewide recovery efforts for major disasters, including Hurricane Harvey, the COVID-19 pandemic, Winter Storm Uri, and numerous other events. Joshua's team also led recovery operations during all disasters in Texas by supporting the Texas State Operations Center, coordinating resources, and conducting damage assessments across the state.

Before joining the Recovery team, he served for over five years in TDEM's Preparedness Division, leading state-level planning for response and recovery efforts across all natural and technological hazards. Before joining TDEM, he served in the United States Coast Guard.

Joshua has provided regulatory, program, and policy training and guidance about disaster response recovery processes to numerous public and private sector partners, including:

- SBP Fellow Community Partners Across the United States
- The City of Mobile, AL's Office of Resilience and Mobile County Emergency Management
- The Florida Division of Emergency Management
- The New Mexico Department of Homeland Security & Emergency Management
- The State of West Virginia
- State and Local Government Entities across the State of Texas
- Member organizations of the Texas Emergency Management Council include thirty state agencies, six state higher education institutions, and three volunteer groups serving all of Texas in the Event of Disasters.
- Representatives who are responsible for over 1,200 public independent school districts in Texas during COVID-19 and Winter Storm Uri.
- Nonprofit Organizations, including Western North Carolina Communities, Housing Assistance Corporation, the American Red Cross, and AARP.

SECTION 4.11: FINANCIAL DOCUMENTATION



THE ST. BERNARD PROJECT, INC.
D/B/A SBP, INC.
CONSOLIDATED FINANCIAL STATEMENTS

December 31, 2022 and 2021

UNIFORM GUIDANCE COMPLIANCE AND
GOVERNMENT AUDITING STANDARDS REPORTS



THE ST. BERNARD PROJECT, INC.
D/B/A SBP, INC.
CONSOLIDATED FINANCIAL STATEMENTS

December 31, 2023 and 2022

UNIFORM GUIDANCE COMPLIANCE AND
GOVERNMENT AUDITING STANDARDS REPORTS



THE ST. BERNARD PROJECT, INC.
D/B/A SBP, INC.
CONSOLIDATED FINANCIAL STATEMENTS

December 31, 2024 and 2023

UNIFORM GUIDANCE COMPLIANCE AND
GOVERNMENT AUDITING STANDARDS REPORTS

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

EXHIBIT A: TASK ORDER CATEGORIES/PRICING**PRICING**

VENDOR REPLICATED PRICING TABLE FROM PROPOSAL NUMBER: Doc1677946894 PROVIDING AN HOURLY NOT-TO-EXCEED RATE PER POSITION FOR EACH TASK ORDER CATEGORY(S) OFFERED WITH ITS SOLICITATION RESPONSE.

TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 8 – PROGRAM PERFORMANCE MONITORING AND EVALUATION			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31
TASK 10 – AUDIT READINESS AND MONITORING SUPPORT			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31
TASK 12 – TRAINING, TECHNICAL ASSISTANCE, AND CAPACITY BUILDING			
SENIOR GOVERNMENT ADVISOR	\$196.69	\$210.46	\$225.19
GOVERNMENT ADVISOR	\$175.83	\$188.14	\$201.31
ADVISE EDUCATION MANAGER	\$175.83	\$188.14	\$201.31

ATTACHMENT D: LOCATION OF WORKERS UTILIZED BY VENDOR

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

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

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

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

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

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

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

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

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, The Saint Bernard Project, Inc. dba SBP, 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

JR Sanderson, Senior Government Advisor
Name and Title of Vendor's Authorized Official

9/2/2025

Date

ATTACHMENT G: DISCLOSURE OF LOBBYING ACTIVITIES

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

SBP does not engage in lobbying activities in North Carolina.

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:	North Carolina Office of Resilience and Recovery (NCORR)
Program:	SBP served as a named Subrecipient in a subrecipient agreement.
Brief Description of Services Rendered:	SBP provided weekly consultations on construction contracts, construction throughput, technical assistance, and training for the NCORR Team, educating them in a wide variety of CDBG-DR-related areas, including 2 CFR 200, Federal Cross-Cutting Compliance, and methods to accelerate construction. SBP's consulting efforts significantly increased the monthly average of homes completed, from 44 per month to over 120 per month.

Example 2	
Client Name:	Hillsborough County, Florida
Program:	Program-wide strategy, training, implementation design, and writing the Action Plan for the County.
Brief Description of Services Rendered:	SBP provided Hillsborough County with a 3-day training seminar/workshop on program design and implementation. Subsequently, SBP wrote and coordinated the Action Plan (along with the Unmet Needs Assessment) for County Council briefings and submission to HUD for approval.

Example 3	
Client Name:	Puerto Rico, US Territory
Program:	Training, education, and consulting services as a named subrecipient.
Brief Description of Services Rendered:	SBP has provided numerous services for the Puerto Rico CDBG-DR program. We have trained all key staff on CDBG-DR programs and federal cross-cutting requirements. We have also provided consulting services on complex financial issues.