

Contract Award

Contract Number:	Doc1677946894
Contract Description:	Staff Augmentation
Vendor:	Witt O'Brien's

Task Order Categories Awarded:

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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

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

TASK 10 – Audit Readiness and Monitoring Support

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

TASK 12 – Training, Technical Assistance, and Capacity Building

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

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

2. SIGNED EXECUTION PAGES AND SIGNED ADDENDA

DocuSign Envelope ID: 4209A3B6-835B-443D-8FA2-D6C098DBDDE5

STATE OF NORTH CAROLINA <i>Division of Community Revitalization (DCR)</i>	
Refer <u>ALL</u> Inquiries regarding this RFP to: angela.dunaway@commerce.nc.gov	Request for Proposals # Doc1677946894
Using Agency: North Carolina Department of Commerce, Division of Community Revitalization	Proposals will be publicly opened: September 4, 2025, at 2:00 pm ET
	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: Witt O'Brien's, LLC		
STREET ADDRESS: 818 Town and Country Blvd., Suite 200	P.O. BOX:	ZIP:
CITY & STATE & ZIP: Houston, TX 77024	TELEPHONE NUMBER: 281-320-9796	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Cheryl Joiner, Director of Contracts and Compliance		FAX NUMBER: 281-320-9700
VENDOR'S AUTHORIZED SIGNATURE: 	DATE: 09/09/2025	EMAIL: contractrequests@wittobriens.com

Proposal Number: Doc1677946894

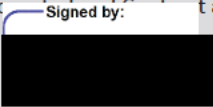
Vendor: _____

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 certification, by  (Authorized Representative of Department of Commerce).



**NC DEPARTMENT
of COMMERCE**
COMMUNITY REVITALIZATION

Josh Stein
GOVERNOR

Lee Lilley
SECRETARY

Stephanie McGarrah
DEPUTY SECRETARY

Request for Offer Extension

Solicitation Number: Doc1677946894

Solicitation Description: Staff Augmentation

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

Issue Date Request for Offer Extension: December 5, 2025

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

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


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

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

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

Sign Request for Offer Extension:

Offer (Vendor Name): Witt O'Brien's, LLC

Authorized Signature: 

Name and Title: Cheryl Joiner Director of Contracts & Compliance

Date: 12/8/2025

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 othersimilar 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 Operationg Procedures (SOPs)			
Project Manager (Virtual Rate)	\$ 286.00	\$ 286.00	\$ 286.00
Deputy Project Manager (Virtual Rate)	\$ 227.00	\$ 227.00	\$ 227.00
Management Consultant V (Virtual Rate)	\$ 225.00	\$ 225.00	\$ 225.00
Management Consultant IV (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00
Management Consultant III (Virtual Rate)	\$ 150.00	\$ 150.00	\$ 150.00
Management Consultant II (Virtual Rate)	\$ 120.00	\$ 120.00	\$ 120.00
Management Consultant I (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00
Data Analyst III (Virtual Rate)	\$ 150.00	\$ 150.00	\$ 150.00
Data Analyst II (Virtual Rate)	\$ 130.00	\$ 130.00	\$ 130.00
Data Analyst I (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00
Financial Analyst III (Virtual Rate)	\$ 190.00	\$ 190.00	\$ 190.00
Financial Analyst II (Virtual Rate)	\$ 150.00	\$ 150.00	\$ 150.00
Financial Analyst I (Virtual Rate)	\$ 120.00	\$ 120.00	\$ 120.00
Administrative Support Specialist III (Virtual Rate)	\$ 141.00	\$ 141.00	\$ 141.00
Administrative Support Specialist II (Virtual Rate)	\$ 117.00	\$ 117.00	\$ 117.00
Administrative Support Specialist I (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00
Eligibility Review Manager II (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00
Eligibility Review Manager I (Virtual Rate)	\$ 135.00	\$ 135.00	\$ 135.00
Eligibility Review Specialist III (Virtual Rate)	\$ 125.00	\$ 125.00	\$ 125.00
Eligibility Review Specialist II (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00
Eligibility Review Specialist I (Virtual Rate)	\$ 75.00	\$ 75.00	\$ 75.00
Contact & Customer Service Manager II (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00
Contact & Customer Service Manager I (Virtual Rate)	\$ 135.00	\$ 135.00	\$ 135.00
Contact & Customer Service Specialist III (Virtual Rate)	\$ 65.00	\$ 65.00	\$ 65.00
Contact & Customer Service Specialist II (Virtual Rate)	\$ 55.00	\$ 55.00	\$ 55.00
Contact & Customer Service Specialist I (Virtual Rate)	\$ 45.00	\$ 45.00	\$ 45.00
Technology Technical Senior Advisor (Virtual Rate)	\$ 325.00	\$ 325.00	\$ 325.00
Technology Technical Architect (Virtual Rate)	\$ 250.00	\$ 250.00	\$ 250.00
Technology Technical Lead (Virtual Rate)	\$ 250.00	\$ 250.00	\$ 250.00
Technology Technical Developer III (Virtual Rate)	\$ 200.00	\$ 200.00	\$ 200.00
Technology Technical Developer II (Virtual Rate)	\$ 180.00	\$ 180.00	\$ 180.00
Technology Technical Developer I (Virtual Rate)	\$ 155.00	\$ 155.00	\$ 155.00
Project Manager (On-Site Rate)	\$ 322.95	\$ 322.95	\$ 322.95
Deputy Project Manager (On-Site Rate)	\$ 263.95	\$ 263.95	\$ 263.95
Management Consultant V (On-Site Rate)	\$ 261.95	\$ 261.95	\$ 261.95
Management Consultant IV (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95
Management Consultant III (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95
Management Consultant II (On-Site Rate)	\$ 156.95	\$ 156.95	\$ 156.95
Management Consultant I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95
Data Analyst III (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95
Data Analyst II (On-Site Rate)	\$ 166.95	\$ 166.95	\$ 166.95
Data Analyst I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95
Financial Analyst III (On-Site Rate)	\$ 226.95	\$ 226.95	\$ 226.95
Financial Analyst II (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95
Financial Analyst I (On-Site Rate)	\$ 156.95	\$ 156.95	\$ 156.95
Administrative Support Specialist III (On-Site Rate)	\$ 177.95	\$ 177.95	\$ 177.95
Administrative Support Specialist II (On-Site Rate)	\$ 153.95	\$ 153.95	\$ 153.95
Administrative Support Specialist I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95
Eligibility Review Manager II (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95
Eligibility Review Manager I (On-Site Rate)	\$ 171.95	\$ 171.95	\$ 171.95
Eligibility Review Specialist III (On-Site Rate)	\$ 161.95	\$ 161.95	\$ 161.95
Eligibility Review Specialist II (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95
Eligibility Review Specialist I (On-Site Rate)	\$ 111.95	\$ 111.95	\$ 111.95
Contact & Customer Service Manager II (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95
Contact & Customer Service Manager I (On-Site Rate)	\$ 171.95	\$ 171.95	\$ 171.95
Contact & Customer Service Specialist III (On-Site Rate)	\$ 101.95	\$ 101.95	\$ 101.95
Contact & Customer Service Specialist II (On-Site Rate)	\$ 91.95	\$ 91.95	\$ 91.95
Contact & Customer Service Specialist I (On-Site Rate)	\$ 81.95	\$ 81.95	\$ 81.95
Technology Technical Senior Advisor (On-Site Rate)	\$ 361.95	\$ 361.95	\$ 361.95
Technology Technical Architect (On-Site Rate)	\$ 286.95	\$ 286.95	\$ 286.95
Technology Technical Lead (On-Site Rate)	\$ 286.95	\$ 286.95	\$ 286.95
Technology Technical Developer III (On-Site Rate)	\$ 236.95	\$ 236.95	\$ 236.95
Technology Technical Developer II (On-Site Rate)	\$ 216.95	\$ 216.95	\$ 216.95
Technology Technical Developer I (On-Site Rate)	\$ 191.95	\$ 191.95	\$ 191.95
TASK 2 - Financial Compliance, Oversight, and Fraud Prevention			
Project Manager (Virtual Rate)	\$ 286.00	\$ 286.00	\$ 286.00
Deputy Project Manager (Virtual Rate)	\$ 227.00	\$ 227.00	\$ 227.00
Management Consultant V (Virtual Rate)	\$ 225.00	\$ 225.00	\$ 225.00
Management Consultant IV (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00
Management Consultant III (Virtual Rate)	\$ 150.00	\$ 150.00	\$ 150.00

Project Ma	Project Pri	\$ 286.00	TRUE
Deputy Pro	Project Ma	\$ 227.00	TRUE
Managemen	Subject Ma	\$ 225.00	TRUE
Managemen	Subject Ma	\$ 175.00	TRUE
Managemen	Subject Ma	\$ 150.00	TRUE
Managemen	Subject Ma	\$ 120.00	TRUE
Managemen	Subject Ma	\$ 95.00	TRUE
Data Analy	Subject Ma	\$ 150.00	TRUE
Data Analy	Subject Ma	\$ 130.00	TRUE
Data Analy	Subject Ma	\$ 95.00	TRUE
Financial A	Subject Ma	\$ 190.00	TRUE
Financial A	Subject Ma	\$ 150.00	TRUE
Financial A	Subject Ma	\$ 120.00	TRUE
Administra	Subject Ma	\$ 141.00	TRUE
Administra	Subject Ma	\$ 117.00	TRUE
Administra	Subject Ma	\$ 95.00	TRUE
Eligibility R	Subject Ma	\$ 175.00	TRUE
Eligibility R	Subject Ma	\$ 135.00	TRUE
Eligibility R	Subject Ma	\$ 125.00	TRUE
Eligibility R	Subject Ma	\$ 95.00	TRUE
Eligibility R	Subject Ma	\$ 75.00	TRUE
Contact &	Subject Ma	\$ 175.00	TRUE
Contact &	Subject Ma	\$ 135.00	TRUE
Contact &	Subject Ma	\$ 65.00	TRUE
Contact &	Subject Ma	\$ 55.00	TRUE
Contact &	Subject Ma	\$ 45.00	TRUE
Technology	Subject Ma	\$ 325.00	TRUE
Technology	Subject Ma	\$ 250.00	TRUE
Technology	Subject Ma	\$ 250.00	TRUE
Technology	Subject Ma	\$ 200.00	TRUE
Technology	Subject Ma	\$ 180.00	TRUE
Technology	Subject Ma	\$ 155.00	TRUE
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		156.95	TRUE
		131.95	TRUE
		186.95	TRUE
		166.95	TRUE
		131.95	TRUE
		226.95	TRUE
		186.95	TRUE
		156.95	TRUE
		177.95	TRUE
		153.95	TRUE
		131.95	TRUE
		211.95	TRUE
		171.95	TRUE
		161.95	TRUE
		131.95	TRUE
		111.95	TRUE
		211.95	TRUE
		171.95	TRUE
		101.95	TRUE
		91.95	TRUE
		81.95	TRUE
		361.95	TRUE
		286.95	TRUE
		286.95	TRUE
		236.95	TRUE
		216.95	TRUE
		191.95	TRUE
			TRUE
		\$ 286.00	TRUE
		\$ 227.00	TRUE
		\$ 225.00	TRUE
		\$ 175.00	TRUE
		\$ 150.00	TRUE

Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 3 - Duplication of Benefits (DOB) Compliance								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE

Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 4 - Procurement Compliance and Monitoring								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE

<i>Data Analyst I (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Financial Analyst III (On-Site Rate)</i>	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
<i>Financial Analyst II (On-Site Rate)</i>	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
<i>Financial Analyst I (On-Site Rate)</i>	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
<i>Administrative Support Specialist III (On-Site Rate)</i>	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
<i>Administrative Support Specialist II (On-Site Rate)</i>	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
<i>Administrative Support Specialist I (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Eligibility Review Manager II (On-Site Rate)</i>	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
<i>Eligibility Review Manager I (On-Site Rate)</i>	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
<i>Eligibility Review Specialist III (On-Site Rate)</i>	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
<i>Eligibility Review Specialist II (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Eligibility Review Specialist I (On-Site Rate)</i>	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
<i>Contact & Customer Service Manager II (On-Site Rate)</i>	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
<i>Contact & Customer Service Manager I (On-Site Rate)</i>	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
<i>Contact & Customer Service Specialist III (On-Site Rate)</i>	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
<i>Contact & Customer Service Specialist II (On-Site Rate)</i>	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
<i>Contact & Customer Service Specialist I (On-Site Rate)</i>	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
<i>Technology Technical Senior Advisor (On-Site Rate)</i>	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
<i>Technology Technical Architect (On-Site Rate)</i>	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
<i>Technology Technical Lead (On-Site Rate)</i>	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
<i>Technology Technical Developer III (On-Site Rate)</i>	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
<i>Technology Technical Developer II (On-Site Rate)</i>	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
<i>Technology Technical Developer I (On-Site Rate)</i>	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 5 - Claims, Appeals, and Case Reviews								TRUE
<i>Project Manager (Virtual Rate)</i>	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
<i>Deputy Project Manager (Virtual Rate)</i>	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
<i>Management Consultant V (Virtual Rate)</i>	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
<i>Management Consultant IV (Virtual Rate)</i>	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
<i>Management Consultant III (Virtual Rate)</i>	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
<i>Management Consultant II (Virtual Rate)</i>	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
<i>Management Consultant I (Virtual Rate)</i>	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
<i>Data Analyst III (Virtual Rate)</i>	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
<i>Data Analyst II (Virtual Rate)</i>	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
<i>Data Analyst I (Virtual Rate)</i>	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
<i>Financial Analyst III (Virtual Rate)</i>	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
<i>Financial Analyst II (Virtual Rate)</i>	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
<i>Financial Analyst I (Virtual Rate)</i>	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
<i>Administrative Support Specialist III (Virtual Rate)</i>	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
<i>Administrative Support Specialist II (Virtual Rate)</i>	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
<i>Administrative Support Specialist I (Virtual Rate)</i>	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
<i>Eligibility Review Manager II (Virtual Rate)</i>	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
<i>Eligibility Review Manager I (Virtual Rate)</i>	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
<i>Eligibility Review Specialist III (Virtual Rate)</i>	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
<i>Eligibility Review Specialist II (Virtual Rate)</i>	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
<i>Eligibility Review Specialist I (Virtual Rate)</i>	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
<i>Contact & Customer Service Manager II (Virtual Rate)</i>	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
<i>Contact & Customer Service Manager I (Virtual Rate)</i>	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
<i>Contact & Customer Service Specialist III (Virtual Rate)</i>	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
<i>Contact & Customer Service Specialist II (Virtual Rate)</i>	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
<i>Contact & Customer Service Specialist I (Virtual Rate)</i>	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
<i>Technology Technical Senior Advisor (Virtual Rate)</i>	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
<i>Technology Technical Architect (Virtual Rate)</i>	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
<i>Technology Technical Lead (Virtual Rate)</i>	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
<i>Technology Technical Developer III (Virtual Rate)</i>	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
<i>Technology Technical Developer II (Virtual Rate)</i>	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
<i>Technology Technical Developer I (Virtual Rate)</i>	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
<i>Project Manager (On-Site Rate)</i>	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
<i>Deputy Project Manager (On-Site Rate)</i>	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
<i>Management Consultant V (On-Site Rate)</i>	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
<i>Management Consultant IV (On-Site Rate)</i>	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
<i>Management Consultant III (On-Site Rate)</i>	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
<i>Management Consultant II (On-Site Rate)</i>	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
<i>Management Consultant I (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Data Analyst III (On-Site Rate)</i>	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
<i>Data Analyst II (On-Site Rate)</i>	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
<i>Data Analyst I (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Financial Analyst III (On-Site Rate)</i>	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
<i>Financial Analyst II (On-Site Rate)</i>	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
<i>Financial Analyst I (On-Site Rate)</i>	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
<i>Administrative Support Specialist III (On-Site Rate)</i>	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
<i>Administrative Support Specialist II (On-Site Rate)</i>	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
<i>Administrative Support Specialist I (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Eligibility Review Manager II (On-Site Rate)</i>	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
<i>Eligibility Review Manager I (On-Site Rate)</i>	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
<i>Eligibility Review Specialist III (On-Site Rate)</i>	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
<i>Eligibility Review Specialist II (On-Site Rate)</i>	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
<i>Eligibility Review Specialist I (On-Site Rate)</i>	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
<i>Contact & Customer Service Manager II (On-Site Rate)</i>	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
<i>Contact & Customer Service Manager I (On-Site Rate)</i>	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
<i>Contact & Customer Service Specialist III (On-Site Rate)</i>	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
<i>Contact & Customer Service Specialist II (On-Site Rate)</i>	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
<i>Contact & Customer Service Specialist I (On-Site Rate)</i>	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
<i>Technology Technical Senior Advisor (On-Site Rate)</i>	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE

Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 6 – Action Plan Development and Amendments								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE

Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 8 - Program Performance Monitoring and Evaluation								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE

Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 9 - Civil Rights, Fair Housing, Labor Standaards, and Historic Preservation								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE

Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 10 - Audit Readiness and Monitoring Support								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 11 - Technical and Engineering Support for Infrastructure and Housing Projects								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE

Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 12 - Training, Technical Assistance, and Capacity Building								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE

Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 13 - Relocation Program Development and Compliance Support								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE

Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 14 - Communication, Public Information, and Outreach Support								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE

Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 15 - Grant Management								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Data Analyst II (Virtual Rate)	\$	130.00	\$	130.00	\$	130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$	190.00	\$	190.00	\$	190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$	141.00	\$	141.00	\$	141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$	117.00	\$	117.00	\$	117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$	125.00	\$	125.00	\$	125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$	75.00	\$	75.00	\$	75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$	135.00	\$	135.00	\$	135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$	65.00	\$	65.00	\$	65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$	55.00	\$	55.00	\$	55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$	45.00	\$	45.00	\$	45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$	325.00	\$	325.00	\$	325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$	250.00	\$	250.00	\$	250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$	200.00	\$	200.00	\$	200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$	180.00	\$	180.00	\$	180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$	155.00	\$	155.00	\$	155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$	322.95	\$	322.95	\$	322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$	263.95	\$	263.95	\$	263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$	261.95	\$	261.95	\$	261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$	166.95	\$	166.95	\$	166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$	226.95	\$	226.95	\$	226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$	186.95	\$	186.95	\$	186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$	156.95	\$	156.95	\$	156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$	177.95	\$	177.95	\$	177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$	153.95	\$	153.95	\$	153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$	161.95	\$	161.95	\$	161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$	131.95	\$	131.95	\$	131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$	111.95	\$	111.95	\$	111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$	211.95	\$	211.95	\$	211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$	171.95	\$	171.95	\$	171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$	101.95	\$	101.95	\$	101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$	91.95	\$	91.95	\$	91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$	81.95	\$	81.95	\$	81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$	361.95	\$	361.95	\$	361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$	286.95	\$	286.95	\$	286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$	236.95	\$	236.95	\$	236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$	216.95	\$	216.95	\$	216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$	191.95	\$	191.95	\$	191.95	191.95	TRUE
TASK 16 - Technical Systems Specification & Project Management								TRUE
Project Manager (Virtual Rate)	\$	286.00	\$	286.00	\$	286.00	\$ 286.00	TRUE
Deputy Project Manager (Virtual Rate)	\$	227.00	\$	227.00	\$	227.00	\$ 227.00	TRUE
Management Consultant V (Virtual Rate)	\$	225.00	\$	225.00	\$	225.00	\$ 225.00	TRUE
Management Consultant IV (Virtual Rate)	\$	175.00	\$	175.00	\$	175.00	\$ 175.00	TRUE
Management Consultant III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE
Management Consultant II (Virtual Rate)	\$	120.00	\$	120.00	\$	120.00	\$ 120.00	TRUE
Management Consultant I (Virtual Rate)	\$	95.00	\$	95.00	\$	95.00	\$ 95.00	TRUE
Data Analyst III (Virtual Rate)	\$	150.00	\$	150.00	\$	150.00	\$ 150.00	TRUE

Data Analyst II (Virtual Rate)	\$ 130.00	\$ 130.00	\$ 130.00	\$ 130.00	TRUE
Data Analyst I (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00	\$ 95.00	TRUE
Financial Analyst III (Virtual Rate)	\$ 190.00	\$ 190.00	\$ 190.00	\$ 190.00	TRUE
Financial Analyst II (Virtual Rate)	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	TRUE
Financial Analyst I (Virtual Rate)	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	TRUE
Administrative Support Specialist III (Virtual Rate)	\$ 141.00	\$ 141.00	\$ 141.00	\$ 141.00	TRUE
Administrative Support Specialist II (Virtual Rate)	\$ 117.00	\$ 117.00	\$ 117.00	\$ 117.00	TRUE
Administrative Support Specialist I (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00	\$ 95.00	TRUE
Eligibility Review Manager II (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	TRUE
Eligibility Review Manager I (Virtual Rate)	\$ 135.00	\$ 135.00	\$ 135.00	\$ 135.00	TRUE
Eligibility Review Specialist III (Virtual Rate)	\$ 125.00	\$ 125.00	\$ 125.00	\$ 125.00	TRUE
Eligibility Review Specialist II (Virtual Rate)	\$ 95.00	\$ 95.00	\$ 95.00	\$ 95.00	TRUE
Eligibility Review Specialist I (Virtual Rate)	\$ 75.00	\$ 75.00	\$ 75.00	\$ 75.00	TRUE
Contact & Customer Service Manager II (Virtual Rate)	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	TRUE
Contact & Customer Service Manager I (Virtual Rate)	\$ 135.00	\$ 135.00	\$ 135.00	\$ 135.00	TRUE
Contact & Customer Service Specialist III (Virtual Rate)	\$ 65.00	\$ 65.00	\$ 65.00	\$ 65.00	TRUE
Contact & Customer Service Specialist II (Virtual Rate)	\$ 55.00	\$ 55.00	\$ 55.00	\$ 55.00	TRUE
Contact & Customer Service Specialist I (Virtual Rate)	\$ 45.00	\$ 45.00	\$ 45.00	\$ 45.00	TRUE
Technology Technical Senior Advisor (Virtual Rate)	\$ 325.00	\$ 325.00	\$ 325.00	\$ 325.00	TRUE
Technology Technical Architect (Virtual Rate)	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	TRUE
Technology Technical Lead (Virtual Rate)	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	TRUE
Technology Technical Developer III (Virtual Rate)	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	TRUE
Technology Technical Developer II (Virtual Rate)	\$ 180.00	\$ 180.00	\$ 180.00	\$ 180.00	TRUE
Technology Technical Developer I (Virtual Rate)	\$ 155.00	\$ 155.00	\$ 155.00	\$ 155.00	TRUE
Project Manager (On-Site Rate)	\$ 322.95	\$ 322.95	\$ 322.95	322.95	TRUE
Deputy Project Manager (On-Site Rate)	\$ 263.95	\$ 263.95	\$ 263.95	263.95	TRUE
Management Consultant V (On-Site Rate)	\$ 261.95	\$ 261.95	\$ 261.95	261.95	TRUE
Management Consultant IV (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95	211.95	TRUE
Management Consultant III (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95	186.95	TRUE
Management Consultant II (On-Site Rate)	\$ 156.95	\$ 156.95	\$ 156.95	156.95	TRUE
Management Consultant I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95	131.95	TRUE
Data Analyst III (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95	186.95	TRUE
Data Analyst II (On-Site Rate)	\$ 166.95	\$ 166.95	\$ 166.95	166.95	TRUE
Data Analyst I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95	131.95	TRUE
Financial Analyst III (On-Site Rate)	\$ 226.95	\$ 226.95	\$ 226.95	226.95	TRUE
Financial Analyst II (On-Site Rate)	\$ 186.95	\$ 186.95	\$ 186.95	186.95	TRUE
Financial Analyst I (On-Site Rate)	\$ 156.95	\$ 156.95	\$ 156.95	156.95	TRUE
Administrative Support Specialist III (On-Site Rate)	\$ 177.95	\$ 177.95	\$ 177.95	177.95	TRUE
Administrative Support Specialist II (On-Site Rate)	\$ 153.95	\$ 153.95	\$ 153.95	153.95	TRUE
Administrative Support Specialist I (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95	131.95	TRUE
Eligibility Review Manager II (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95	211.95	TRUE
Eligibility Review Manager I (On-Site Rate)	\$ 171.95	\$ 171.95	\$ 171.95	171.95	TRUE
Eligibility Review Specialist III (On-Site Rate)	\$ 161.95	\$ 161.95	\$ 161.95	161.95	TRUE
Eligibility Review Specialist II (On-Site Rate)	\$ 131.95	\$ 131.95	\$ 131.95	131.95	TRUE
Eligibility Review Specialist I (On-Site Rate)	\$ 111.95	\$ 111.95	\$ 111.95	111.95	TRUE
Contact & Customer Service Manager II (On-Site Rate)	\$ 211.95	\$ 211.95	\$ 211.95	211.95	TRUE
Contact & Customer Service Manager I (On-Site Rate)	\$ 171.95	\$ 171.95	\$ 171.95	171.95	TRUE
Contact & Customer Service Specialist III (On-Site Rate)	\$ 101.95	\$ 101.95	\$ 101.95	101.95	TRUE
Contact & Customer Service Specialist II (On-Site Rate)	\$ 91.95	\$ 91.95	\$ 91.95	91.95	TRUE
Contact & Customer Service Specialist I (On-Site Rate)	\$ 81.95	\$ 81.95	\$ 81.95	81.95	TRUE
Technology Technical Senior Advisor (On-Site Rate)	\$ 361.95	\$ 361.95	\$ 361.95	361.95	TRUE
Technology Technical Architect (On-Site Rate)	\$ 286.95	\$ 286.95	\$ 286.95	286.95	TRUE
Technology Technical Lead (On-Site Rate)	\$ 286.95	\$ 286.95	\$ 286.95	286.95	TRUE
Technology Technical Developer III (On-Site Rate)	\$ 236.95	\$ 236.95	\$ 236.95	236.95	TRUE
Technology Technical Developer II (On-Site Rate)	\$ 216.95	\$ 216.95	\$ 216.95	216.95	TRUE
Technology Technical Developer I (On-Site Rate)	\$ 191.95	\$ 191.95	\$ 191.95	191.95	TRUE
TASK 17 - Environmental Review*	UNIT COST	UNIT COST	UNIT COST		FALSE
Initial Environmental Review					
Exempt	\$ 500.00	\$ 500.00	\$ 500.00		
Categorically Excluded Not Subject to §58.5	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00		
Categorically Excluded Subject to §58.5	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00		
Environmental Assessment (low-medium complexity)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00		
Environmental Assessment (high complexity)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00		
Environmental Impact Statements (low-medium complexity)	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00		
Environmental Impact Statements (high complexity)	\$ 6,000.00	\$ 6,000.00	\$ 60,000.00		
Reevaluation Environmental Review:					
Exempt	\$ 500.00	\$ 500.00	\$ 500.00		
Categorically Excluded Not Subject to §58.5 (low-medium complexity)	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00		
Categorically Excluded Not Subject to §58.5 (high complexity)	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00		
Categorically Excluded Subject to §58.5 (low-medium complexity)	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
Categorically Excluded Subject to §58.5 (high complexity)	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00		
Environmental Assessment (low-medium complexity)	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00		
Environmental Assessment (high complexity)	\$ 13,000.00	\$ 13,000.00	\$ 13,000.00		
Environmental Impact Statements (low-medium complexity)	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00		
Environmental Impact Statements (high complexity)	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00		

*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

A Proposal for the
North Carolina Department of Commerce

Community Development
Block Grant-Disaster
Recovery (CDBG-DR)
Expert Administration
Support

1. TITLE PAGE

Proposal in Response to RFP #Doc1677946894

Community Development Block Grant-Disaster Recovery (CDBG-DR) Expert Administration Support

Submitted to:

Angie Dunaway
DCR Procurement Director
North Carolina Department of Commerce
301 North Wilmington Street
Raleigh, NC 27601

Prime Vendor:

Witt O'Brien's, LLC
818 Town & Country Blvd.
Suite 200, Houston, TX 77024
(281) 320-9796 | www.wittobriens.com

Contact for Proposal Correspondence:

If you have any questions about our proposal or require additional information about our services or the firm, please contact our Project Executive, Vanessa Brower, at vbrower@wittobriens.com or our Project Manager, Zabrina Minor-Gregg, at zminorgregg@wittobriens.com, with a copy to Cheryl Joiner, Director of Contract Compliance (Authorized Representative), at contractrequests@wittobriens.com.

Submittal Deadline:

September 11, 2025

Our firm and its key personnel have no actual or potential conflicts of interest related to this solicitation.

Witt O'Brien's reserves the right to negotiate terms and conditions applicable to any final agreement and, if selected, will negotiate in good faith with the North Carolina Department of Commerce to enter into a mutually agreeable formal written agreement.



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-

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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

	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.

Addendum 1_Staff Augmentation

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

Addendum 1_Staff Augmentation

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

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.

Addendum 1_Staff Augmentation

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

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

Addendum 1_Staff Augmentation

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

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

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

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

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

		only with task orders, not with this response.	
125	Ariba Sourcing Event, Section 5.1	Please confirm that the upload required in this section should include a complete, signed, and initialed copy of the Solicitation Document, and our unredacted offer, in a single PDF file. (If not, please clarify the intended content to upload.)	eProcurement Sourcing, Section 5.1 VENDOR OFFER , is where to upload the complete and <u>signed UNREDACTED</u> offer. The <u>entire offer</u> should be one (1) pdf file. eProcurement Sourcing, Section 5.3 VENDOR OFFER (REDACTED) , is where to upload the REDACTED offer.
126	Ariba Sourcing Event, Section 5.2	This section requests that bidders upload a completed Attachment A, Pricing, in Excel format. However, Attachment A is provided only in PDF format, not in Excel. Is there an Excel version of Attachment A that DCR will provide? Or are bidders expected to replicate the entire content of Attachment A in Excel before completing it and uploading it? Or is Excel only for the pricing table, and the rest of Attachment A should be completed in PDF format? If the latter, are bidders able to upload more than one file in Section 5.2?	eProcurement Sourcing, Section 5.2 ATTACHMENT A: PRICING is where to upload <u>pricing in 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.

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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.

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		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.

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	Standard Operating Procedures (SOPs) Page 19	Operating Procedures (SOPs)" envisioned as something that would be done for each Action Plan program or for more general CDBG-DR grant management needs?	
151	5.2.13 Task 13 – Relocation Program (URA/TRA) Development and Compliance Support Page 22-23	Is the service of assisting with "Relocation Program Development and Compliance Support" envisioned as something that would be done as a separate program and contract from current contracts with vendors operating the Renew NC Reconstruction and Rehabilitation for Owner-Occupied Units Program?	The service of assisting with "Relocation Program Development and Compliance Support" is envisioned as something that would support URA compliance within housing, infrastructure, and/or economic revitalization programs, as required.
152	5.2.14 Task 14 – Communication, Public Information, and Outreach Support Page 23	Is the service of assisting with "Communication, Public Information, and Outreach Support" envisioned as something that would be done for each Action Plan program or specific ones?	The service of assisting with "Communication, Public Information, and Outreach Support" is envisioned as being available for all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.
153	5.2.16 Task 16 – Technical Systems Specification & Project Management Page 23	Is the service of assisting with "Technical Systems Specification & Project Management" envisioned as something that would be done as an overarching service across all Action Plan programs or specific ones?	The service of assisting with "Technical Systems Specification & Project Management" is envisioned as an overarching service available across all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.
154	5.2.5 Task 5 – Claims, Appeals, and Case Reviews Page 20	Is the service of assisting with "Claims, Appeals, and Case Reviews" envisioned as something that would be done for each Action Plan program or specific ones?	The service of assisting with "Claims, Appeals, and Case Reviews" is envisioned as being available for all Action Plan programs. Specific scope, level of effort, and deliverables will be defined at the task order level based on the needs of each program.

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

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		and/or Phase II ESAs, wetlands delineation, etc.) to produce a compliant ER. Costs for these additional assessments may exceed the typical unit cost by a factor of 10 or more. How do we account for these potential differences in costs for the purpose of submitting unit costs?	
163	5.2 TASKS / DELIVERABLES Task 9 (section 5.2.9) Page 21	<p>The section requests technical assistance "including but not limited to civil rights, fair housing, labor standards, and historic preservation."</p> <p>It appears as if the intention of the RFP is for firms to propose on a full task; however, there are firms that specialize in historic preservation and Section 106 consultation without any expertise in items like fair housing and labor standards.</p> <p>Would it be permissible for a firm to propose on a subset of services within a Task? Specifically for Task 9, can a firm provide qualifications for work involving Section 106 consultation and other historic resources services but not the other scope items within Task 9?</p>	The vendor or its team should be able to respond to all tasks and deliverables within task 9. DCR may or may not issue task orders for all of these activities.
164	4.11 FINANCIAL INFORMATION Page 17	Can submit financial statements directly instead of including in the response, o avoid any unintentional disclosure given the highly confidential nature of the information?	No, all documents that are part of the proposal should be submitted in one pdf file in the sourcing tool, as described in the RFP. A redacted version should be submitted separately.
165	5.1 General Page 18	Does the State have an estimate of how many staff will be activated for this contract?	See response to Question #88. This information is not known. Per RFP Section 5.1 GENERAL, <i>"The specific level of Vendor support for each task order is not yet known and will depend on evolving program needs."</i>

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

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

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

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		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

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		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.

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

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		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: Witt O'Brien's, LLC

AUTHORIZED SIGNATURE: [REDACTED]

NAME and TITLE (Print or Typed): Cheryl Joiner, Director of Contracts and Compliance

DATE: 09/09/2025

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4. NARRATIVE RESPONSE: VENDOR QUALIFICATIONS AND APPROACH

Witt O'Brien's is a firm focused on policy advisory services and the entire lifecycle of grants management to *improve the resilience of communities nationwide*. Our firm was formed in 2009 through the merger of O'Brien's Response Management (founded in 1983) and Witt Associates (founded in 2001), and is a wholly owned subsidiary of Ambipar Holding USA, Inc. For more than 20 years, Witt O'Brien's and its legacy entities have supported grants pursuance and grants management efforts across the country. During this time, we have maximized the recovery and implementation of *over \$75 billion in Federal funding* across the spectrum of available sources — including FEMA, HUD, US Treasury, US DOT, HHS, DOT, and EPA.

4.1 EXPERIENCE IN FEDERAL FUNDED GRANTS MANAGEMENT

Our strength is in our ability to implement Federal grants programs for disaster recovery, resilience, and mitigation. As shown in **Exhibit 1**, we offer a comprehensive suite of services, ranging from developing funding strategies and grant applications to post-award management and closeout.

We assist our clients in managing comprehensive grants funding programs that utilize the full range of funding sources not only for the benefit of the community's needs, but also to develop targeted strategies that will build community resilience and positively impact future generations. Specifically, we help clients rethink and redesign their approach to grants pursuance to create a more centralized, transparent, successful, and sustainable process. Our understanding of compliance requirements throughout each phase of the lifecycle translates to a smoother and more efficient execution of projects, minimizing risk and ensuring regulatory alignment from start to finish.

In the past five (5) years, we have supported over 250 clients with the management of grant programs (See **Exhibit 2**).

Exhibit 1: Witt O'Brien's Offers End-to-End Grants Management Advisory Services

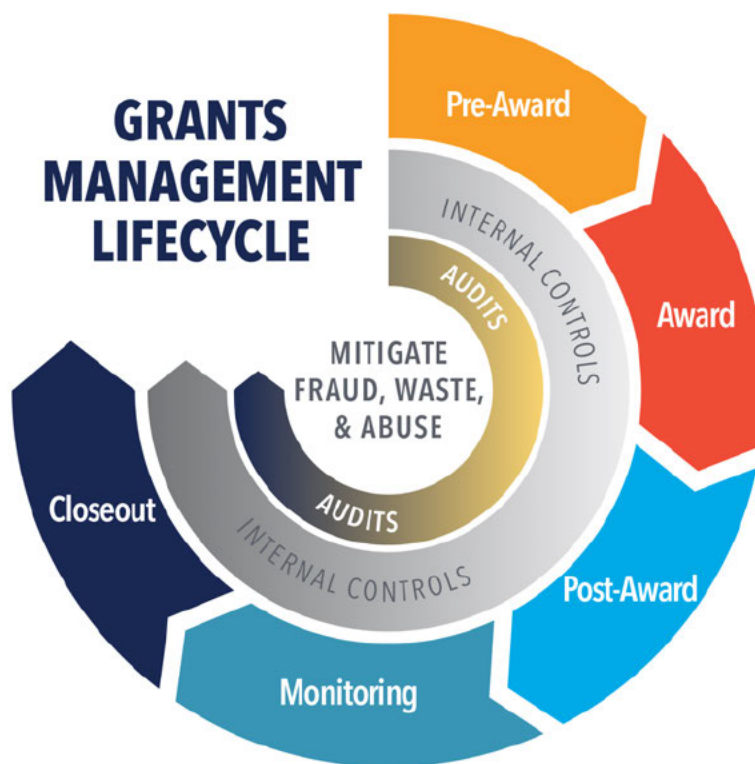


Exhibit 2: Snapshot of Our Grants Clients Across the Nation



Maximizing Funding Opportunities

To date, we have maximized the recovery and implementation of over \$75 billion in Federal funding across the spectrum of available sources including not only the legacy FEMA and HUD recovery programs, but also the Coronavirus Aid, Relief, and Economic Security (CARES) Act; American Rescue Plan Act (ARPA); Infrastructure Investment and Jobs Act/Bipartisan Infrastructure Law (IIJA/BIL); and Inflation Reduction Act (IRA).

To elevate funding opportunities, we strive to **braid funds** with other sources—including state, regional, philanthropic, and private organizations. Since projects often rely on single-source funding, we look for opportunities to layer (i.e., braid) multiple funding sources to optimize and amplify their impact. We bring the necessary comprehensive understanding of each program's specific programmatic requirements to ensure compliance and no Duplication of Benefits (DOBs).

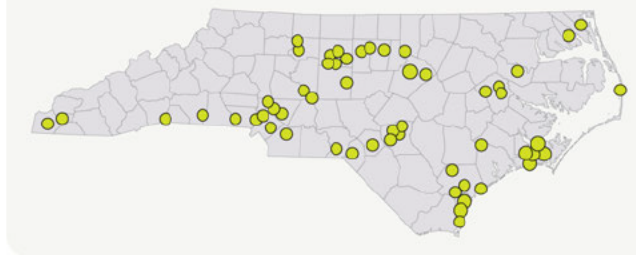


Experience in North Carolina

Our services span all levels of government and types of organizations across the country – this includes our current support for the NC Department of Commerce, Division of Workforce Solutions, in which we are providing grant writing, technical assistance, and post-award grants management services.

As part of our disaster recovery and grants management services, we have supported more than 55 communities and organizations in North Carolina. Starting with Hurricane Isabel in 2003, we assisted with grant management, FEMA PA, and hazard mitigation services, as well as emergency response and disaster preparedness planning. Highlights of our experience supporting communities throughout North Carolina are below:

Our North Carolina Experience



North Carolina League of Municipalities (NCLM) Grants Technical Assistance

Since 2022, we have been assisting dozens of municipalities throughout the State through a partnership with the NCLM. We initially started with grants research, writing, and braided funding guidance to maximize Federal grants programs under ARPA, IIJA/BIL, and the IRA. Our support evolved to include providing organizational assessments and capacity building, increasing the municipalities' ability to maximize grant funding awards.

Following this, NCLM offered municipalities an opportunity to use up to \$30,000 for our team's support in grant identification, writing, and management. Over the past two years, 59 municipalities have entered into member agreements to use the NCLM funds for our team's support. We have provided them with tailored one-on-one technical assistance to develop and submit grant applications that result in funding awards. We have conducted outreach with an additional 88 municipalities to discuss their potential needs and interest in our services. Also, the towns of Hope Mills and Pembroke have independently contracted with our firm for additional ongoing grants pursuance and management support.

To date, our team of grant writers has developed and submitted more than 57 separate Federal, state, and foundation grant applications, exceeding \$35 million in funding for 35 of these municipalities. Funding sources include:

- NC Rural Downtown Economic Development (RDED) Grants
- NC DOT Governors Highway Safety Program (GHSP)
- NC Parks and Recreation Trust Fund (PARTF) and Great Trails State Program (GTSP)
- FEMA Building Resistant Infrastructure and Communities (BRIC), Staffing for Adequate Fire and Emergency Response (SAFER), and Assistance to Firefighter Grants (AFG);
- DOT Safe Streets for All (SS4A) and Active Transportation Infrastructure Investment Program (ATIIP); and
- DOJ COPS Hiring Program (CHP), COPS Safer Outcomes, and Patrick Leahy Bulletproof Vest Partnership (BVP).

Additional funding sources include other Federal, state, and foundation-level grants.

North Carolina Dept of Commerce, Division of Workforce Solutions

We have a contract with the NC Department of Commerce (DOC), Division of Workforce Solutions (DWS), to provide grant writing, technical assistance, and post-award grant management services to maximize their federal grant opportunities and strengthen post-award management capacity.

Key Results to Date:

- Produced two competitive federal grant applications, securing \$4 million (Pathway Home Round 6) in new workforce funding for reentry services.
- Delivered a state-wide communications plan to guide workforce grant outreach and engagement.
- Identified new grant opportunities aligned with NC's strategic workforce priorities.
- Provided decision support that enabled the State to avoid pursuing a high-risk, under-resourced application (20-day turnaround).
- Supported the DWS Data Team in completing and submitting the Workforce Data Quality Initiative.

Currently, Witt O'Brien's is developing the narrative, budget narrative, and supporting materials for the Industry-Driven Skills Training Fund demonstration grant, valued at \$8 million, which will be submitted in September 2025.

Town of Morehead City, CDBG-DR Support Services

We are currently providing the Town with grant management and administration services for its \$8.3 million CDBG-DR grant, which is supporting the construction of a 168-unit affordable multi-family housing development. This project is described in more detail in the next section of our proposal.

Preparedness and Recovery Support for the UNC System

In 2019, we were contracted to conduct a comprehensive assessment of the system's capabilities and capacity for preparedness, response, and recovery from natural or human-caused emergencies and disasters. Of particular concern were the impacts from and response to 2018's Hurricane Florence, which directly affected UNC's Wilmington, Pembroke, and Fayetteville State campuses, and indirectly impacted the entire system through the activation of memoranda of understanding and mutual assistance. After the onset of the pandemic in 2020, we were asked to support the System Office and its affiliated organizations, as well as the 17 member campuses, in navigating the complexities of COVID-19 and all the Federal funding streams made available to them. This support included coordinating the program eligibility and available funding from FEMA PA, the Higher Education Emergency Relief Funding from the U.S. Department of Education, and the Coronavirus Relief Fund (CRF) allocation from the State of NC as distributed by the U.S. Treasury. Additionally, we supported ongoing cost reimbursement of vaccination efforts directly from the NC Dept. of Public Safety. These efforts have resulted in the recovery of just over \$400k in Vaccine Support costs from the State of NC's FEMA Vaccine Support allocation and almost \$13 million in direct FEMA PA reimbursement.

4.1.1 EXPERIENCE IN HUD-FUNDED GRANTS MANAGEMENT

CDBG-DR supports local communities recovering from disaster events by assisting in various ways, including economic revitalization, infrastructure recovery, and housing services. Our approach involves collaborating with our clients, as they are responsible for overseeing and implementing this funding. Where appropriate, we will review and reassess the County's unmet needs and standardize the DOBs and verification of benefits (VOBs) review process when leveraging the use of additional HUD programs

(CDBG-MIT, etc.) and other Federal funding sources (such as FEMA, FHWA, etc.) to augment these funds.

Exhibit 3: CDBG and Related Program Experience

Witt O'Brien's brings extensive experience across the Disaster, HUD/Housing, Infrastructure, and Community Development Landscape



- ◆ CDBG, CDBG-DR & CDBG-MIT
- ◆ CDBG-DR Action Plans
- ◆ Acquisition, Demolition and Rehabilitation Programs
- ◆ Land Acquisition-Including Land Banks and other Mechanisms
- ◆ Historic Preservation
- ◆ Low-Income Housing Tax Credit (LIHTC)
- ◆ HOME
- ◆ FEMA
- ◆ Single-Family and Multi-Family program development and compliance
- ◆ Continuum of Care Funding Housing and Homelessness Initiatives
- ◆ Public Housing Authorities
- ◆ CDFIs (Community Development Financial Institutions)
- ◆ Mortgage Lenders
- ◆ Mortgage Products
- ◆ Permanent Supportive Housing
- ◆ Historic Preservation
- ◆ Land Use
- ◆ Economic Development
- ◆ Water Resource Projects
- ◆ Energy Infrastructure
- ◆ Transportation Infrastructure
- ◆ Community Planning and Development

Our staff boasts decades of experience in HUD programs, including HOME, CDBG-DR, CDBG-MIT, Emergency Solutions Grants (ESG), and CDBG Entitlement Funding. Our experts excel in developing, implementing, and managing HUD funding, which is designed to address unmet needs, support national objectives, and benefit members of the community, particularly Low- to Moderate-Income (LMI) households, most impacted and distressed (MID) areas, and others. To date, we have supported clients with the administration of **over \$3 billion in CDBG funds** in support of economic development, infrastructure enhancement, housing rehabilitation, and community services.

We will collaborate with you to ensure that all programs and projects are completed in compliance with HUD's Universal Notice; 24 CFR Part 200 (Uniform Guidance); 24 CFR 58; 24 CFR 570, and all applicable Federal, state, and local regulations. Additionally, we stay current with HUD notices, waivers, and alternative requirements, including the recently published Universal Notice, which aims to outline a comprehensive and uniform set of waivers and alternative requirements.

Our goal is to maximize your recovery dollars and ensure the resilience of your community. Our specific capabilities include:

- **Action Plans.** Our staff brings decades of experience as practitioners of CDBG-DR programs, including developing, writing, supporting, and implementing Action Plans for CDBG-DR, CDBG-MIT, and CDBG Entitlement Funding—with minimal edits and comments from HUD. These Action Plans were and are crucial to the recipient's implementation of HUD funding, which is needed for human services, housing, economic revitalization, and infrastructure projects and programs
- **HUD program design and implementation.** We are skilled in developing, implementing, and managing HUD funding for human services, housing, economic revitalization, and infrastructure

projects. These projects address unmet needs, support national objectives, and benefit communities, including LMI households, distressed areas, and others.

- **CDBG-DR disaster recovery.** We also have experience in identifying, designing, and executing CDBG-DR recovery projects. The needs we address through CDBG-DR funds include housing, infrastructure, economic revitalization, public services, and mitigation. Our team of Federal policy and program experts is well-versed in CDBG-DR program laws, regulations, compliance, management, and full-scale recovery efforts.
- **Long-term recovery and resilience.** We actively coordinate assistance and projects with resiliency and long-term recovery plans. We raise awareness of disaster recovery assistance and outcomes, and work to improve community resilience, particularly for LMI households.

While examples of our past performance are contained throughout our response, we highlight examples of our most relevant work below.

Town of Morehead City, NC: CDBG-DR Program Management and Administration

We are currently providing the Town with grant management and administration services for its \$8.3 million CDBG-DR grant, which is supporting the construction of a 168-unit affordable multi-family housing development. Our support spans the project from pre-development through final reporting and HUD closeout, and includes:

- Assisting the Town in ensuring compliance with Section 3 and Davis-Bacon requirements in conformance with the HUD-approved State of North Carolina Hurricane Florence CDBG-DR Action Plan and subrecipient agreement between NCORR and the Town.
- To ensure maximum funding opportunities, developed a braided funding strategy of CDBG-DR, low-income housing tax credits, a HUD 221(d)(4) loan, and bond financing.
- Provided training in HUD and related acts to build the capability and capacity of the Town's staff.

St. Charles County, MO: CDBG-DR Local Voluntary Buyout Program

Since 2023, we have provided grant management services to the County's Department of Community Development, enabling them to operate their \$15 million Buyout Program in accordance with the State's Action Plan and HUD requirements. The program is designed to meet the low-to-moderate-income benefit and the low-to-moderate-income housing (LMH) National Objective, in large part by purchasing 100 properties. Our support has included:

- Supported the program design and mobilization/launch, providing outreach and case management services
- Evaluated the policy and procedures and formulated alternative requirements, which were reviewed by both the State and HUD and accepted for implementation.
- Supported environmental review, eligibility assessment, DOBs review, acquisition, abatement, demolition, and transferring the land to perpetual open-space management.

US Virgin Islands: CDBG-DR Action Plan and Program Management

For eight years, our firm has been providing comprehensive disaster recovery support for the USVI following Hurricanes Irma and Maria. We have provided program management of the island's \$21+ billion in recovery across multiple funding programs. In support of their CDBG-DR program specifically, our accomplishments include:

- Developed the Action Plan to secure a record-breaking \$1.8 billion in CDBG-DR funding for recovery projects—this allocation represents the highest per-capita funding in the history of CDBG-DR funding for the Territory and the nation.
- With part of that funding, designed, implemented, and provided oversight for key programs that support rehabilitation and reconstruction for homeowners and renters while also making funding available for new construction of affordable and subsidized housing.
- Assisted the USVI in successfully combining grant funding from CDBG-DR, CDBG-MIT, and 404 Hazard Mitigation Grant Program (HMGP) to fund the construction of a multi-purpose complex with saferoom capabilities.
- Developed multiple waiver requests for submission to HUD and drafted projections, general administration, and program policies, procedures, workflows, applications, agreements, and solicitations.
- Successfully lobbied HUD to revise and increase its funding allocation for the USVI by \$250 million in recognition of the higher costs of construction on the Islands.

Puerto Rico Electric Power Authority (PREPA): Disaster Recovery Services

We provide professional technical advisory and consulting services to assist PREPA in developing recovery projects following Hurricane Maria. Our support focuses on disaster recovery project formulation for project funding under FEMA PA (including Section 406 and Section 428), FEMA HMGP, and HUD CDBG-DR and CDBG-MIT. We worked with PREPA leadership, COR3 (the state funding recipient), and FEMA staff to develop a targeted list of projects for funding submission. To date, we have assisted PREPA in securing over \$3.6 billion, including \$533 million in CDBG-DR funding.

University of Texas Medical Branch: Disaster Recovery Services

Following Hurricane Ike in October 2008, the University of Texas System contracted us to assist UTMB in developing, documenting, managing, and submitting grant applications for funds available in FEMA's disaster programs. Our support included:

- Provided application and grants management support for HMGP, BRIC, PDM, and CDBG-MIT funding—secured \$14 million in CDBG-MIT funding and developed applications for more than \$75 million in Hazard Mitigation Assistance (HMA) funding.
- Provided grants management services for HUD CDBG-MIT funding, completing required reporting, ensuring compliance with Section 3, and processing requests for reimbursement—ultimately ensuring the project was completed on time and maintaining compliance with all grant requirements.

Eastern Municipal Water District (EMWD), CA: Grants Management Services

We are currently providing technical assistance in managing the District's various grant programs. This work includes:

- Drafting construction specifications for funding sources
- Providing Davis-Bacon and Related Acts compliance and monitoring support for the construction of various infrastructure projects—including technical assistance and training, material development, review of contractor (and subcontractor) payroll reports, and on-site wage interviews.
- Analyzing the key procurement requirements in various Federal, state, and local funding opportunities. The team developed decision matrices related to funding thresholds that prompt

different levels of procurement requirements, enabling EMWD's grants, procurement, and contract departments to ensure compliance.

- Providing training to District staff, as well as their contractors and subcontractors, related to Davis-Bacon and Related Acts.

4.1.2 EXPERIENCE IN OTHER FEDERAL HOUSING FINANCING

In addition to our specific support for CDBG-DR and other HUD-related programs, we also bring the experience in housing-related grant program management through ARPA Programs. During and after the COVID-19 pandemic, our firm assisted hundreds of communities and organizations nationwide in managing the new sources of grant funding under ARPA that have an impact on housing. These included:

- Coronavirus State and Local Fiscal Recovery Funds (SLFRF), which could be used for community development as well as emergency relief and transportation infrastructure
- Emergency Rental Assistance (ERA) Program, which provided rent relief funding to landlords and utility companies with impacted tenants
- Homeowners Assistance Fund (HAF), which helped homeowners obtain relief for property and mortgage delinquencies.
- Low-Income Housing Tax Credit (LIHTC)
- HMA Program Experience

Within just a few years, we helped organizations across the country manage *more than \$10 billion* in funds from these programs—detailed examples of projects where SLFRF, ERA, and HAF were leveraged for housing-related opportunities.

Jefferson County, Alabama

In 2020, Jefferson County enlisted Witt O'Brien's to manage multiple COVID-19 Federal grants programs, including FEMA PA, the CRF, ARPA/SLFRF, and ERA. For the \$128 million SLFRF funding in particular, our team has provided end-to-end Federal grants management support, including program and project design of subrecipient programs involving more than 60 local organizations. Major projects addressed by the funding that impacted housing included:

- **Affordable housing rehabilitation** – The County allocated \$3 million to renovate, repair, and remediate affordable housing and provide services for housing security. This program, which was aligned with CDBG, assisted nearly 70 households, the majority of which were occupied by senior citizens.
- **Affordable homeownership development** – The County also allocated \$3 million to develop and expand affordable homeownership, in partnership with the Greater Birmingham Habitat for Humanity. The program provided for the construction of 30 new homes in the County
- **Non-profit assistance** – The County provided awards to non-profit organizations impacted by the pandemic, addressing those that provided services in housing, homelessness, senior services, childcare, economic development, and historic preservation.
- **Emergency Rent Assistance Affordable Housing Set Aside**– The County elected to use ~15.5M for allowable affordable housing programs. This project ensured the development of 104 units of elderly rental housing. Additionally, using complex program compliance recommendations

from the Witt O'Brien's team and obtaining Treasury approval, they were able to utilize program income and reuse the funds for a 60-unit project of new construction.

For these programs, our team has been providing capacity building and technical assistance to the subrecipient organizations, resulting in improved award performance and reduced risk to the County.

Alabama Association of Habitat Affiliates (AAHA)

In July of 2023, the State of Alabama allocated \$15 million of its ARPA/SLFRF funding to support AAHA's mission of providing opportunities for long-term housing security to disproportionately affected populations in the form of home building, home repair, and downpayment assistance options.

We are currently contracted to provide end-to-end Federal grants management support for Alabama Habitat for Humanity and its 19 affiliate subrecipients. The scope of services provided includes program design and implementation, procurement, subrecipient management, financial review and reporting, subrecipient monitoring and compliance, and closeout and audit documentation. As of August 2025, we have supported 133 unique housing construction and down payment assistance projects and 242 unique home repair projects completed by Alabama Habitat for Humanity's affiliates.

Our team provided technical assistance with 2 CFR 200-compliant procurement for construction projects and subrecipient management. We provided templates for all types of ARPA/SLFRF engagements, including financial and reporting reviews (such as technical invoice reviews), as well as monitoring to ensure compliance for all awardees. These instruments also assisted with fraud prevention measures.

In addition, we provide extensive support to State-level agencies responsible for the overall program administration of their ERA and HAF programs, as follows:

California Department of Housing Community Development (HCD)

We are collaborating with the California HCD to conduct a compliance assessment of their \$ 1 billion+ ERA Programs (ERA1 and ERA2) for fiscal year 2021. The assessment covers 2 CFR 200 200.331-333 Subrecipient Monitoring, including program compliance and policy conformance for 37 local governments across the state.

Delaware State Housing Authority (DSHA)

For over three years, we have supported DSHA in implementing the HAF and ERA programs. For HAF, we designed, developed, and implemented the program, overseeing administration of \$50 million in grants to provide financial assistance to households experiencing a COVID-19-related financial hardship. For ERAP, we assisted with case backlog by conducting eligibility reviews and communicating directly with tenants and landlords regarding application needs and requirements.

Iowa Finance Authority (IFA)

We assisted Iowa in implementing both the ERA and HAF funding programs. For the ERA program, we established a call center to handle questions from applicants and a team to review applications, identify outstanding documents, and follow up with tenants or landlords as needed. We also provided program design, compliance assistance, and IT platform support for the State's \$40 million HAF program.

Kansas Housing Resource Corporation (KHRC)

We provided KHRC with turnkey services, including continuing program consulting, policy/process advising, application processing, data reporting, and maintaining a full-time program call center for

their ERA Program. Our team assisted KHRC in processing over 60,000 applications and providing nearly \$300 million in emergency rental and utility assistance to more than 80,000 at-risk Kansas residents. We also assisted KHRC in administering over \$55 million in HAF funding, providing housing counseling, mortgage and ownership relief, mortgage reinstatement/principal reduction, homeownership assistance, and down payment assistance.

Minnesota Housing Finance Authority (MHFA)

We provided end-to-end management, application, and payment processing services for Minnesota's \$477 million RentHelpMN ERA Program. The project's scope encompasses the development of program policies and procedures, the establishment of eligibility criteria, application processing, quality assurance, payment processing, appeals, fraud detection, and recoupment.

Rhode Island Housing.

We assisted the State in disbursing more than \$270 million in ERA program funds for its RentRelief program. We provided case management and call center support, delivering a comprehensive suite of tools that included technology, training, and a web-based application portal.

Texas Department of Housing and Community Affairs (TDHCA)

We helped TDHCA meet its aggressive timeline to administer \$1.3 billion in rent relief funding to 230,000 impacted households. Within just a few months, our team completed 45,000 applications, processed 350,000 payments, and disbursed \$800.5 million.

US Virgin Islands Housing Finance Authority (VIHFA)

By incentivizing private developers to build and manage affordable housing through the sale of LIHTC to investors. Typically, CDBG funds cannot be used for new construction, but waivers are often issued when CDBG-Disaster Recovery (CDBG-DR) funding is allocated by Congress. Developers secure construction and/or permanent loans, gap financing, and equity from private investors in exchange for LIHTCs. CDBG-DR funds meet capital shortfalls and expedite the pace of qualified, new construction and/or rehabilitation projects.

Town of Morehead City, NC

Provided cross-cutting requirements assistance, of braided funding with CDBG-DR for City's Elijah's Landing project—a 168-unit affordable housing property—leveraging CDBG-DR, LIHTC, HUD 221(4)d, and bond financing.

HMA Program Experience

Our team has the experience to navigate the complexities of the HMGP Match Buyout Program, ensuring compliance with FEMA and CDBG-DR regulations, as well as the URA (49 CFR 24.103). We have over 15 years of experience with FEMA's hazard mitigation programs, including HMGP, HMGP-PF, legacy and legislative PDM, BRIC, and FMA. We will leverage our understanding of hazards, local requirements, FEMA-All Regions, and structural mechanisms to provide cost savings and maximize benefits while ensuring a customized product tailored to your needs. Examples Include:

US. Virgin Islands

Since 2017, Witt O'Brien's has led recovery efforts in the USVI from Hurricanes Irma and Maria. This has included working with the Territorial Emergency Management Agency (VITEMA) to develop a \$4.9

million comprehensive mitigation plan—one of the largest mitigation plans approved by FEMA in the last 20 years.

Our team collaborated with VITEMA to implement all aspects of the Section 404 HMGP for Hurricanes Irma and Maria—including agency outreach, applicant briefings, the notice of interest process, development of grant applications, post-award kick-off meetings, and support, as needed, through the project implementation phase. Our team has developed more than 160 HMGP applications, totaling over \$1.3 billion with a more than 95 percent application final acceptance rate. We also completed Benefit-Cost Analyses (BCAs) for all these applications. The application period ended in October 2022. Witt O'Brien's continues to support VITEMA with amendments, phased deliverable reviews, and overall program delivery technical assistance.

Key HMGP projects approved to date include \$7.3 million for code enforcement, funding for the retrofit of multiple fire stations, back-up communication equipment for key agencies, innovative solutions for emergency back-up power, wind retrofits of public buildings, and various safe rooms throughout the Territory. The Witt O'Brien's team supports application development, including BCAs for an HMGP ceiling lock-in of ~\$1.2 billion.

University of Texas Medical Branch (UTMB)

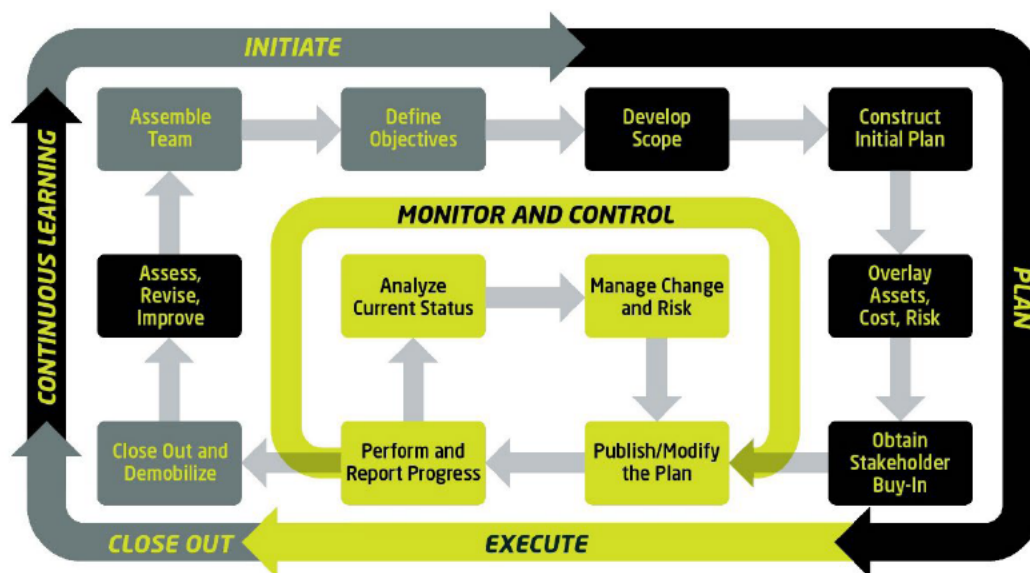
Witt O'Brien's has worked closely with the university after Category 2 Hurricane Ike (2008) caused widespread damage to Galveston Island and UTMB. For the last 16 years, we have provided application and grants management support for the HMGP, BRIC, PDM, and CDBG-MIT funding programs. We also developed UTMB's inaugural HMP in less than six weeks as the University had hazard mitigation project applications pending with the Texas Department of Emergency Management. We also provided disaster recovery management services to include FEMA PA Section 406. In summary, and **to date, our efforts have resulted in UTMB receiving more than \$75 million in HMA funding, \$14 million in BRIC and CDBG-MIT funding, and \$520 million in PA funding, including over \$90 million in PA 406 mitigation funding.**

4.2 TECHNICAL APPROACH TO TASK ORDERS

4.2.1 APPROACH TO TASK ORDERS

Our approach to task order management begins with our project management approach, which is consistent with the Project Management Institute's (PMI) "A Guide to the Project Management Body of Knowledge (PMBOK)" and the PMI Practice Guides. As such, it includes the five PMI project phases: 1) initiate, 2) plan, 3) execute, 4) monitor and control, and 5) closeout. An overview of our standard project management process is shown in **Exhibit 4**.

Exhibit 4: Witt O'Brien's Project Management Process



We recognize that your needs may vary during the period of performance of this contract, both in terms of the size of effort and specific functional disciplines (or skillsets) required. Although our project management approach is aligned with the PMI, it is consistently implemented in a manner that is ***tailored to each client and the project's environment***—its size, dollar value, level of risk, and complexity. Tailoring is the deliberate adaptation and adjustment of our process-driven management approach and governance to best manage the project, given its characteristics, the work being performed, and the culture of your organization.

Since this is a task order (TO) contract, we will ***tailor the implementation of our project management processes according to the nature of the work and the needs of the TOs you issue***. Although TOs will be governed by the requirements of the master contract (as appropriate), we will consider each TO as a separate project. Our team will adapt our project management lifecycle phase approach as follows:

Task Order Development

Upon award of a TO, we will initiate and plan the project. Our Project Manager will appoint a qualified senior staff member to serve as the TO Manager for each specific task order assigned. ***We implement the "best athlete" approach***, drawing from our skilled and qualified team to identify the right person to lead and the right individuals to support the effort. All team members agree to function together as a single unit, with senior staff each bringing the ability to lead, manage, and access resources from across the team. Under the Project Manager's direction, each TO Manager will serve as the primary point of contact for their TO, responsible for overall, day-to-day contract management, including ongoing client communications, oversight of subcontractors, and ensuring the quality of projects and deliverables.

As soon as feasible, the Project Manager and the TO Manager will schedule a kick-off meeting with your designated project manager to discuss the goals of the TO and the proposed schedule, deliverables, and staffing. Following the kick-off, the Project Manager and the TO Manager will develop a preliminary Task Order Management Plan (TOMP) to serve as the roadmap for execution. The TOMP

will establish the work scope, activities, deliverables, schedule, key milestones, the staffing plan, and a cost performance baseline. These baselines provide the basis for monitoring, controlling, and reporting on the work, including the comparison of planned vs. actual schedule and costs, work accomplishment, and product delivery.

They will submit the draft TOMP for your review and approval. At that point, the TOMP will be a living document that is revised and updated as needed throughout the task implementation to reflect any changes in schedule, activities, staffing, and other relevant factors.

Task Order Management

Effective TO management requires adequate staffing and management processes, as well as tools to ensure management of costs, schedule, work scope, and quality. In coordination with the TO Manager, the Project Manager will utilize the TOMP to monitor task execution, including activities, milestones, deliverables, and issues/risks, as well as track and resolve those issues. During this process, our team will modify the TOMP as necessary.

Consistent with the PMI framework described above, management of the TO will consist of the following major phases:

- **Execute** – In the Execute Phase, we perform the work described in the TOMP by coordinating resources, engaging stakeholders, integrating, and performing the activities of the project defined in the TOMP.
- **Monitor & Control** – concurrent with Execute, we continuously monitor real-time project performance indicators (e.g., work scope accomplishment, schedule, cost, and quality) against the performance baseline in the TOMP. As we identify any variances to the baseline, we will determine the root-cause and take corrective actions as necessary to bring performance back in line with the TOMP. We will also regularly report on established performance metrics to all stakeholders, as outlined in the communications plan. This phase includes monthly progress meetings and reporting, as well as any identified risks (e.g., delivery, staffing, scope creep, timeline, or budget) and plans to mitigate them.
- **Closeout** – Finally, as the TO comes to an end, we will use our closeout process and checklist to ensure all TOMP requirements are accounted for and that all deliverables have been received and accepted. We will closeout accounts and ensure that warranties and maintenance certificates are in place.

4.2.2 STAFFING PLAN AND ASSIGNMENT

The Witt O'Brien's project team has been purpose-built based on their qualifications and successful execution and delivery of CDBG-DR projects nationwide. The qualifications of the proposed project team are provided in Section 4.2.3 with resumes of key personnel listed in Section 5 below.

We maintain a staff of over 300 subject matter experts (SMEs), which includes specialists in CDBG-DR, housing, grants, compliance, labor compliance, finance, fraud, engineering, infrastructure, and environmental services, to support the contract as needed. The pre-qualified list of staff identified below includes key and support personnel for any resulting task order under this contract.

To ensure that staffing needs can be met under any task order under this contract, we maintain a Resource Utilization Tool (RUT) to staff projects with resources who possess the proper skill set, experience, and availability. The RUT enables the project manager to forecast staffing levels across all

active projects throughout the contract period, aligning them with project budgets. It provides transparency into real-time and anticipated workload capacities and staff availability, as well as schedule adherence against predetermined milestones and alignment with project budgets.

Our team is well-positioned to support all tasks outlined in this RFP. In **Exhibit 5** below, we have grouped the tasks according to the functions they encompass. Our team of experts is ready to support the DCR with the complete execution of its action plan. We are familiar with North Carolina and have established deep relationships with numerous groups that will help his work.

Exhibit 5: Integration of Tasks against Scope Delivery

	Compliance, Oversight, and Governance	Task 1 Development of Policies, Procedures, and 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 15 Grant Management
	Program Performance, Monitoring, and Accountability	Task 7 Needs Assessments, Market Analysis, and Geospatial Support Task 8 Program Performance Monitoring and Evaluation Task 10 Audit Readiness and Monitoring Support
	Technical Subject Matter Expertise Support	Task 9 Civil Rights, Fair Housing, Labor Standards, and Historic Preservation Task 11 Technical and Engineering Support for Infrastructure and Housing Projects Task 13 Relocation Program (URA/TRA) Development and Compliance Support Task 16 Technical Systems Specification & Project Management (Software Implementation) Task 17 Environmental Review
	Capacity Building, Technical Assistance, Outreach, and Communication	Task 12 Training, Technical Assistance, and Capacity Building Task 14 Communication, Public Information, and Outreach Support

Vanessa Brower and Zabrina Minor-Gregg are well-positioned to guide the Division of Community Revitalization through the implementation of North Carolina's \$1.4 billion Hurricane Helene Action Plan. Together, they bring the balance of strategic leadership and practical execution needed to deliver results across housing, infrastructure, mitigation, and economic revitalization priorities.

The Leadership team's project management approach emphasizes transparent governance, disciplined scheduling, and proactive risk management. We structure work around HUD's compliance requirements while using proven systems for tracking deliverables, monitoring performance, and coordinating across

stakeholders. Vanessa Brower is named as the Project Principal, and Zabrina Minor-Gregg as the Project Manager. Vanessa provides high-level oversight and ensures alignment with regulatory frameworks. Zabrina leads day-to-day program management, focusing on communication, transparency, and accountability. This dual leadership model ensures that every task order—whether it involves housing rehabilitation, infrastructure investment, or economic revitalization—will be managed with both strategic vision and operational precision, producing measurable and compliant outcomes for the impacted North Carolina communities.

Vanessa Brower – Project Principal



Vanessa has nearly 30 years of professional experience supporting redevelopment programs, design, and management, with a focus on housing and community recovery. She has developed program policies, procedures, and successful implementation strategies for complex projects and recovery efforts—often leveraging multiple complex funding requirements—in Alabama, Florida, Louisiana, Mississippi, New York, Pennsylvania, Texas, and Washington.

Since joining Witt O'Brien's, she has provided CDBG-DR support for the USVI, St. Charles County, Missouri, and the Town of Morehead City, North Carolina. She is also overseeing a project for California's Department of Housing and Community Development, focusing on subrecipient compliance monitoring for the \$1 billion+ Emergency Rental Assistance program grant. For the past five years, she has managed King County's (WA) \$1.39 billion COVID-19-related grant programs, which have included funding braiding, eligibility reviews, monitoring, and closeout of expenditures.

Prior to joining Witt O'Brien's, Vanessa served as an SME for New York State CDBG-DR-funded disaster recovery programs following Superstorm Sandy. The system managed over 40,000 applicants for rehabilitation programs serving single-family and multi-family homeowners, as well as buyout and acquisition programs for redevelopment, and Small Business assistance. It collected and contained all the programmatic requirements for HUD compliance, including, but not limited to, duplication of benefit analysis, eligibility review, cost estimating, award disbursement, and closeout. Furthermore, Vanessa has directly managed real estate development projects with budgets ranging from \$3 million to \$869 million, utilizing CDBG, CDBG-DR, HOME, Section 202/811, USDA RD, NAHASDA, and other funding sources, including in combination with LIHTC, Historic Credits, and New Markets Credits. She is also an experienced Technical Assistance Contractor, managing CDBG-DR and FEMA funding, as well as long-term community recovery planning—directly managing awards ranging from \$1 million single-purpose grants to \$1.35 billion multi-use allocations.

Zabrina Minor-Gregg, PMP, MBA – Project Manager



Zabrina is a grants management specialist with more than 15 years of experience in community development, affordable housing development, homelessness, and veteran programs. She is a Professional Grant Writer and a Project Management Professional (PMP), holding a NeighborWorks Professional Certificate in Affordable Housing Funding and Finance, as well as Community Development Block Grant (CDBG) Program Certification, among her training and certifications. She is also a HUD-certified Housing Counselor.

Since joining Witt O'Brien's in 2021, she has provided local government agencies and state-wide affordable housing groups with program leadership and technical expertise for end-to-end grants management support for the ARPA, ERA Program, and the Bipartisan Infrastructure Law (BIL)/IIJA.

Zabrina has managed over \$800 million in federal funds. She is currently managing the firm's support for the NCLM, which provides grants pursuance and management support to municipalities across the State. She is also providing grants management advisory services to numerous organizations throughout Alabama, including supporting end-to-end compliance for Jefferson County's \$126 million ARPA and \$90 million ERA programs.

Prior to joining Witt O'Brien's, Zabrina had 10 years of experience in organizations focused on community housing, supporting individuals experiencing homelessness, and providing housing for low-income populations. Through her various employments, she was responsible for ensuring compliance with HUD procurement and other guidelines and preparing HUD-required reports.

4.2.3 APPROACH AND CAPACITY FOR INDIVIDUAL TASKS

Witt O'Brien's has the expertise and capacity in each of the Task areas, as validated below. The following presents our approach, followed by brief bios for each task area, focusing on the directly relevant experience of our staff. Full resumes are presented in Section 5 below.

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

Witt O'Brien's approach to developing policies, procedures, and SOPs starts with assessing the current systems and controls to identify strengths, weaknesses, opportunities, and threats. To help mitigate any risk, we have experience assisting with policy and procedures manuals, programmatic and financial award and reporting templates, and a robust monitoring toolkit. Additionally, we are well-positioned to provide technical assistance to those administering the programs, ensuring end-to-end compliance with policies and procedures. Based on the assessments, we report our learnings and make recommendations for policies, procedures, and tools to support successful program management and realignment to meet funding requirements.

Witt O'Brien's has the corporate infrastructure, technical expertise, and experienced professionals to immediately assist the DCR in developing, updating, and maintaining written policies, procedures, and SOPs to ensure consistent, compliant administration of any DCR CDBG-DR program. Our team has successfully designed and implemented programs, ranging from small-scale initiatives to billion-dollar, multi-project recovery portfolios, utilizing proven methods for program design, budget development, staffing, and cost management. We begin with a comprehensive assessment of award terms, program design, internal controls, financial practices, and prior audits to identify compliance risks and opportunities for enhancing operational effectiveness. For programs already in place, we verify allocations and subawards to ensure alignment with HUD, state, and federal requirements, while mitigating the risks of noncompliance.

Building from this assessment, we develop practical tools that create strong internal controls and sustainable program performance. Our approach emphasizes efficiency, accountability, and proactive risk management through tailored SOPs, templates, and reporting structures. We combine national best practices with capacity building support for DCR staff, ensuring programs achieve compliance, optimize resources, and stand up to oversight.

To help mitigate delivery risks, we can assist with the following tools:

- Program-specific policies, SOPs, and closeout procedures that guide compliant workflows.
- **Templates, checklists, and reporting structures** to meet HUD, state, and federal requirements (DRGR, QPRs, Section 3, Fair Housing).

- **Monitoring toolkits** and training to strengthen internal controls, reduce risk, and prevent waste, fraud, and abuse.
- **Policies and Procedures Manual** to document key processes to drive the strongest possible internal control environment. This can be supplemented with internal staff training for capacity building.

Witt O'Brien's has provided program-specific policies, SOPs, and technical assistance for a variety of housing programs over the years. As an example, Witt O'Brien's has worked with VIHFA since 2017 to leverage the EHRVI/Sheltering and Temporary Essential Power (STEP) Program to coordinate emergency repairs on **over 8,000 homes** throughout the Territory. The \$750 million initiative entailed comprehensive communication and outreach, application eligibility review, case management, construction and compliance oversight, and financial reconciliation/closeout.

STAFFING PLAN:

Task 1 - Development of Policies, Procedures, & Standard Operating Procedures (SOPs)		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Michelle Little, MURP	Management Consultant IV	Project Support
Karen Patterson	Management Consultant IV	Project Support



Michelle Little, MURP. Michelle brings 17 years of experience in developing and managing large, complex grants programs involving Federal funding sources, including over \$4 billion in CDBG-DR funding. Michelle developed policy, procedures, and SOPs for CDBG programs, including the following:

- Since 2023, as the CDBG-DR Grants Specialist for the Town of Morehead City, NC
- Compliance and Monitoring Unit Head, NYC Mayor's OMB – CDBG-DR Task Force, New York, NY, for 6 years, where she established the Department and function at OMB.
- The City of New Orleans, while serving as Project Manager, City of New Orleans Office of Community Development – Disaster Recovery Unit (OCD-DRU) for 4 years.



Karen Patterson. Karen has over 15 years of experience with disaster recovery and mitigation programs, including management of over \$2 billion in CDBG-DR, CDBG-MIT, NDR, and Neighborhood Stabilization Program (NSP) grant assistance programs. This includes the development of policies, procedures, and SOPs throughout her career for grants management and disaster recovery programs. Her experience includes:

- Supported the development of policies and procedures for the USVI, including a fraud handbook and best practices for payment methods; guided the U.S. Virgin Islands Housing Finance Authority in drafting technical documents, policies, and procedures to manage \$1.8 billion in CDBG-DR funds
- As Section Chief at the California Department of Housing and Community Development, oversaw program development and implementation of federally funded housing and disaster recovery initiatives, including drafting program policies.

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

Witt O'Brien's has developed a methodology that is centered on grants management, monitoring, Compliance, oversight, and fraud prevention, including for federally funded programs such as CDBG-DR and other HUD-administered grants.

Our team conducts subrecipient management and monitoring, as well as compliance reviews, and creates dashboards and other tools to measure key performance indicators as needed. Our team is highly familiar with 2 CFR 200 (Uniform Guidance), HUD financial management requirements, and state-level fiscal controls. We have supported clients in establishing written policies that ensure the proper use and segregation of funds. We design and implement monitoring tools that enable grantees and subrecipients to comply with all federal and state requirements. As part of our support, Witt O'Brien's develops comprehensive tools and protocols for detecting fraud, waste, and abuse, including reporting mechanisms and staff training on tools and resources. We prepare monitoring plans and financial oversight tools that cover award approvals, reimbursement requests, drawdowns, and completed monitoring visits. Additionally, Witt O'Brien's has experience in developing financial dashboards and key performance indicators (KPI) tracking systems that allow program staff to identify issues early and complete corrective actions. By incorporating robust internal controls with transparent reporting, Witt O'Brien's ensures that DCR administers CDBG-DR funds with accountability and compliance.

Not only do we build systems to prevent fraud and ensure compliance, but we are also able to respond quickly and strengthen and enhance processes for new or emerging program concerns. For example, when a public social media post surfaced providing explicit instructions on how to defraud an Emergency Rental Assistance program, our team immediately strengthened fraud review using a systemwide approach consistent with 2 CFR 200.303 (internal controls) and Treasury/HUD program guidance. We established strict protocols, delivered mandatory fraud prevention training, and deployed cross-data matching, anomaly detection, and enhanced document verification to mitigate risks. All review actions and determinations were thoroughly documented in the system of record to support audit readiness, monitoring, and compliance with federal Uniform Guidance. This integrated approach not only prevented fraud, waste, and abuse but also reinforced program integrity and public trust in the responsible stewardship of federal funds.

Exhibit 6: Fraud Waste, and Abuse Training Materials

Prevention of Fraud, Waste, and Abuse

Jefferson County Emergency Rental Assistance Program

Understanding & Spotting Cases of Fraud, Waste, and Abuse

What is considered fraud, waste, and abuse?

Fraud and abuse of ERAP funds may be the result of:

- Unauthorized access to sensitive information.
- Filing false applications or claims.
- Providing false statements to obtain assistance funds.
- Diversion of benefits proceeds.
- Forgery.
- Promised services not delivered, and/or
- Misuse and mismanagement of the funds.

What should you look for?

- Examples of Applications that should be escalated:
 - ✓ Lease does not match the Tenant and/or Landlord, or other inconsistencies between the application and documentation.
 - ✓ Owner(s) of Property and Landlord do not match.
 - ✓ There are multiple applications/tenants for the same property.
 - ✓ Suspicious Landlord and/or Tenant behavior such as invalid phone numbers or no communication via phone or in-person.

Understanding Common Fraud, Waste, and Abuse Scenarios

Households (Tenants) Falsifying Applications	Landlords / Property Owners Falsifying Applications	Landlord / Tenant Collusion
<p>Household (tenants) provide falsified application information or supporting documentation used to determine tenant eligibility.</p> <p>EXAMPLE SCENARIOS</p> <ul style="list-style-type: none"> • Tenant does not live at the address listed. • Tenant falsifies documents or signatures. • Tenant intentionally misrepresents or fails to report income, assets and allowances. • Tenant falsifies property landlord information and/or housing crisis. • Tenant is adamant about receiving payment directly and landlord cannot be contacted via phone, email, or mail. • Tenant is not head of household or does not report all household members living in the unit. • Tenant overstating amount of rent needed or housing emergency. • Tenant applying for areas for months covered by preapproved/subsidized portion of rent. 	<p>Landlords obtain payments for unknown tenants, or falsify application information documentation to receive payment.</p> <p>EXAMPLE SCENARIOS</p> <ul style="list-style-type: none"> • Owners falsifying documentation to satisfy program requirements. • Landlord/Owner listed is not the legal recipient of rental payments. • Landlord and Tenant have the same property/unit address. • Owners collecting housing assistance payments for units not assigned by program participants. • Owners collecting extra or side payments in excess of family share of rent. • Owners knowingly submitting duplicate applications for the same unit. 	<p>Landlords and tenants working together to receive assistance for situations that are not eligible for rental assistance.</p> <p>EXAMPLE SCENARIOS</p> <ul style="list-style-type: none"> • Landlord and tenant knowingly submit fully completed applications with falsified information and documents. • Landlord and tenant knowingly overstate amount of assistance required (month of arrears, rent amount). • Tenant is a relative of the landlord and not an actual rent paying tenant.

How to Spot Potentially Fraudulent Assistance Applications

When processing applications for rental assistance, keep an eye out for the following key indicators:

SUSPICIOUS REQUIREMENTS	SUSPICIOUS PERSONAL INFO	SUSPICIOUS APPLICATION INFO	SUSPICIOUS ACTIVITY
<ul style="list-style-type: none"> • Tenant and/or landlord intentionally provides misleading or falsified documents that are required to receive benefits. • Dates of docs inconsistent with benefit claim or back dated to satisfy requirements. • Tenant/Landlord only on docs is drastically different from App Form (address, names, rent, etc.). • Handwritten or manually altered docs (e.g., Revised, copied, whitened out, pre-printed, dated notes). • Complete absence of verifiable documents (e.g., 1040's, W2, Notice of Arrears, acceptable photo ID). 	<ul style="list-style-type: none"> • Inconsistencies with state verified identifiers: license numbers, SSN, driver's licenses, etc. • Does not provide a phone number or states they don't have a phone number. • Tenant/Landlord have the same unit address, last name, and/or contact information. • Emails or telephone numbers are not valid. • Applicant cannot be verified through any trusted third party data source or valid documentation. 	<p>Information submitted with the application is intentionally misrepresented and cannot be verified with supporting documentation in outreach.</p> <p>What should I look out for?</p> <ul style="list-style-type: none"> • Rental material misrepresentation of application info: completely false address, falsified tenant. • Multiple claims submitted for the same property address. • Property address is not a valid eligible residence (PO Box, hotel, place of employment, etc.). • Tenant/Landlord have the same address or last name. • Multiple addresses listed on app and supporting forms. • Benefit amount/months covered is equal to the max amount without any supporting evidence. • Claims are incompatible with residence, average rent, and/or income. 	<ul style="list-style-type: none"> • Aggressive pressure from landlord demanding for a quick decision or moves to the comments if app not processed. • Applicant pushes for smaller benefit amounts to obtain funds. • Applicant refuses to be contacted by phone, avoids in person interactions, and only communicates via email. • Applicant or landlord does not know basic info that would be common to remember. • Frequent updates app details to support claim. • Pattern of tenant closing out apps due to lack of req's, then immediately re-opening a new app with the same details.

STAFFING PLAN:

Task 2 - Financial Compliance, Oversight, and Fraud Prevention		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Tara Vogeliën	Management Consultant IV	Project Support
Brenda Locke	Management Consultant IV	Project Support



Tara Vogeliën, MSc, MBA, CFE. Tara has over 20 years of experience in financial compliance and fraud prevention, supporting billions in grant funding. Most recently, her portfolio has supported over \$700 million in federal funds.

- As a Management Consultant, University of North Carolina at Pembroke, NC, Tara guided and assisted faculty and staff principal investigators with post-award administration of externally funded grants; provided support to the Grants Accountant in the Controller's Office, reviewing and reconciling financial expenditures, and oversaw and managed budgetary and regulatory aspects of the sponsored activities portfolio.

- As the Fiscal Lead for Witt O'Brien's support of King County, WA, she provides daily fiscal operations management; beneficiary and contractor management; accounting; and revenue oversight, including compiling and submitting all federal reporting required for the program, Single Audit Report (SEFA) Reporting, and serves as the direct liaison for third-party audits and Federal Single Audits.
- A former Federal Contract Manager, she was responsible for controlling cash flow, budgeting, and operations for multi-million-dollar environmental government contracts.



Brenda Locke. Brenda has nearly 30 years of experience in fiscal management and accounting, with extensive work in financial compliance, oversight, and fraud prevention across government, non-profit, and private sectors. With experience in managing fraud detection and resolution using forensic accounting techniques, she has also led compliance and risk management efforts for large-scale federally funded programs totaling hundreds of millions of dollars. In these roles, she managed full

lifecycle grant and subrecipient oversight, monitoring, reporting, and audits. Some examples include:

- As the Lead Fiscal and Compliance Advisor/SME for Witt O'Brien's support of Jefferson County, AL, since 2022, Brenda has been responsible for the fiscal and compliance management of all of Jefferson County's ARPA-funded SLFRF and ERA Programs and projects totaling \$187 million, including full life cycle grant and subrecipient management, compliance, monitoring, reporting, and closeout.
- As Lead Fiscal Advisor, Brenda oversaw the fiscal management of King County's COVID-19 programs with multiple funding sources, including the King County general fund, CARES CRF, ARPA SLFRF, and FEMA PA funding. These programs involved over 60 subrecipients and numerous locations, with expenditures exceeding \$40 million. She facilitated program fiscal management across multiple divisions, conceptualizing, developing, and implementing strategies, systems, standards, and plans for fiscal and budgetary functions.

TASK 3 – Duplication of Benefits (DOB) Compliance

With an extensive understanding of DOB prevention, our team is well-positioned to support DCR in establishing and maintaining a comprehensive DOB framework. Our team has developed written DOB prevention policies that comply with HUD guidance, along with standardized templates, forms, and workflows to ensure consistent eligibility determinations and benefit calculations. We also provide DOB processing and compliance management, including the integration of data matching tools to detect and mitigate any potential risks. Witt O'Brien's applies a rigorous review process to identify potential DOB across all program activities, especially where multiple federal funding streams may overlap. Witt O'Brien's combines prevention policies, active monitoring, documentation protocols, and corrective action procedures to ensure full compliance. Our approach also emphasizes audit readiness; our documentation and tracking systems are designed to withstand reviews by the HUD Office of Inspector General (OIG), state oversight, and federal monitoring.

During the implementation of various Emergency Rent Assistance programs, such as those in King County, WA, and Jefferson County, AL, our team collaborated closely with software providers to utilize large datasets and address system-level concerns regarding duplication of benefits. In King County, we successfully integrated systems through API connections. In Jefferson County, we ensured that all

providers used the same system of record, which facilitated an integrated data comparison for duplication of benefits checks. At every step, we will support the integration of these functions into the governing systems.

STAFFING PLAN:

Task 3 - Duplication of Benefits (DOB) Compliance		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Anna Valdez	Management Consultant IV	Project Support
Zulma Perez	Management Consultant IV	Project Support



Anna Valdez, CGMS. Anna has over 11 years of experience in expansive public sector knowledge, product development, and enterprise implementation, as well as people and budget management, and business process improvement.

- Supported the State of Arizona with the implementation of state-level duplication of benefit policies.
- Supported software requirements gathering, workflows, and technology implementation of duplication of benefit reviews and templates, and their integration for single-source program documentation and efficiency.



Zulma Perez. Zulma has over 12 years of experience in grant compliance and disaster-related funding, with experience supporting federal, state, local, and community-based organizations in managing complex funding streams.

- She is well-versed in federal Uniform Guidance and requirements from HUD, FEMA, DOE, and the U.S. Treasury, helping governments, nonprofits, and tribal entities stay compliant, identify risks for early mitigation, and support program development and administration across funding sources.
- Has developed audit programs, subrecipient monitoring frameworks, and risk assessments, while also providing technical assistance to strengthen internal controls and financial reporting.
- Her background includes creating compliance procedures to prevent, detect, and resolve duplication of benefits (DOB)—a key requirement in CDBG-DR and other disaster funding programs, as well as the development of tailored compliance and monitoring programs across various programs.
- Her work also includes reconciling expenditures back to the General Ledger and other financial tracking mechanisms to ensure costs are properly allocated, allowable and reasonable, and not duplicated across multiple funding streams. She has applied these practices across FEMA, HUD, Treasury programs, and many others, helping ensure funds are appropriately expended and reported, and withstand federal and state reviews and audits.

TASK 4 – Procurement Compliance and Monitoring

Procurement Compliance: Our team will provide comprehensive support to ensure procurement compliance with both federal and state requirements. We will design and implement processes aligned with 2 CFR 200 standards, including competitive procurement methods, cost reasonableness, conflict of interest safeguards, and required documentation. Additionally, we will tailor our procedures to meet the specific statutes, regulations, and administrative policies of the State of North Carolina. **This includes supporting solicitation development, bid evaluations, contract monitoring, and record-keeping practices that withstand federal and state audits.** By providing technical assistance, staff training, compliance reviews, and hands-on monitoring, our team will help ensure that procurement activities are efficient, transparent, and defensible, thereby minimizing the risks of disallowed costs and positioning the program for long-term success.

Monitoring: Witt O'Brien's will assist in developing programs that integrate requisite reporting and compliance requirements, helping to prevent and mitigate fraud, waste, and abuse. This will include tailored approaches to track the performance of individual projects, subrecipients, and contractors. Our work will consist of:

- Creating a monitoring plan to oversee the creation of project allocation and disbursement of funds according to agreements, recapturing of funds, and budget monitoring.
- Conducting all appropriate checks, such as DOB review, calculation before project award, and again before closeout.
- Using a database to monitor, track, and reconcile all payment requests and expenditures against the agreed upon schedule and costs to identify any divergence.
- Streamlining the reporting process to ensure continued compliance and provide post-award grants administration.

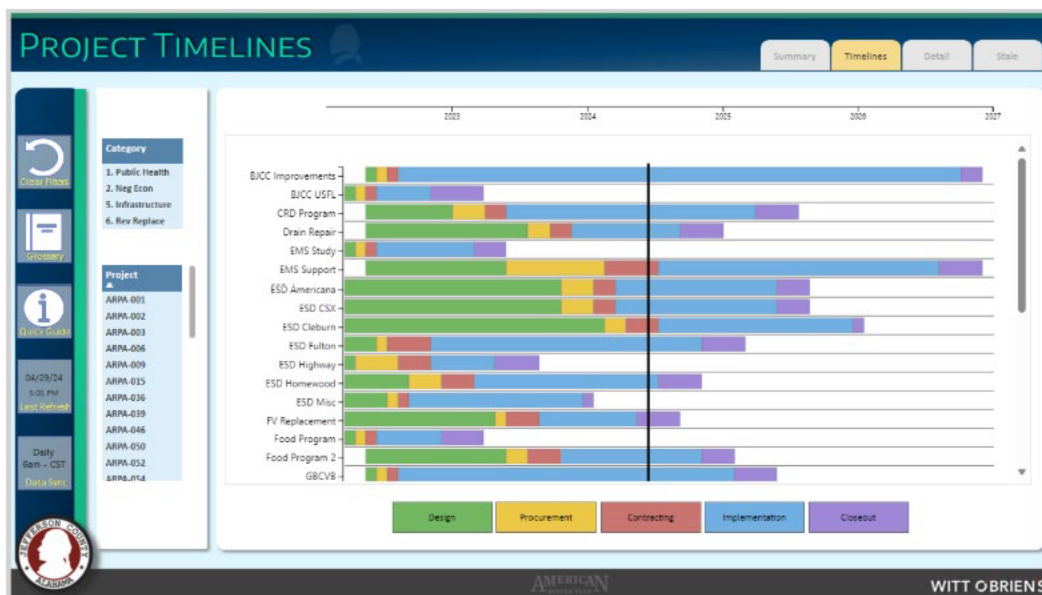
Monitoring typically falls into two types:

- **Financial Monitoring.** Financial monitoring of grant programs includes a detailed financial review to ensure compliance with financial guidelines and accounting practices. These reviews include: (1) forecasting and burn rate modeling; (2) determinations on the allowability of grants expenditures; (3) review of grants expenditures compared to the approved budget; (4) DOB analysis.
- **Performance and Outcomes Monitoring.** Performance monitoring is conducted to determine whether the terms and conditions of the grant are being met. Activities include: (1) developing and collecting data on KPIs such as milestones, percentage of completion, period of performance metrics, financial benchmarks, etc., and (2) determining methods for oversight and reporting to the funder and collecting from subrecipients/

We provide the tools to create oversight governance structures for performance monitoring. Our oversight begins with the development and implementation of quality assurance and quality control activities (QA/QC). We will develop KPIs and have the tools to track and provide transparent reporting on project metrics, potential risks, and opportunities.

Throughout our various engagements, we have developed tracking systems to provide oversight of projects and ensure that all objectives are met on budget and on time (see **Exhibit 7**). This system has become an invaluable resource to our clients who routinely request information from the solution for other business purposes. We can ensure full compliance, providing the right resources to each project and client.

Exhibit 7: Sample Project Budget and Scheduling Dashboard



STAFFING PLAN:

TASK 4 – Procurement Compliance and Monitoring		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Chelsea Morganti, CFM	Management Consultant IV	Project Support
Sarah Perry	Management Consultant III	Project Support



Chelsea Morganti, CFM. Chelsea is a Certified Floodplain Manager (CFM) and holds a certificate for procurement, for state and federal procurements. She brings 11 years of experience in mitigation grants management, community assistance, and program management and implementation.

- As the Mitigation Specialist, New Mexico Department of Homeland Security and Emergency Management, Santa Fe, NM, Chelsea reviewed and approved all procurement, contracts, and invoicing associated with sub-grant agreements. She drafted Scopes of Work, budgets, and schedules for New Mexico HMA grants and sub-grants. She has firsthand experience managing and monitoring all awarded projects through to closeout, ensuring completion occurred in compliance with all federal, state, and local requirements.

- As SHMO for New Mexico, Chelsea managed 17 disasters and non-disaster HMA grants. She facilitated 113 mitigation plans and projects through all stages of sub-granting, from application to closeout.



Sarah Perry, MPPM. Sarah brings 18 years of experience in policy analysis, organizational and project leadership, and grants management capacity building. She supports procurement compliance and monitoring, manages large-scale grant projects, and assists municipalities with comprehensive grant lifecycle projects, from grant pursuit through implementation to successful closeout.

- As a Research and Planning Analyst for the Eastern Municipal Water District, Sarah completed a procurement analysis and is analyzing labor compliance and monitoring support for various construction projects—including technical assistance and training, material development (including contractor packets and tools for use/implementation), review of contractor (and subcontractor) payroll reports, and on-site wage interviews.

TASK 5 – Claims, Appeals, and Case Reviews

With an extensive understanding of the full grants management lifecycle, Witt O'Brien's has supported clients from initial funding applications through case-specific requests, appeals, and compliance reviews. Our team has developed written procedures, escalation protocols, and decision-making workflows to ensure effective management. We have also designed standardized documentation tools, such as review checklists, decision logs, and applicant notification templates, to strengthen program compliance and withstand audit reviews.

Witt O'Brien's's experience includes providing technical assistance to more than 100 ARPA-related engagements. We developed allocation strategies and allowable uses of CSLFRF. Witt O'Brien's has delivered over 500 briefing and training events regarding the Federal requirements, including CSLFRF, and Uniform Guidance, and other grant management protocols. Witt O'Brien's's depth of training and compliance support enables us to prepare staff and subrecipients to apply case review procedures consistently and equitably. Our emphasis on audit readiness ensures that DCR will be ready to respond effectively to inquiries from HUD, state agencies, or other oversight agencies related to case determinations. Fraud prevention processes are integrated at each claim and appeal process, ensuring integrity in the project outlays.

Our experienced team has developed checklists, templates, and phone scripts for claims, appeals, and case reviews across our multi-billion-dollar ERA portfolio. Providing right-sized technical assistance to partners, vendors, and community organizations engaged in supporting the work. We have developed protocols that detect and escalate claims to a higher level of review in the appeals process, further ensuring risk management.

STAFFING PLAN:

TASK 5 – Claims, Appeals, and Case Reviews		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance

TASK 5 – Claims, Appeals, and Case Reviews

Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Reginald Givens	Management Consultant III	Project Support
Tessa Brooks	Management Consultant IV	Project Support



Reginald (Reg) Givens. Reg is an affordable housing assistance program expert and a mortgage underwriter with more than 20 years of experience in housing-related grant programs and homeownership financing programs. He provides leadership and advisory services for large, complex grant programs for State housing agencies. He is a recognized SME in case review, based on years of operating and managing mortgage lending, mortgage payment assistance, and rental payment assistance programs.

- Specifically, and recently, he has supported the Delaware and Minnesota ERA. These programs administered and delivered \$63M to 12,816 households (DE) and \$167M to 30,975 households (MN). Additionally, he supported the Kansas HAF, which provided \$50 million to 4,351 households. Based on the case review counts of the ERA and HAF programs, approximately 9,000 appeals were successfully processed.



Tessa Brooks. Tessa brings over 20 years of experience serving communities at-risk. She has led and managed emergency housing rental assistance programs in four states, overseeing application case reviews, claims, and appeals, with a focus on delivering customer service, accuracy, proficiency, and timely results, while maintaining compliance with federal regulations and state policies. She successfully facilitated the engagement of all stakeholders in a robust system for analyzing claims,

assessing appeals, and producing high-quality case reviews to deliver targeted results for the client's constituents.

- Partnering with Minnesota Housing Finance Agency's Emergency Rental Assistance Program (RentHelpMN) encompassed multiple layers of quality case and appeal review, direct and compassionate communications with claim applicants, disbursement recipients, and community-based organizations to ensure accuracy and timely case reviews. With a consumer focus, the program delivered over \$523 million in direct rental and utility assistance to 78,175 at-risk households in Minnesota from 2021 to 2024 through quality case review, appeal review and decision-making, maintaining a full-time call center, and claims processing of 143,831 applications.
- Partnering with KHRC to administer the Kansas Emergency Rental Assistance Program (KERA) provided over \$290 million in emergency rental and utility assistance to more than 82,000 at-risk Kansas residents (32,000 households) over a year. The turnkey services of: program consulting, policy/process advising, application case review, appeal review and decisioning, over 60,000 application claims processing, data reporting, and maintaining a full-time call center led to positive outcomes for KHRC and at-risk Kansas residents.

TASK 6 – Action Plan Development and Amendments

Witt O'Brien's is committed to supporting DCR in the preparation, revision, and submission of CDBG-DR Action Plans and amendments in full compliance with HUD requirements. Our team has experience drafting Action Plan language, preparing supporting documentation, and compiling HUD submission packages that meet regulatory standards. We also assist with the creation and maintenance of public comment records, including documentation of stakeholder engagement, responses to comments, and compliance with citizen participation requirements outlined in HUD's CDBG regulations.

Our team has experience developing a range of practical toolkits and standardized resources to help our clients streamline the development and amendment of Action Plans for various federally funded programs. Our approach ensures consistency and accuracy while maintaining the flexibility necessary to address evolving community recovery needs. Witt O'Brien's will support DCR in developing and advancing HUD-compliant CDBG-DR Action Plans that are responsive to local priorities.

STAFFING PLAN:

TASK 6 – Action Plan Development and Amendments		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Karen Patterson	Management Consultant IV	Project Support
Dan Petrelli, MUPD	Management Consultant III	Project Support



Karen Patterson. Karen has over 15 years of experience with disaster recovery and mitigation programs, including management of over \$2 billion in CDBG-DR, CDBG-MIT, NDR, and NSP grant assistance programs. This includes the development of policies, procedures, and SOPs throughout her career for grants management and disaster recovery programs. Her experience includes:

- Leading the development of the USVI \$1.8 billion CDBG-DR Action Plan and program guidelines for the USVI housing rehabilitation, multi-family development, public housing, infrastructure, and economic revitalization programs territory-wide.
- For 10 years as the Grant Management Section Chief for California's Department of Housing and Community Development (DHCD), responsible for oversight and management of all agency HUD-funded programs. She was responsible for implementing the State's annual HUD allocations, as well as the \$230 million NSP, making a significant and timely impact for households affected by the housing and financial crisis.



Dan Petrelli, MUPD. Dan has six years of experience in municipal community development and grants programs, including HUD's CDBG and Housing programs. His experience includes:

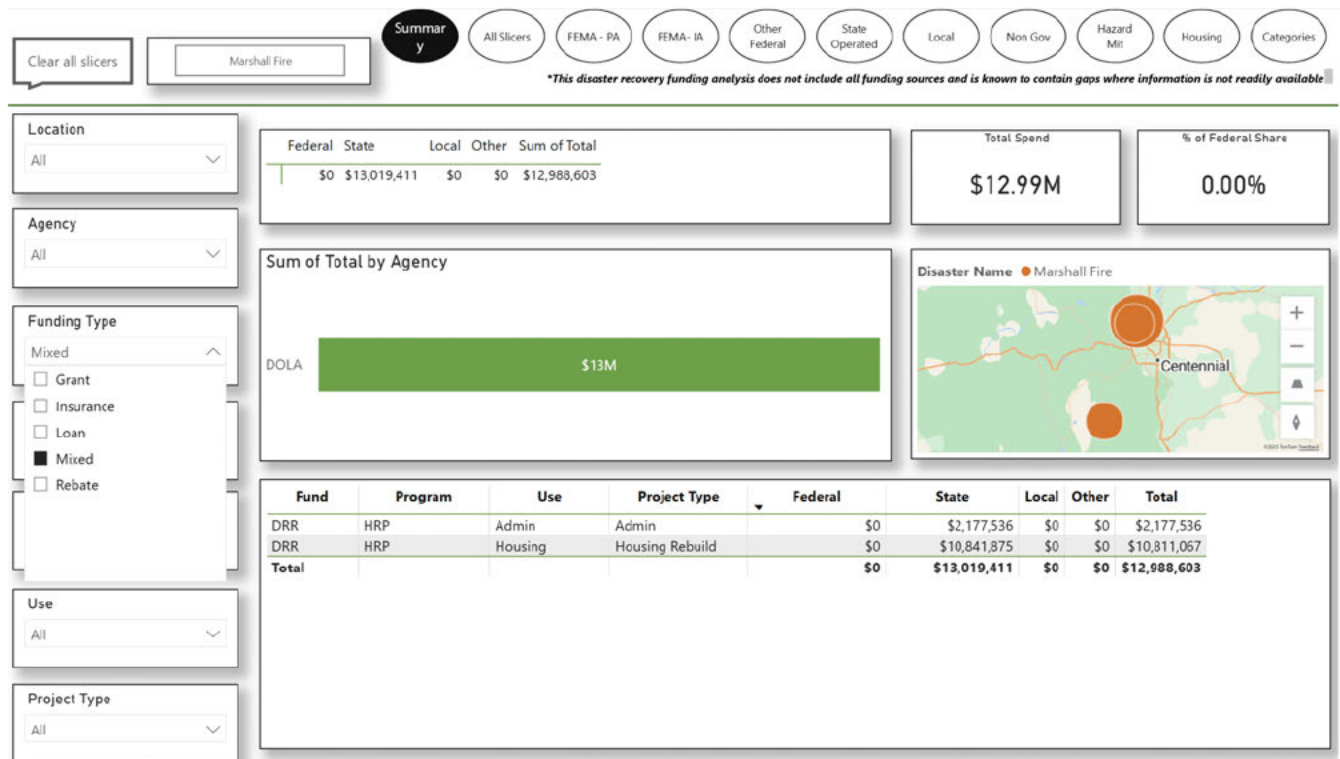
- As Community Development Manager, City of Euclid Department of Planning and Development, OH, he wrote and submitted Annual Action Plans and the Consolidated Annual Performance and Evaluation Report (CAPER).
- Dan has been responsible for managing the CDBG annual budget, compliance with 2 CFR 200 administration and procurement standards, and conducting drawdowns to request reimbursement from HUD. He also brings experience preparing environmental reviews for projects receiving CDBG funding in accordance with 24 CFR Part 58.

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

Witt O'Brien's provides robust data analysis services to inform program design and resource allocation. Our team has experience conducting unmet needs assessments, market studies, gap analyses, and developing resource allocation models across a range of federally funded recovery and mitigation programs. Our analyses are tailored to reflect local needs and policy priorities so that programs are data-driven and compliant with federal and state requirements.

We can integrate data from multiple sources (FEMA, SBA, NFIP, HUS, and local municipal governments) to support comprehensive needs assessments. Our geospatial specialists can produce detailed maps, dashboards, and other visualizations to support planning, decision-making, and public reporting requirements. All tools are designed to be both technically sound and accessible, enabling stakeholders to understand complex data and make informed decisions.

Exhibit 8: Program Dashboard



STAFFING PLAN:

TASK 7 – Needs Assessments, Market Analysis, and Geospatial Support		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Chelsea Morganti, CFM	Management Consultant IV	Project Support
Anna Valdez	Management Consultant IV	Project Support



Chelsea Morganti, CFM. Chelsea is a CFM and holds a certificate for state and federal procurements. She brings 11 years of experience in mitigation grant management, community assistance, and program management and implementation, including needs assessments, market analyses, and the effective use of GIS tools and geospatial information.

- As SHMO for New Mexico, she contributed to the NM SHMP and overhauled the state's Administrative Plan in 2017 and 2021, updating the Mitigation Standard Operating Guidelines, Sub-Grant Orientation Packet, and funding methodology. During the 2021 funding application cycle, she processed 48 project Notices of Interest totaling more than \$100 million in requested funds. She regularly represented the agency at local, state, and national conferences.
- Chelsea served as Deputy Planner, updating the Colorado Enhanced State HMP. She facilitated meetings with all 28 state agencies, presented considerations for access and functional needs and underserved populations, and profiled state agency mitigation activities.



Anna Valdez, CGMS. Anna has over 11 years of experience in the expansive public sector, including product development, enterprise implementation, people and budget management, and business process improvement. Needs and market analysis were the cornerstones of her success.

- As the Technical Product Manager at Euna Solutions, she collaborated on technical and business assessments of product rebuilds in alignment with customer needs. Anna conducted market research and analysis to identify market opportunities, customer needs, and the evolving competitive landscape.
- As the Senior Program and Performance Manager, State of Arizona, Executive Office of the Governor, Anna led the program team responsible for managing over \$2 billion in COVID-19 relief programs, resulting in the management and oversight of over 2,000 state-wide grantees. Her work required communication strategies with the grantee community, the public, and the highest levels within the state. She guided product decisions to identify, prioritize, and meet the needs of customers and end-users.

TASK 8 – Program Performance Monitoring and Evaluation

Our team, via our project management tools, will consult and advise the DCR on verbal and written communications that provide a clear dashboard of project timelines, work tracking, and deliverables. This will enable the DCR to have the necessary information for informed decision-making and compliant grant operations, with no surprises. Our regular project status updates will include a review of deliverables, projections of project progress, successes to date, and any other relevant issues as they arise.

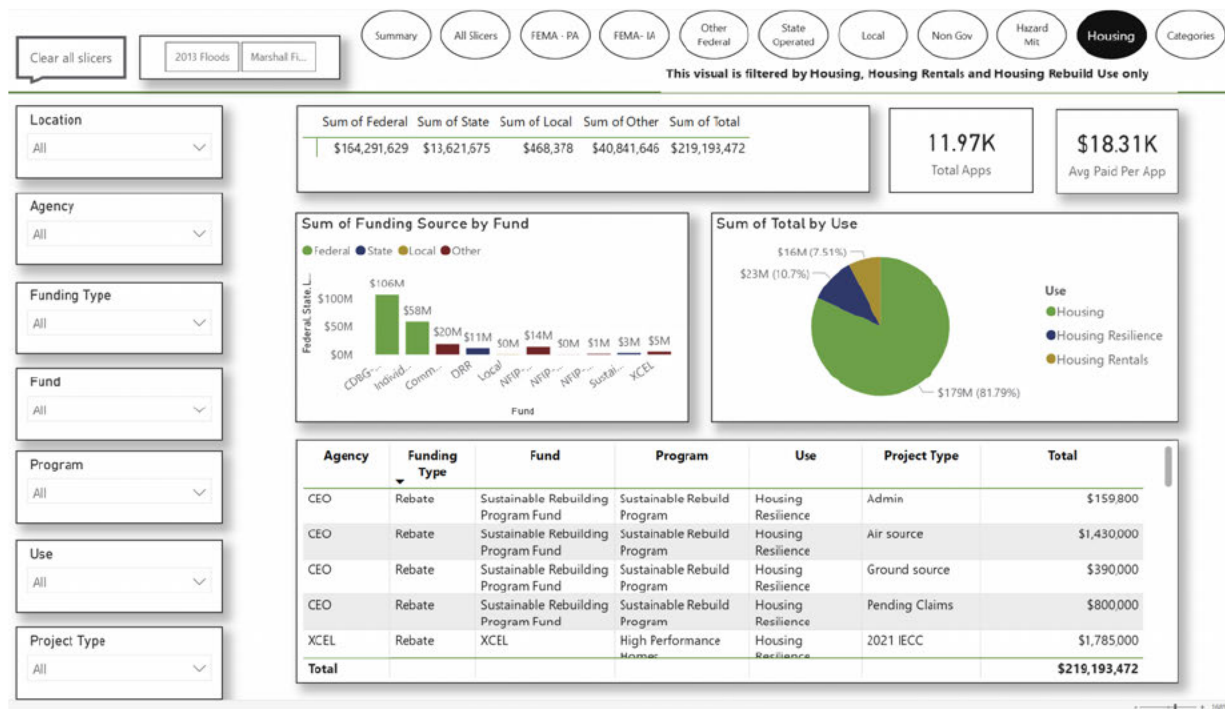
We are prepared to use a reporting format already in use by the DCR, or we can tailor our standard reporting format to meet your needs. Our formal communications will include monthly and annual reports detailing progress from the previous month, including information about awards pending or received, significant strategic developments, relevant funding opportunities, and any grant applications in progress or that have been submitted. This information will be kept up to date, as it is a critical component of managing a funding portfolio and will assist in the development of long-term funding strategies.

We will ensure that the DCR meets expenditure deadlines and maintains compliance with state and federal rules and regulations. We will ensure that financial obligations are met, disbursements are aligned with subrecipient grant agreements, and programmatic, financial, and closeout forms and documentation are prepared and submitted promptly, utilizing the proper Federal- or state-required systems. We will work closely with DCR accounting staff, department heads, and subrecipients throughout the process.

With an extensive understanding of program performance monitoring and evaluation, our team is poised to provide the following services based on our experiences with this:

- (1) developing and collecting data on KPIs such as milestones, percentage of completion, period of performance metrics, financial benchmarks, etc., and
- (2) determining methods for oversight and reporting to the funder, and collecting from subrecipients. Witt O'Brien's will provide the tools to create oversight governance structures for performance monitoring. Our team has utilized this approach on various engagements and can ensure full compliance, providing the right resources for each project.

Exhibit 9: Program Monitoring Dashboard



STAFFING PLAN:

TASK 8 – Program Performance Monitoring and Evaluation		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Tara Vogeliën, MSc, CFE	Management Consultant IV	Project Support
Kailee Wolterstorff, MA, CGMS	Management Consultant III	Project Support



Tara Vogeliën, MSc, CFE. Tara has over 20 years of experience in financial Compliance and fraud prevention, supporting billions in grant funding. Most recently, her portfolio has supported over \$700 million in federal funds.

Designed performance metrics, collected and analyzed program data, and applied evaluation methodologies with visualization tools such as Power BI and Power Query to assess program effectiveness and ensure accountability.

- Supported subrecipient monitoring, compliance tracking, and fiscal performance reviews across large-scale programs, including the ARPA and Emergency Rental Assistance initiatives.
- Conducted internal assessments, applied quality improvement principles, and led efforts to enhance the effectiveness of research and administrative processes. Her work consistently emphasizes using data-driven evaluation to improve outcomes, streamline operations, and ensure that programs meet both performance and compliance goals

Kailee Wolterstorff, MA, CGMS. Kailee brings a unique combination of expertise, with eight years of experience in grants research, application development, and monitoring grant funding for compliance.



▪ Kailee worked directly with local, tribal, county, and state governments to deliver moderate to complex grants management software solutions as a Senior Solutions Engineer, requiring her knowledge and ability to ensure effective monitoring and

evaluation.

- As a Grants and Records Management Administrator, she has overseen grant implementation, providing guidance to project teams, monitoring progress, and ensuring compliance with grant requirements and objectives
- As a Senior Grant Management Specialist for the Kansas Infrastructure Hub, provides support and oversight.

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

The Witt O'Brien's team has experience supporting compliance with civil rights, fair housing, labor standards, and historic preservation requirements across myriad federal and state funding sources, including: ARPA Coronavirus Preparedness and Response Supplemental Appropriations Act, CARES Act, HAF Program, CDBG programs, Robert T Stafford Disaster Relief and Emergency Assistance Act-funded efforts, USDOT programs, USDOL programs, and state-administered programs such as LWCF and RTP. Our team possesses in-depth knowledge of regulatory requirements, including 2 CFR 200, 24 CFR 570, the Fair Housing Act, Section 3, the Davis-Bacon Act, and Section 106 of the National Historic Preservation Act. Our team has in-depth legal and regulatory knowledge of all relevant federal regulations for grants management, and our processes ensure that compliance has precedence.

We will provide DCR technical assistance, monitoring, and documentation to support compliance in the key areas listed above, including Section 3 tracking tools and reporting templates, certified payroll review processes, wage verification procedures, and Davis-Bacon/Copeland Act compliant resources. We also prepare Fair Housing and Affirmatively Furthering Fair Housing (AFFH) documentation, civil rights compliance materials, and National Objective justifications for LMI benefit, slum/blight prevention, or urgent need. Our team is experienced in supporting historic preservation compliance through coordination with the State Historic Preservation Office (SHPO), Section 106 consultation records, mitigation agreements, and project review forms. All deliverables are supported by robust

quality assurance/quality control (QA/QC) processes to ensure they are audit-ready and aligned with all relevant federal and state requirements.

STAFFING PLAN:

TASK 9 – Civil Rights, Fair Housing, Labor Standards, and Historic Preservation		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Daniel Petrelli, MUPD	Management Consultant III	Project Support
Michelle Little, MURP	Management Consultant IV	Project Support



Daniel Petrelli, MUPD. Daniel has six years of experience in municipal community development and grants programs, including HUD's CDBG and Housing programs. His experience includes:

- Daniel is assisting two Ports with the development and implementation of their Title VI responsibilities, such as subrecipient monitoring, implementation plan review, and providing best practices, and the development of policies and procedures for Title VI employee training.
- As the Community Development Manager for the City of Euclid, Daniel was responsible for administering the CDBG. The community streetscape improvements, weatherization, first-time homebuyer assistance, and a storefront renovation, among others. Daniel oversaw the wage verification process and completed and submitted historic preservation, Section 106 reports, to the state for review. Regarding fair housing, he procured and managed a fair housing contractor that provided tenants' rights information throughout the City and developed an analysis of impediments related to housing.



Michelle Little, MURP. Michelle brings 17 years of experience in managing large, complex grants programs involving Federal funding sources, including over \$4 billion in CDBG-DR funding. She has overseen compliance for HUD Community Development Block Grant-Disaster Recovery (CDBG-DR) programs, which required adherence to Section 3 and Davis-Bacon labor standards, fair housing rules, and civil rights requirements. Her work has included technical assistance and training on Title VI Civil

Rights compliance, labor compliance monitoring (including payroll review and wage interviews), and policy reviews to ensure alignment with Federal housing and workforce development regulations. She has conducted this work for:

- The Town of Morehead City, NC, since 2023 as Witt O'Brien's CDBG Grants Specialist
- New York City's Compliance and Monitoring Unit Head, for CDBG-DR Task Force, New York, NY, for 6 years

- The City of New Orleans, while serving as Project Manager, City of New Orleans Office of Community Development – Disaster Recovery Unit (OCD-DRU for 4 years.

TASK 10 – Audit Readiness and Monitoring Support

Throughout the engagement, we will collect thorough documentation, including explanations of how DCR made program decisions and information that demonstrates compliance with relevant regulations. This documentation will be stored in program-specific folders to ensure DCR is always audit-ready. Before any audit or review, we will review the program and project files to ensure DCR is prepared. We will assist with monitoring of all aspects of the grant and resolve issues early to mitigate potential audit findings. Our team will resolve any requests for information (RFIs), justification, audit findings, and eligibility appeals, and work to resolve disputes with Federal funders, external auditors, community partners, or other agencies—including, but not limited to, preparing appeals.

We assisted the Harris County, Texas Office of County Administration (April 2021 – September 2024) in initiating programs, providing technical assistance and training, determining eligibility, and performing compliance monitoring and closeout for a variety of projects under the \$915 million direct allocation of ARPA CSLFRF. This work involved developing and implementing tools and templates for risk monitoring and closeout, as well as conducting successful audits.

STAFFING PLAN:

TASK 10 – Audit Readiness and Monitoring Support		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Emily Camp, MPA, PMP	Management Consultant IV	Project Support
Allison Byrne	Management Consultant IV	Project Support



Emily Camp, MPA, PMP. Emily brings 20 years of professional experience in disaster preparedness, response operations, and recovery grants management for government and community organizations. As a senior management consultant, Emily engaged in organizational design, process reengineering, and strategic governance. She conducted a comprehensive root-cause analysis of audit findings from both OIG and GAO reports. She has undertaken this work for:

- As the Monitoring and Compliance Lead for Harris County's \$313 million Affordable Housing SLFRF portfolio, Emily led the compliance and monitoring activities for the multi-family acquisition and development, single-family acquisition and rehabilitation, and legal aid and eviction services programs.

- As the Subrecipient Monitoring Lead for Jefferson County, Alabama's \$85 million ERA Program, Emily developed monitoring protocols and evaluation frameworks and evaluated subrecipient financial management systems and program implementation for compliance.



Allison Byrne. Allison is a policy advisor with nearly 20 years of experience in developing and leading the implementation and optimization of government programs, most recently for large, complex grant programs in New York, New Jersey, and Texas.

- As the Strategic Advisor and Production Manager for the New York State HAF Program, Allison has been a key advisor for the state's \$539 million program, one of the largest in the country. This program is administered by the Department of Homes and Community Renewal in partnership with the New York Center for Sustainable Neighborhoods. Allison has been overseeing applicant processing, ensuring ongoing monitoring with a focus on preventing any issues that could lead to audits.
- As the Project Manager for the Texas Department of Housing and Community Development, Allison supported the program, ensured ongoing monitoring for full compliance, and identified and monitored effective outreach strategies to reach low-income and minority communities. She led the development of tools and materials to support these organizations (training materials, reporting templates, and program performance tracking dashboards).

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

Our team is well-positioned to provide technical expertise in support of project development, review, and compliance, leveraging our licensed Professional Engineers (PEs) and a proven track record of working directly with local City and County engineers.

Our team has extensive experience conducting reviews of engineering plans prepared by subrecipients, as well as developing and validating cost estimates and feasibility studies to ensure projects are realistic, efficient, and financially sound. We perform compliance assessments for infrastructure and mitigation projects, while also providing feasibility analyses of infrastructure, economic development, and housing initiatives to confirm long-term sustainability. In addition, we conduct construction progress inspections across infrastructure, housing, and economic development projects, ensuring adherence to approved plans, quality standards, and funding requirements. These technical services are supported by our demonstrated success in delivering complex, affordable housing and community programs. This includes the rehabilitation of nearly 70 senior-occupied homes, the development of 30 new homes in partnership with Habitat for Humanity, targeted non-profit assistance, and the creation and preservation of over 160 elderly rental units through innovative compliance and Treasury-approved strategies. This combination of PE expertise, hands-on project support, and proven program delivery ensures that projects are both technically sound and fully compliant.

STAFFING PLAN:

TASK 11 – Technical and Engineering Support for Infrastructure and Housing Projects		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Sandeep Singh, PMP, CCM	Management Consultant II	Project Support
Len Wright, Ph.D, PE	Management Consultant III	Project Support



Sandeep Singh, PMP, CCM. Sandeep brings over 20 years of experience in construction and project management, with a focus on disaster recovery. He is highly adept at Benefit-Cost Analysis (BCA). He has supported projects under the HUD CDG-DR, FEMA PA, HMGP, and STEP programs.

- Following Hurricane Maria in the USVI, Sandeep served as a Senior Project Manager for the FEMA Emergency Home Repair/STEP program in St. Croix. He collaborated with FEMA, consulting firms, and the Virgin Islands Housing Finance Authority, as well as local partners, to develop Project Scopes, Preliminary Cost Estimates, and monitor permits. His primary responsibilities included reviewing Preliminary Damage Assessments, Damage Descriptions and Dimensions, SOWs; approving drawings and specifications of roof repairs and roof replacement with subcontractors; conducting detailed estimates using RSMeans, CostWorks, and FEMA CEF; and assisting with Closeout.
- As part of program management support for the Virginia Department of Emergency Management's BRIC and FMA programs, Sandeep provided technical assistance to a variety of sub-applicants, including municipalities, counties, and public utilities. He provided project scoping, cost estimating, and conducted and documented BCAs in compliance with FEMA guidelines. Sandeep performed and documented 15 BCAs for a range of mitigation projects, including stormwater drainage improvements and floodplain acquisitions, backup power generation for water treatment plants and emergency shelters, wind-hardening and floodproofing for public facilities, and roadway elevation and bridge improvements.



Len Wright, PE, PhD. Len brings 35 years of experience in planning, designing, and managing water utilities and related infrastructure systems.

- As the Engineering SME for the New Mexico Department of Homeland Security and Emergency Management, Len has been developing custom tools to address Hydrologic and Hydraulic evaluations of damaged drainage infrastructure in these areas. Methods included geospatial evaluation of burn-scar runoff hydrology considering climate change, sediment generation and control, and a custom hydraulic model to estimate culvert and drainage feature sizing.

Len currently serves as a Subject Matter Expert for Witt O'Brien's in the USVI, where he has directed the assessment of the WAPA Water Distribution system and the VIWMA Wastewater Collection System

across the three primary islands in the territory. This work has generated more than \$8 billion in recovery funds for the territory.

TASK 12 – Training, Technical Assistance, and Capacity Building

We will establish a technical assistance plan that outlines the type and nature of training and advisory services to benefit building DCR's capacity in providing compliance, financial program/project management, and timely reporting. The plan will outline areas where virtual training would be most effective and be supplemented with on-site events where appropriate.

We will develop and provide the tools and templates that frame the structure to assist with compliant financial documentation and data, supporting the expected outputs and outcomes for reporting. Tools and templates will include application intake support documents, eligibility review assistance, and program interpretation resources to promote transparency, reporting, and accountability. Our SMEs will formulate training and technical assistance tailored to the gaps identified by technical assistance and subrecipient management and monitoring, for DCR staff, subrecipients, and partners.

We have been fully engaged with leadership and regional stakeholders nationwide to address their evolving capacity building needs. We are routinely selected to provide training and technical assistance at national association events, including those for the National League of Cities, Bloomberg e311, and the National Association of Counties, where we serve as a trusted partner.

We have provided a multi-tiered scope of capacity-building services to our clients—covering thousands of grantees and sub-grantees, as well as hundreds of thousands of direct and indirect beneficiaries. This includes project and program closeout services with audit-ready files, and staff augmentation to ensure their capacity to meet the needs of various programs. We are proud of the processes we have implemented to maximize not just equity of opportunity, but also equity of access to our programs.

STAFFING PLAN:

TASK 12 – Training, Technical Assistance, and Capacity Building		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Sarah Perry, MPPM	Management Consultant III	Project Support
Ingrid Ault	Management Consultant III	Project Support



Sarah Perry, MPPM. Sarah brings 18 years of experience in policy analysis, organizational and project leadership, and grants management capacity building. She supports procurement compliance and monitoring, manages large-scale grant projects, and assists municipalities with complete grant lifecycle projects, from grant pursuit through implementation to successful closeout.

- As a Research and Planning Analyst for the Eastern Municipal Water District, Sarah is providing grants compliance support and technical assistance regarding various funding sources, including ARPA SLFRF, EPA State and Tribal Assistance Grants, and the U.S. Bureau of Reclamation. She is analyzing labor compliance and providing support for various construction projects, including technical assistance and training, material development (such as contractor packets and tools for use/implementation), review of contractor (and subcontractor) payroll reports, and on-site wage interviews.
- As a Grants Management Capacity Building SME for the Bloomberg e311 and National League of Cities (NLC) Local Infrastructure Hub Initiative, Sarah designs and leads interactive classes and coaching sessions related to various Federal grant opportunities, including the IIJA's Digital Equity Act, the FRA's Rail Crossing Elimination and Consolidated Rail Infrastructure and Safety Improvements grant, and the DOT's Promoting Resilient Operations for Transformative, Efficient, and Cost-saving Transportation grant. These "boot camp"-style courses support municipalities in understanding how to develop competitive grant materials, implement grant funding, and develop long-term grant management capacity.



Ingrid Ault. Ingrid has 30 years of experience in grants research, application development, grants compliance, and risk management with expertise in community planning, housing, and economic development issues.

- As a Grants Pursuance Specialist for the North Carolina League of Municipalities, Ingrid manages grants pursuance and grants management support for 14 towns. She developed 12 grants totaling \$6.5 million, including grants for parks, SS4A, and public safety. Specifically, she developed a Park Strategy Plan to serve as a template for creating a process to establish a park board, implement land acquisition, and execute funding options as a long-term strategy.
- For multiple jurisdictions in Alabama, Ingrid has written 12 grants totaling \$28.5 million, including St Clair County's \$9.7 million Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant, a Railroad Crossing Elimination (RCE) grant for \$6.7 million for Trussville. She secured \$472,600 for the City of Opelika through the Alabama Historical Commission's Preservation of Alabama's Significant Sites (PASS) and a \$15,000 Norfolk Southern Match for a \$281,200 Safe Streets for All (SS4A) demonstration grant to implement a Railroad Technology Improvement system for the City of Alabaster. For St. Clair County, she led the development of the RAISE grant submission. For the City of Moody, she developed two grants for museum development for \$132k.

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

Witt O'Brien's has extensive experience managing the myriad requirements of federally funded programs. Specifically, our team has worked with clients to develop compliant relocation policies, procedures, and workflows in accordance with the HUD's URA. We understand HUD's requirements for timely notices, eligibility determinations, and documentation, and we have supported clients in creating relocation plans that comply with all relevant requirements.

Witt O'Brien's will assist DCR in developing and implementing its relocation program by 1) drafting policies, SOPs, and required notices; 2) designing eligibility and benefit determination tools; and 3) creating compliance monitoring and corrective action resources. We will also provide the technical guidance necessary to ensure that relocation program requirements are integrated into System of

Record (SOR) workflows, supporting reporting requirements. Witt O'Brien's will also prepare and deliver training for DCR staff, subrecipients, and partners to ensure consistency in URA requirements and overall program compliance.

STAFFING PLAN:

TASK 13 – Relocation Program (URA/TRA) Development and Compliance Support		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Michelle Little, MURP	Management Consultant IV	Project Support
Sandra Urban, CGMS	Management Consultant III	Project Support



Michelle Little, MURP. Michelle brings 17 years of experience in managing large, complex grants programs involving Federal funding sources, including over \$4 billion in CDBG-DR funding.

- As Project Manager, City of New Orleans Office of Community Development – Disaster Recovery Unit (OCD-DRU), she was responsible for the URA development and compliance for a major project involving the acquisition of land.
- She has conducted compliance support for URA/TRA during her tenure in New Orleans, New York City, and Moorehead City, NC.



Sandra Urban, CGMS. Sandra is a senior grants policy manager and Certified Grants Management Specialist with nearly 20 years of experience pursuing and managing federal grants for housing, community development, and emergency management programs.

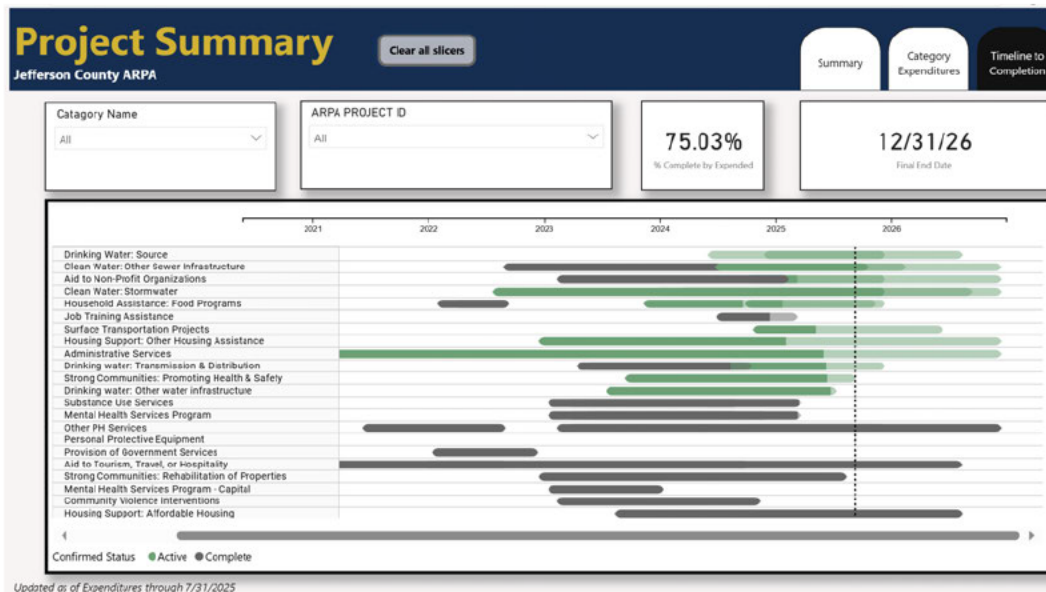
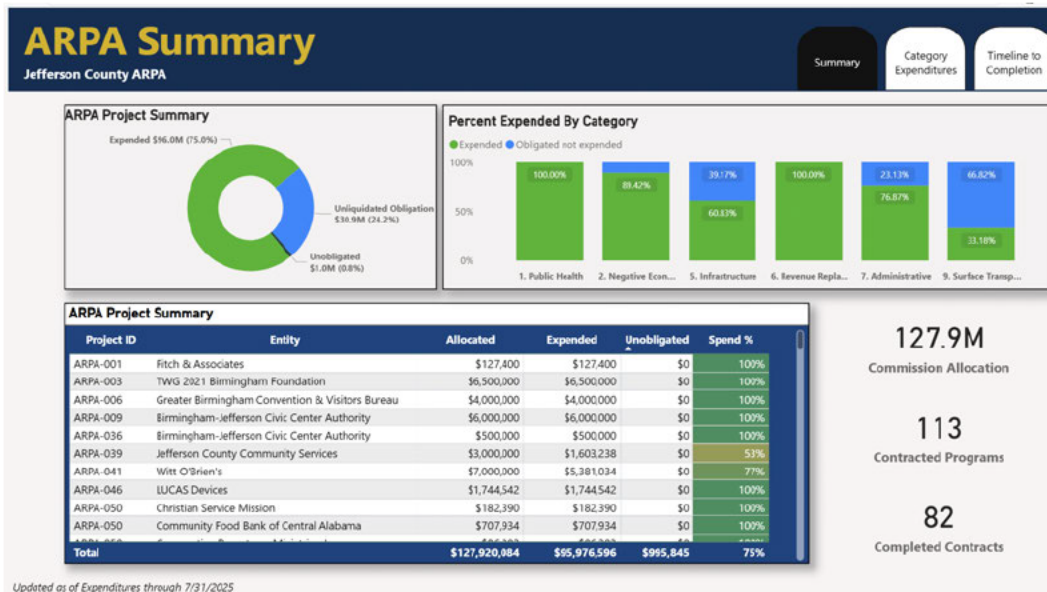
- As a Senior Grants Policy Manager for Harris County, TX, Sandra served as a team lead for multiple monitoring engagements for the County's ARPA program, focusing on ensuring the eligibility of affordable housing projects. These projects included the acquisition and preservation of single-family and multi-family housing properties. As part of the eligibility determination, Sandra provided subject matter expertise on the APRA Final Rule, 2 CFR 200, and federal cross-cutting requirements, including 49 CFR 24 (Uniform Relocation Assistance), to assist Harris County. Her attention to detail ensured that clients expended ARPA funds in accordance with federal regulations to ensure compliance.
- As a Senior Grants Policy Manager for the Louisville Metro Government (LMG), Louisville, Sandra provided support and guidance, which included assisting LMG and its subrecipients with guidance on eligibility and Uniform Relocation Assistance.

TASK 14 – Communication, Public Information, and Outreach Support

As part of our communications and outreach support, we will work closely with DCR, subrecipients, partners, and vendors to ensure clear, consistent, and compliant messaging throughout the CDBG-DR grant lifecycle. Our team will develop standardized templates for press releases, stakeholder notices, fact sheets, and FAQs to ensure alignment with HUD and state requirements, as well as correct branding and public information standards. We will produce outreach materials tailored to impacted communities, incorporating translation services, accessibility accommodations, and appropriate engagement strategies to ensure broad and equitable participation across your communities.

Witt O'Brien's has extensive experience supporting federally funded disaster recovery programs, where transparent communication and stakeholder engagement are crucial to the program's success. We have designed and facilitated public meetings, community workshops, and listening sessions that meet the citizen participation requirements outlined in CDBG regulations. Our team is skilled at preparing guidance documents, media protocols, and crisis communication frameworks to support DCR in managing public and media inquiries. Witt O'Brien's will combine technical expertise and proven engagement practices to help DCR maintain public trust and deliver recovery resources effectively to North Carolina communities.

Exhibit 10: Dashboard filtered to show Summary and Time to Completion



STAFFING PLAN:

TASK 14 – Communication, Public Information, and Outreach Support		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance

TASK 14 – Communication, Public Information, and Outreach Support

Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Anna Valdez, CGMS	Management Consultant IV	Project Support
Leah Russell	Management Consultant II	Project Support



Anna Valdez, CGMS. Anna has over 11 years of experience in expansive public sector knowledge, SaaS product development and enterprise implementation, people and budget management, and business process improvement..

- As the Technical Product Manager at Euna Solutions, she successfully managed coordination and communication within the project team, with management, and with all customers, including state and local governments.
- As the Senior Program and Performance Manager, State of Arizona, Executive Office of the Governor, Anna led the program team responsible for managing over \$2 billion in COVID-19 relief programs, resulting in the management and oversight of over 2,000 state-wide grantees. Her work required communication strategies with the grantee community, the public, and the highest levels within the state.



Leah Russell. Leah has over 7 years of experience in delivering grant management programs. Her expertise spans Federal and State Housing Funding, stakeholder outreach and communication programs, comprehensive knowledge of Federal Code of Regulations for grant management, and collaborative experiences with nonprofits, local education agencies, and state agencies.

- Developed and maintained **fact sheets, FAQs, and website content** to support public information efforts, drawing from experience preparing accessible resources for tenants and landlords during Washington's COVID-19 eviction moratorium.
- Authored **guidance documents to support consistent external messaging and branding**, leveraging experience in presenting complex federal grant program information to diverse audiences.
- Designed **communication protocols for crisis communication and public inquiries**, rooted in prior experience navigating sensitive public issues during emergency rental and eviction policy periods.
- Coordinated and facilitated **stakeholder engagement and outreach events**, modeled on prior in-person grant review sessions and grant bootcamp presentations.

TASK 15 – Grant Management

As grants management experts, we combine our knowledge of policy, regulation compliance, and administration to ensure program success and full allocation of your grant funding. For over 20 years, Witt O'Brien's and its legacy entities have provided grant management advisory services to enhance

the resilience of hundreds of communities nationwide. To date, we have helped clients maximize the use of more than \$75 billion in Federal funds.

Our Grant Management Lifecycle Services encompass post-award activities, including program assessment, internal controls support, monitoring, subrecipient management and oversight, data collection and reporting, invoice support, and record collection and retention, followed by closeout activities.

As an example of our expertise, since 2020, we have been fully engaged with King County to maximize the community benefits of FEMA, Coronavirus Relief Act, and ARPA funds, enabling a COVID-19 response and recovery. Initially, we conducted CARES Act After-Action Reviews/Assessments to evaluate the County's grant management responses to the initial COVID-19 public health pandemic. We recommended the deployment of an enterprise grants management solution, which the County agreed to and ultimately worked with us to select and implement. We assisted in establishing procedures, systems, and controls to mitigate future audit risk by ensuring compliance with relevant requirements. Since then, we have provided post-award grant management services for over \$1.374 billion in emergency, response, and recovery funding, addressing the impacts of the pandemic. Our support includes technical assistance and staff augmentation, training and capacity building, performance and compliance monitoring, as well as closeout and audit readiness services. A pre-audit assessment conducted by the Washington State Auditor's Office for FY 2020, 2021, and 2022 resulted in single audits that were clean of findings or recommendations for the program areas we supported.

STAFFING PLAN:

TASK 15 – Grant Management		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Katje Benoit, CGMS	Management Consultant II	Project Support
Sandra Urban	Management Consultant IV	Project Support



Katje Benoit, CGMS. Katje is a grants management professional experienced in administering federal and state funding programs, ensuring financial compliance, and supporting large-scale system implementations.

- Her experience includes managing over \$2 billion grant portfolio, overseeing more than 2,300 subrecipients and processing high volumes of payments while ensuring adherence to federal and state regulations.
- Katje also has experience managing multimillion-dollar statewide programs, reconciling grant payments, and driving process improvements, demonstrating her ability to strengthen financial oversight and optimize grant administration.



Sandra Urban, CGMS. Sandra is a senior grants policy manager and Certified Grants Management Specialist with nearly 20 years of experience pursuing and managing federal grants for housing, community development, and emergency management programs.

- As a Senior Grants Policy Manager for Harris County, TX, Sandra served as a team lead for multiple monitoring engagements for the County's ARPA program, focusing on ensuring the eligibility of affordable housing projects. These projects included the acquisition and preservation of single-family and multi-family housing properties. Her attention to detail ensured that clients expended ARPA funds in accordance with federal regulations to ensure compliance.
- As a Housing Administrator for the City of Palm Bay, Sandra was responsible for the full grant lifecycle and project management of more than \$8 million in various subcontracts for the City's CDBG, HOME Investment Partnership, NSP, and SHIP Programs, including programs for homeownership, emergency repairs, and homebuyer assistance. Her work was pivotal in transitioning the City's programs from noncompliance and years of withheld federal funding to compliance and the recovery of federal funds previously withheld due to the noncompliance of previous administrators.

TASK 16 – Technical Systems Specification & Project Management

Witt O'Brien's brings extensive project management expertise across federally funded programs, consistently supporting clients in the development and monitoring of grants and their required administrative systems. Our team has managed large-scale program workflows from design through implementation to ensure compliance with federal and state requirements and internal controls, primarily through the use of grant dashboards. For CDBG-DR, we recognize that the SOR must serve as the source of program data, supporting operations and HUD monitoring/audit requirements.

We will assist DCR in designing and detailing technical specifications for the SOR, including workflow mapping, data management protocols, and documentation specifications. We will prepare system specifications that support federal and state reporting requirements and incorporate internal quality control measures. Witt O'Brien's will provide project management and monitoring support to track system development progress, validate that deliverables align with program specifications, and confirm that the SOR supports compliance.

STAFFING PLAN:

TASK 16 – Technical Systems Specification & Project Management		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance
Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Anna Valdez, CGMS	Management Consultant IV	Project Support
Kailee Wolterstorff, CGMS	Management Consultant III	Project Support



Anna Valdez, CGMS. Anna has over 11 years of experience in expansive public sector knowledge, SaaS product development and enterprise implementation, people and budget management, and business process improvement..

- As the Technical Product Manager at Euna Solutions, she led the end-to-end product development lifecycle for eCivis' Grants Network grants management system, resulting in three major feature releases over six months. She also led the effort to develop new functionality, resulting in over \$700,000 in cost savings.
- As Deputy Grants Manager for the state of Arizona, Anna provided oversight of vendor management and product development for the enterprise State grants management solution, throughout the software development lifecycle, for 35 State agencies. She guided product decisions to identify, prioritize, and meet the needs of customers and end-users. Implementation included creating a project timeline, presenting the solution to executive-level leadership, creating onboarding documents and training curriculum for end-users, and troubleshooting product issues. She assisted with the implementation of Federal Uniform Guidance and the Federal Funding Accountability and Transparency Act (FFATA) reporting state-wide.



Kailee Wolterstorff, CGMS. Kailee brings a unique combination of expertise, with eight years of experience in grants research, application development, and monitoring grant funding for compliance.

- As a Senior Solutions Engineer—Grants for eCivis, Kailee managed the development of system specifications for local, tribal, county, and state governments to deliver moderate to complex grants management software solutions. She led the end-to-end solution architecture and implementation, conducting comprehensive technical assessments, needs analyses, and proof-of-concept exercises to validate proposed solutions.
- As the Solutions Engineer for the State of Rhode Island for 2 years, Kailee reviewed recommendations and roadmaps for proposed solutions, conducted design and proof-of-concept reports to validate proposed solution requests, offered technical leadership throughout the implementation, and advocated for process improvements and solution development for the state.

TASK 17 – Environmental Review

Environmental and Historic Preservation Review can encompass a wide range of compliance requirements and lead to significant delays in the award process if the appropriate focus and expertise are not utilized. Elements of this review include cross-referencing each project scope of work (SOW) against the Federal regulations, laws, and Executive Orders that may have an impact. These include:

- National Environmental Policy Act (NEPA)
- National Historical Preservation Act (NHPA)
- American Indian Religious Freedom Act of 1978 (AIRFA)
- Archeological and Historic Preservation Act of 1974 (AHPA)
- Archeological Resources Protection Act of 1979 (ARPA)
- Clean Air Act (CAA), 1990 as Amended
- Clean Water Act (CWA), 1948, as amended 1966, 1972, Section 10 Rivers & Harbors Act, 1899
- Coastal Zone Management Act (CZMA)

- Coastal Barriers Resources Act (CBRA)
- Endangered Species Act (ESA)
- Farmland Protection Act (FPA)
- Fish and Wildlife Coordination Act (FWCA)
- Native American Graves Protection and Repatriation Act of 1990 (NAGPRA)
- Resource Conservation and Recovery Act (RCRA)
- Wild and Scenic Rivers Act (WSRA)
- Wilderness Act (WA)
- Executive Order 11988: Floodplain Management, 1977
- Executive Order 11990: Protection of Wetlands, 1977
- Executive Order 12898: Environmental Justice for Low-Income & Minority Populations, 1994
- Executive Order 13007: Indian Sacred Sites, 1996
- Any relevant Executive Orders released in 2025

And any other Federal, state, and local legal and regulatory frameworks that govern the expenditure of Federal funds in your area. **We take the approach of resolving EHP issues programmatically whenever possible, as opposed to a project-by-project strategy, so that negotiations and documentation requirements necessary to achieve resolution have the broadest possible impact.**

Our experts have completed assessments of projects that have resulted in thousands of Categorical Exclusions (CATEXs) and over 500 FEMA Environmental Assessments (EAs). We have the experience and expertise to ensure your project can move through FEMA and the SHPO review swiftly and effectively, including scoping letters, endangered species lists, photographs, memos, maps, and related documentation in support of EHP reviews.

Our team has also supported municipal and state partners in navigating the NEPA process, including work with cities through the Bloomberg Local Infrastructure Hub and North Carolina League of Municipalities, where we completed environmental reviews for large-scale infrastructure projects. These efforts required coordination across multiple agencies, ensuring compliance with 24 CFR 58, and guiding local governments through the technical, regulatory, and procedural requirements to receive federal approvals for their projects.

We are well-versed in identifying the appropriate level of review, developing realistic completion timelines, and coordinating specialized studies as needed. Witt O'Brien's understands the importance of both compliance and efficiency, helping clients avoid unnecessary delays while maintaining the level of detail required for federally funded projects. Our expertise uniquely positions us to support DCR and its subrecipients and partners in completing environmental reviews and necessary documentation, while advancing the needed recovery projects efficiently.

STAFFING PLAN:

TASK 17 – Environmental Review		
Key Personnel	Title	Function
Vanessa Brower	Project Principal	Corporate support and oversight of contract compliance

TASK 17 – Environmental Review

Zabrina Gregg, PMP	Project Manager	Overall contract management to include assignment of personnel resources, schedule, and budget
Key Support Personnel		
Chelsea Morganti, CFM	Management Consultant IV	Project Support
Sandra Urban, MPA, CGMS	Management Consultant IV	Project Support



Chelsea Morganti, CFM. Chelsea is a CFM and holds a certificate for state and federal procurements. She brings 11 years of experience in mitigation grant management, community assistance, and program management and implementation, including needs assessments, market analyses, and the effective use of GIS tools and geospatial information.

- For the Nevada Department of Emergency Management, Chelsea provides technical assistance on hazard mitigation project application development to jurisdictions across the State of Nevada, which includes environmental reviews. She assists in the review and development of HMPs and Sub-grant applications for annual and disaster-related mitigation grants, including HMGP post-fire grants. She is also developing and delivering state-wide training for state staff and Sub-grantees to increase capabilities at all levels.
- As a Disaster Recovery Analyst, City of New Orleans, LA, Chelsea facilitated 383 FEMA conditionally approved demolition properties through the code enforcement, local historic, and FEMA Environmental and Historic Preservation processes. She advocated for legal judgments of 'blight' at hearings, in city council meetings, and at local, state, and federal coordination meetings. She created and managed databases to track over \$16 million in grants. She inspected damaged properties, identified historic elements for preservation, and oversaw safe remediation and salvage of residential and commercial demolitions.



Sandra Urban, MPA, CGMS. Sandra is a senior grants policy manager and Certified Grants Management Specialist with nearly 20 years of experience pursuing and managing federal grants for housing, community development, and emergency management programs.

- As a Housing Administrator for the City of Palm Bay, Sandra was trusted with all environmental review records, such as environmental assessments and categorically excluded subject to (Part 85).
- As a Contract Administrator/Staff Specialist IV for the Brevard County Board of County Commissioners, Viera, FL, Sandra managed more than \$12 million in various federal contracts and subcontracts from beginning to end, including proposal preparation, file documentation and management, financial records, and closeout. Sandra was responsible for all environmental review records, such as categorically excluded subject to (Part 85), for the NSP.

4.3 PROGRAM MANAGEMENT SYSTEMS

Quality Assurance and Quality Control

We weave quality into every aspect of our projects, ensuring that our deliverables and services consistently meet the highest standards. Our project managers lead quality management, but it is the job of all project team members, including subcontractors.

Our PMP addresses translating project quality requirements or standards into executable activities that can be implemented within the project. Each of our five project lifecycle phases (Initiate, Plan, Execute, Monitor and Control, and Closeout) addresses quality management as one of the key aspects of managing our projects.

Our documented project management processes outline the establishment and documentation of quality requirements for a project, as well as the project team's implementation of these requirements in our project work. This increases the likelihood of meeting the quality objectives of our projects, identifying the root causes of poor quality or ineffective processes, and assuring the DCR that the deliverables will meet all contractual requirements.

Our approach to quality management for DCR is also grounded in our four-phase, ISO 9001–based quality system that includes:

- **Plan** – We ensure the right people, processes, and tools for establishing quality standards are utilized, tailored to your specific needs.
- **Execute** – We capture and report on performance and contract metrics, providing you with transparent and timely updates.
- **Review** – We monitor and analyze technical, schedule, and cost performance, ensuring that your objectives are being met efficiently and effectively.
- **Improve** – We capture and use lessons learned in ensuring quality and enhancing performance, continuously improving our service delivery to you.

Our project teams proactively identify issues and take prompt corrective actions. Our quality objectives for deliverables and services provided under DCR's contract will include:

- **Accuracy** – Deliverables will be accurate in technical content and adhere to accepted elements of style, meeting the high standards of DCR.
- **Clarity** – Deliverables will be clear, concise, and all diagrams will be easy to understand and relevant, ensuring that DCR can easily interpret and utilize the information provided.
- **Context** – Deliverables will take into consideration the audience, purpose, and the circumstances applicable to DCR.
- **Compliance with Approved Schedule** – Deliverables shall be submitted on or before the due date specified, respecting the timelines set by DCR.
- **Content Completeness** – Deliverables shall address all the requirements described in the SOW, ensuring that DCR's needs are fully met.



- **Professional Interaction** – Our personnel will be professional in their interaction with each other, DCR staff, and other staff in a manner that fosters a positive, productive work environment. We are committed to maintaining a strong, collaborative relationship with you.

Other features of our quality management approach to improving DCR service delivery and deliverables include:

- Creating an awareness among our project team of the quality requirements and how they are executed, as documented in the project's PMP.
- Periodic quality reminders and training for our staff.
- Periodic performance audits to ensure quality requirements are being adhered to and the results/deliverables are meeting stated objectives.
- Use of a peer review process for each deliverable before submission to DCR. In the peer review process, project team members other than the author(s) are assigned to review a deliverable and identify issues associated with the quality objectives listed above.

In instances where we identify an issue with quality or receive feedback from DCR that a service or deliverable does not meet the contract requirements, we take action based on that feedback. For non-conformities, we will conduct a root-cause analysis to identify the underlying reason for the quality issue. We will develop corrective action(s) to eliminate the problem and prevent it from recurring. Depending on the specific non-conformity, corrective action may include changes to the process, enhancements to tools, and/or additional staff training. All corrective actions are communicated to the appropriate project team members and monitored continuously to ensure they are having the intended effect. The impact and effectiveness of corrective actions are reviewed and evaluated over time, and improvements are made, as necessary, to ensure project delivery meets or exceeds our DCRs' stated quality objectives.

4.4 STAFF CAPACITY

Our staff brings decades of experience as practitioners of CDBG-DR programs, including developing, writing, supporting, and implementing Action Plans for CDBG-DR, CDBG-MIT, and CDBG Entitlement Funding—with minimal edits and comments from HUD.

Our knowledge and experience at the funding agency level, as well as our State agency perspective, will translate into a more efficient and effective team that understands policy, compliance, and processes—a partner that will help the County successfully deliver this project.

As identified in Sections 4.5 and 5 below, we have extensive internal capacity to support the tasks proposed under this proposal. Additionally, we have a bench of over 300 SMEs, which includes experts in various fields such as CDBG-DR, housing, grants, compliance, labor compliance, finance, fraud, engineering, infrastructure, and environmental services, that can be leveraged to support the contract as needed. Given the breadth and depth of resources and our resource utilization tools described in Section 4.2.2 above, we have the flexibility to scale quickly for any short- or long-term assignment.

4.5 STAFF ORGANIZATION

Exhibit 11: Staffing Organization across all Task Areas

TASK	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Proposed Personnel	Policy Devel.	Financial Comp.	DOB Comp.	Proc. Comp.	Claims & Appeals	Action Plan Devel.	Needs Assmt.	Program Perfor. Monitoring	Civil Rights, Fair Housing, and Other Related Issues	Audit Readiness	Engr. Support	Capacity Building	URA/TRA	Stakeholder Comm.	Grant Mgmt.	Project Mgmt.	Enviro. Review
Key Personnel																	
Vanessa Brower	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Zabrina Minor-Gregg, MBA, PMP	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Key Support Personnel																	
Michelle Little, MURP	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Karen Patterson	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●
Tara Vogelien, MSc, MBA, CFE	●	●		●	●		●	●		●		●		●	●	●	●
Brenda Locke	●	●	●	●	●		●	●		●		●		●	●	●	
Anna Valdez, CGMS	●	●	●		●		●	●		●		●		●	●	●	
Zulma Perez	●	●	●	●	●		●	●	●	●		●		●	●	●	
Sarah Perry, MPPM	●	●		●	●		●	●	●	●		●		●	●	●	
Sandra Urban, MPA, CGMS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Reg Givens	●	●		●	●		●	●	●	●		●		●	●	●	
Tessa Brooks	●	●			●		●	●		●		●		●	●	●	
Chelsea Morganti, CFM	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●
Daniel Petrelli, MUPD	●	●		●	●	●	●	●	●	●		●		●	●	●	●

TASK	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Proposed Personnel	Policy Devel.	Financial Comp.	DOB Comp.	Proc. Comp.	Claims & Appeals	Action Plan Devel.	Needs Assmt.	Program Perfor. Monitoring	Civil Rights, Fair Housing, and Other Related Issues	Audit Readiness	Engr. Support	Capacity Building	URA/TRA	Stakeholder Comm.	Grant Mgmt.	Project Mgmt.	Enviro. Review
Kailee Wolterstorff, MA, CGMS	●	●			●		●	●		●		●		●	●	●	
Emily Camp, PMP	●	●	●	●	●		●	●	●	●		●	●	●	●	●	
Allison Byrne	●	●		●	●		●	●	●	●		●		●	●	●	
Sandeep Singh, PMP, CCM	●	●		●	●		●	●		●	●	●		●	●	●	
Len Wright, PhD, PE, D.WRE	●			●			●	●			●	●		●	●	●	
Ingrid Ault, MURP	●	●		●	●		●	●		●		●		●	●	●	●
Leah Russell	●	●			●	●	●	●	●	●		●	●	●	●	●	
Katje Benoit, PMP	●	●		●	●		●	●		●		●		●	●	●	
Additional Staff Support Personnel																	
Regina Vega Hutchinson	●	●	●	●	●		●	●	●	●	●	●		●	●	●	
Emily Winburn, PhD, GPC (NC)	●	●			●		●	●		●		●		●	●	●	
Jeff Wray	●	●	●	●	●		●	●	●	●		●		●	●	●	
Angela Whitesell	●	●		●	●		●	●	●	●		●		●	●	●	
Casey Fuller	●	●		●	●		●	●		●		●		●	●	●	
Charles Gray (NC)	●	●		●	●		●	●	●	●		●		●	●	●	
Jen Colton (NC)	●	●		●	●		●	●		●		●		●	●	●	
Jennifer Bumgarner (NC)	●	●		●	●		●	●		●		●		●	●	●	
Loretta Wallace	●	●		●	●	●	●	●	●	●		●		●	●	●	
Tanya Rivers	●	●		●	●	●	●	●	●	●		●		●	●	●	

TASK	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Proposed Personnel	Policy Devel.	Financial Comp.	DOB Comp.	Proc. Comp.	Claims & Appeals	Action Plan Devel.	Needs Assmt.	Program Perfor. Monitoring	Civil Rights, Fair Housing, and Other Related Issues	Audit Readiness	Engr. Support	Capacity Building	URA/TRA	Stakeholder Comm.	Grant Mgmt.	Project Mgmt.	Enviro. Review
Katie Harwood, MA	●	●	●	●	●	●	●	●		●	●	●		●	●	●	●
Colin Vissering, MCP, CFM, AICP	●	●	●	●	●	●	●	●		●	●	●		●	●	●	●
Holly Mittel, PMP, CFM	●	●	●	●	●	●	●	●		●		●		●	●	●	●
John Connolly, PE	●	●		●			●	●			●	●		●	●	●	●
Rebecca O'Connor, PE	●	●		●	●		●	●		●	●	●		●	●	●	●

5. RESUMES AND BIOS

Per response to Question 179 of Addendum 1, resumes of the key personnel are presented in the following order:

- Vanessa Brower – Project Principal
- Zabrina Minor Greg, PMP, MBA – Project Manager
- Michelle Little, MURP
- Karen Patterson
- Tara Vogelien, MSc, CFE
- Brenda Locke
- Anna Valdez, CGMS
- Zulma Perez
- Sarah Perry, MPPM
- Reginald Givens
- Tessa Brooks
- Chelsea Morganti, CFM
- Dan Petrelli, MUPD
- Kailee Wolterstorff, CGMS
- Emily Camp, MPA, PMP
- Allison Byrne
- Sandeep Singh, PMP, CCM
- Len Wright, Ph.D, PE
- Ingrid Ault, MURP
- Leah Russell
- Katje Benoit, CGMS

Vanessa has over 30 years of experience managing complex disaster recovery projects in the public, non-profit, and private sectors focusing on housing and community recovery.

Vanessa has developed program policies, procedures, and successful implementation strategies for complex recovery efforts across the U.S. including in Alabama, Florida, Louisiana, Mississippi, New York, Pennsylvania, Texas, and Washington.

Since joining Witt O'Brien's, Vanessa has provided U.S. Housing and Urban Development (HUD) Community Development Block Grant – Disaster Recovery (CDBG-DR) support for the U.S. Virgin Islands (USVI); St. Charles County, Missouri; and the Town of Morehead City, North Carolina. She has managed several COVID-19-related grants management programs, including King County's (WA) \$1.39 billion-funded programs.

Before joining Witt O'Brien's, Vanessa worked for several private sector firms—including her own consulting firm—supporting significant programs including New York State CDBG-DR recovery programs; the New York City Housing Recovery Office; Harris County and Galveston, Texas; housing disaster recovery; and the Louisiana Road Home Small Rental Property Program. She also has experience as a Technical Assistance Contractor (TAC) managing FEMA funding and long-term community recovery planning following numerous disaster events nationwide.

Vanessa has expertise in leveraging multiple complex funding requirements to determine cross-cutting compliance. She has provided organizational capacity building to private; non-profit; and public sectors, mainly focusing on quality assurance/quality control, forensic analysis, financial investigation, compliance, and monitoring.

VANESSA BROWER

PROJECT PRINCIPAL



YEARS OF EXPERIENCE

30 Years

EDUCATION

BS, Accounting, Central Washington University

Senior Project Manager, St. Charles County Government, St. Charles, MO (2023 – Present)

Witt O'Brien's supports the St. Charles County Department of Community Development, by conducting all program, design, and implementation services necessary to mobilize/launch the comprehensive CDBG-DR Local Voluntary Buyout Program and reduce long-term community risk. We provide grant management services to operate the County's Buyout Program in accordance with the State of Missouri's Action Plan and HUD requirements.

Engagement Manager, Town of Morehead City, NC (2023 – Present)

Witt O'Brien's is providing the Town with grant management and administration services related to implementing housing projects in conformance with the HUD-approved State of North Carolina Hurricane Florence CDBG-DR Action Plan and subrecipient agreement between the North Carolina Office of Recovery and Resiliency and the Town of Morehead City.

Project Liaison, California Department of Housing and Community Development, Sacramento, CA (2023 – 2025)

As Project Liaison, Vanessa is managing the ERAP compliance assessment for 37 subawards for the 2021 period of performance.

Senior Project Manager, Sonoma County, CA (2022 – Present)

Witt O'Brien's is providing annual compliance monitoring for each subrecipient to ensure compliance with American Rescue Plan Act (ARPA) requirements and provide technical assistance as needed. We

also provide capacity building training to local community-based organizations and County staff to build their foundation to apply for and administer future Federal funding opportunities.

ARPA Senior Technical Advisor, Sonoma County, CA (2022 – Present)

Vanessa is managing the County's subrecipient monitoring for 25 allocations of ARPA awards to 28 distinct programs, which includes training, technical assistance, and capacity building to the County and its community partners.

ARPA Senior Technical Advisor, City of Wichita, KS (2022 – Present)

As Senior Technical Advisor, Vanessa manages the subrecipient monitoring for 22 ARPA awards allocations including training, technical assistance, and capacity building to the City regarding Uniform Guidance 2 CFR 200 and related requirements.

Project Manager/Subject Matter Expert (SME), King County, WA (2020 – Present)

Vanessa serves as Senior Project Manager and SME. She manages the team supporting King County's \$1.35 billion Coronavirus Relief Fund, ARPA, and FEMA awards following COVID-19, which involved grant management as well as eligibility reviews, monitoring and closeout of expenditures, and the leveraging of other funding to ensure maximum resource utilization. The King County Single Audit resulted in no findings or recommendations of the funds managed by Witt O'Brien's for prior periods. The 2023 audit is underway and likely also has no findings of funds managed by Witt O'Brien's. To meet the County's needs, Witt O'Brien's provided the right resources at the right time, with as few as four staff and as many as 42 staff actively working on tasks in any given week.

SME CDBG-DR, HUD Action Plan Technical Assistance (2019 – 2020)

Vanessa provided technical assistance in formulating and delivering CDBG-DR Action Plans for various clients.

CDBG-DR SME, USVI (2019)

Vanessa was the CDBG-DR SME for Witt O'Brien's comprehensive disaster recovery support for USVI following back-to-back hurricanes Irma and Maria in 2017. Vanessa helped develop policies and procedures, a HUD action plan, and reporting for CDBG-DR funding.

Contract Project Manager/SME, New York State Disaster Recovery Programs, NY (2013 – 2020)

Vanessa served as a CDBG-DR SME, providing design and implementation services for three disaster recovery programs established with CDBG-DR funds: Superstorm Sandy (2012), Hurricane Irene (2011), and Tropical Storm Lee (2011). Following Superstorm Sandy, she designed and implemented the System of Record for the New York Rising Governor's Office of Storm Recovery. This System of Record, powered by IntelliGrants Agate Software, was funded with CDBG-DR for eight housing disaster recovery programs supporting the workflow of over 40,000 applications for homeowners and renters. This project involved managing the \$3 billion budget and developing program policy, software systems, operations, and program delivery.

FEMA Contract SME, New York City Housing Recovery Office, NY (2013)

Vanessa served as a technical specialist for FEMA, leading the program design and implementation of CDBG-DR funding for the New York City Housing Recovery Office. She developed the initial action plan for program policy, operations, and program delivery. She developed a cross-cutting programmatic policy to prevent duplication of benefits, misuse, mismanagement, and abuse of Federal funds.

Contract Project Manager, Luzerne County, PA (2012 – 2020)

Vanessa provided design and implementation services of disaster recovery programs funded with CDBG-DR monies related to Hurricane Irene and Tropical Storm Lee for Luzerne County, PA's \$26 million budget. Residential and Commercial Property Acquisition Redevelopment and Buyout converting to open space.

Project Manager, HUD CDBG/HOME Technical Assistance (2012 – 2013)

Vanessa conducted HUD risk and compliance assessments of at-risk participating jurisdictions, evaluating conformance and performance to CDBG and HOME regulatory requirements. One CPD Capacity Needs assessment was a joint project with the National Center on Family Homelessness and Home Base CCC.

TAC IV, FEMA Long-Term Community Recovery Planning, Harrisburg, PA (2011 – 2013)

As a TAC contractor, Vanessa provided technical assistance to the FEMA Community Recovery Planning effort under the National Disaster Recovery Framework. Her responsibilities included scoping; developing; and documenting housing, economic, and infrastructure projects to repair and rebuild communities. She also served as a technical specialist for program design and implementation of CDBG-DR funding following Superstorm Sandy (DR-4085) in New York and Hurricanes Irene and Lee (4030-DR and 4025-DR) in Pennsylvania. She was a technical contributor to developing a CDBG-DR playbook for the Regional Catastrophic Planning Team covering parts of Connecticut, New Jersey, New York, and Pennsylvania.

CDBG-DR Contract Project Manager, Housing Disaster Recovery Programs of Harris County & City of Galveston, TX (2009 – 2010)

Following Hurricane Ike, Vanessa provided design and implementation services for housing disaster recovery programs funded with CDBG-DR, including the design and administration workflow, award calculation, and fiscal systems powered by IntelliGrants Agate software. With a \$216 million budget of CDBG-DR funding, Vanessa managed this grant program of nearly 3,700 applicants. Vanessa developed and managed program policy, software systems, operations, and program delivery with over 130 employees.

FEMA Contractor Operations Lead, Beaumont and Houston, TX (2008 – 2009)

Following Hurricane Ike (DR-1791), Vanessa was the Contractor Operations Lead for FEMA funding. She provided strategic planning for disaster recovery from Hurricane Ike and economic, infrastructure, and housing support.

Road Home Small Rental Property Program Director, Louisiana Office of Community Development, Baton Rouge, LA (2006 – 2008)

Vanessa served as Program Director for the Road Home Small Rental Property Program. In this role, she was responsible for all aspects involving the design, development, and implementation of the Small Rental Property Program for the State of Louisiana with an \$869 million project budget. She worked very closely with the Office of Community Development and state-elected officials to create a HUD CDBG-funded incentive program for small-scale residential rental property owners who, in return, offered units to very-low low-income tenants affected by Hurricanes Katrina and Rita. She managed 17,000+ applications processed in 13 targeted parishes and managed program policy, software systems, operations, and program delivery with responsibility for 200+ employees.

FEMA TAC, Jackson and Biloxi, MS (2005 – 2006)

As a FEMA TAC IV following Hurricane Katrina (DR-1604), Vanessa was engaged in strategic planning efforts for Long-Term Community Recovery planning and economic, infrastructure, and housing support.

FEMA TAC, Escambia, Charlotte, Santa Rosa, and Hardee Counties, FL (2004 – 2005)

Vanessa was deployed to Florida to implement ESF-14 FEMA Long-Term Community Recovery Planning to the counties of Escambia, Charlotte, Santa Rosa, and Hardee.

Zabrina is a grants management specialist with more than 15 years of experience in community housing programs, crisis communications, public relations, strategic planning, and government relations.

Zabrina is a Director of Grants and Policy in Witt O'Brien's Community Services Practice and a certified Project Management Professional (PMP). She is an expert manager who has worked with community housing, people experiencing homelessness, and non-profits focused on housing for the low-income population. Since joining Witt O'Brien's in 2021, she has provided local government agencies with program leadership and technical expertise for end-to-end grants management support, including grants application writing and administration, for ARPA (SLFRF and ERAP) and the IIJA/BIL.

She holds a NeighborWorks Professional Certificate in Affordable Housing Funding and Finance and Community Development Block Grant (CDBG) Program Certification among her training and certifications. She is a U.S. Housing and Urban Development (HUD)-certified Housing Counselor.

Project Manager, North Carolina League of Municipalities (2024 – present)

Zabrina has managed the project supporting 50 individual municipalities with tailored one-on-one technical assistance and to date, advising a team that has submitted more than 40 grant applications ranging in size from \$1,000 to more than \$14 million, bringing millions of dollars of grant awards to North Carolina Municipalities.

Project Manager, St. Clair Economic Development Commission (EDC), Alabama (2023 – present)

Zabrina has worked with the EDC and the 10 municipalities to complete a grants needs assessment, and grants readiness assessment; then secure funding to increase the capacity of the municipal governments to receive and comply with federal grants.

Project Manager, Grants Management, Multiple Cities, AL (2023 – Present)

Zabrina leads the team providing end-to-end grants management support for ARPA and IIJA projects for the Alabama Cities of Opelika, Alabaster, Moody, and Trussville.

Technical Advisor, National League of Cities (NLC) and Bloomberg (2023 – Present)

Zabrina is responsible for providing technical content and presenting training to cities on Federal grant management and compliance as part of the NLC Local Infrastructure Hub and Bloomberg Infrastructure boot camp series.

ZABRINA MINOR GREGG, MBA, PMP

PROJECT MANAGER



YEARS OF EXPERIENCE

16 Years

EDUCATION

MBA, University of Tennessee - Knoxville

BA, Sociology, University of Tennessee – Knoxville

Professional Grant Writer, University of Tennessee Post-Professional Program

CERTIFICATIONS / TRAINING

Project Management Professional (PMP), No. 567499, Project Management Institute, 2023

Housing Counselor, USHUD, 2020

Tax Increment Financing and Payment In Lieu of Taxes, UT Center for Industrial Services, 2019

Professional Certificate in Affordable Housing and Finance; CDBG Program Certification, Neighborworks, 2018 - 2019

Public Housing Management Certification, Nan McKay and Associates, Inc., 2016

Certified Lead Based Paint Inspector

Certified in Suicide Prevention

Technical Advisor, City of Hoover, AL (2022 – Present)

Zabrina provides grants management advisory services and ensures federal compliance with an \$8 million ARPA allocation to the City of Hoover.

Project Manager, Jefferson County, AL (2021 – Present)

Zabrina manages and oversees the end-to-end grants compliance of a \$126 million ARPA and an \$80 million ERA Program allocation. Her responsibilities include pre-award, post-award, and close-out activities.

Policy Advisor, U.S. Health and Human Services (HHS), Washington, DC (2021 – Present)

Zabrina provides technical and policy input for HHS revisions to their Federal grants policy statement and grants policy administration manual for both internal and external users.

Grants Specialist, Rhode Island Commerce Corporation, Providence, RI (2021 – 2022)

Zabrina developed, managed, and oversaw the Rhode Island Rebound small business grant program, which awarded over \$20 million to small business grantees. She was also responsible for monitoring and auditing cases.

Fiscal Program Lead, King County, WA (2021)

As Fiscal Program Lead for the County's \$390 million Eviction Prevention and ERA Program, Zabrina designed an enterprise-scale database system to process more than 20,000 applications for rental assistance and manage records and information for local Community-Based Organizations to do this work.

Executive Director and Designate, Community Housing Partnership, Franklin, TN (2019 – 2020)

For the Community Housing Partnership, Zabrina ensured compliance with HUD procurement and federal Continuum of Care grant guidelines for the 19-county Continuum of Care Program. During the pandemic, she managed multiple construction projects for more than 40 single-family and multi-family units and managed 43 low-income rental units, including capital improvements. She managed operations of more than \$1.2 million, \$1 million of which were federal grant funds. She also participated in multiple federal homeless programs focused on data collection under federal regulatory requirements.

Deputy Director, Oak Ridge Housing Authority (ORHA), TN (2016 – 2019)

Zabrina managed major Capital Fund projects, ensuring procurement compliance and compliance with HUD requirements. She completed HUD-required reports and prepared reports for the Board of Commissioners. She managed accounts receivable and accounts payable and was responsible for rent collections. Zabrina worked closely with the tenants to address challenges and resolve issues.

Chief Development Officer, Tennessee Valley Coalition for People Experiencing Homelessness, Tennessee Valley Authority, TN (2015 – 2016)

Zabrina managed several programs, including an Emergency Solutions Grant HUD program and the HUD-funded Homeless Management Information System Database. She created and maintained the training curriculum. She managed the staff, AmeriCorps staff, and those supporting the HUD/VA-funded Supportive Services for Veteran Families Program. She collaborated on three major HUD grants that were funded, as well as various state and local grants.

Executive Director and Founder, Trinity Outreach Center of Hope (2012 – 2015)

Zabrina founded a start-up non-profit to address the needs of the impoverished and homeless in the Anderson County area. As its Executive Director, she recruited 25 staffers and volunteers to obtain essential resources, food, clothing, and shelter, helping over 171 individuals get housing in 2013. She strategically partnered with the local Continuum of Care to mainstream social services to facilitate access to mainstream social services.

Family Self-Sufficiency Coordinator, Oak Ridge Housing Authority, TN (2011 – 2013)

Zabrina managed a caseload of 36 families, counseling them on the benefits of home ownership and creditworthiness and connecting them to community resources. She also used her grant writing expertise to secure funds to support the organization.

Michelle brings 17 years of experience in managing large, complex Federal grants programs, with a focus on compliance and quality assurance.

Michelle manages grant programs involving Federal funding sources, including COVID-19 and the U.S. Housing and Urban Development's (HUD) Community Development Block Grant – Disaster Recovery (CDBG-DR) funding. Specifically, she has led more than a dozen teams managing programs administering more than \$1 billion in COVID-19 funding, specifically CRF and ARPA. She has also been the firm's SME in developing new procedures for grants administration—including compliance monitoring, risk management, audits, closeout, and Davis-Bacon compliance—which have been used practice-wide and implemented by numerous clients. Additionally, she supports clients in grants pursuance, establishing grants program organizations, identifying funding opportunities, and writing applications.

Before joining Witt O'Brien's, she served as the Compliance and Monitoring Department Head for the New York City Mayor's Office of Management and Budget (OMB), ensuring compliance for more than \$4.2 billion in CDBG-DR funding following Hurricane Sandy. She was also a Project Manager for the City of New Orleans, securing and administering \$88 million in capital projects for the Office of Community Development – Disaster Recovery Unit. Michelle held several other positions in the New Orleans area in the aftermath of Hurricanes Katrina, Rita, Gustav, Ike, and Isaac.

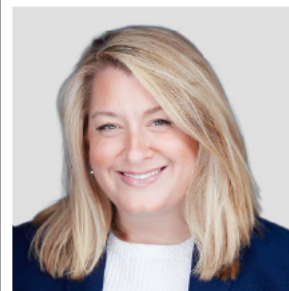
Project Manager, West Central Arkansas Planning and Development District (2024 – Present)

Michelle provides guidance and technical assistance on Workforce Innovation and Opportunity Act (WIOA) funding and overall Federal compliance. She leads a team responsible for programmatic and financial monitoring services for workforce development programs supporting both youth and adults, particularly dislocated workers.

Project Manager, Eastern Municipal Water District (EMWD), Perris, CA (2023 – Present)

Michelle is leading a team providing grants compliance support and technical assistance regarding various funding sources, including ARPA SLFRF, EPA State and Tribal Assistance Grants, and U.S. Bureau of Reclamation funding. The team has provided labor compliance and monitoring support for various construction projects—including technical assistance and training, material development (including contractor packets and tools for use/implementation), review of contractor (and subcontractor) payroll reports, and on-site wage interviews. They also completed a procurement analysis for the EMWD.

MICHELLE LITTLE, MURP
MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

17 Years

EDUCATION

Master of Urban and Regional Planning (MURP), University of New Orleans

BS, Geography, University of Central Arkansas

Certificate, Project Management, Rutgers University

PROFESSIONAL AFFILIATIONS

Member, SoCal Water Grants Network

Compliance Specialist, Kansas Department of Commerce (DOC), Topeka, KS (2023 – Present)

For the Kansas DOC management of SLFRF grants, Michelle develops special conditions related to awardee applications and eligibility and leads a team for monitoring and closeout. Michelle also provides technical assistance related to SLFRF funding.

ARPA Compliance Specialist, Wichita, KS (2023 – Present)

Michelle is assisting the City's ARPA program by ensuring eligibility for City-designed programs and providing additional technical assistance on SLFRF and Uniform Guidance 2 CFR 200.

Project Manager, City of Richmond, CA (2023 – Present)

Michelle has led the effort to develop the City's ARPA program to distribute more than \$22 million in ARPA funds, including developing and reviewing subaward applications. Ongoing technical assistance includes eligibility reviews; subrecipient risk assessment, monitoring, and management; closeout support; supporting single-audit proceedings; ensuring compliance with ARPA requirements; and supporting Federal financial performance, and compliance reports.

CDBG-DR Grants Specialist, Town of Morehead City, NC (2023 – Present)

For the City's HUD CDBG-DR grants program, Michelle provides technical assistance and policy review for compliance with CDBG-DR program, Section 3, and Davis-Bacon requirements.

Training Lead, California Office of Planning and Research (OPR), CA (2023)

Michelle led the development of a four-part training webinar series for Cal OPR to support the State's efforts to help government entities in California navigate Federal funding opportunities. Training sessions covered current grant management hot topics including Title VI Civil Rights Compliance; Maximizing Federal Funds: ARPA and Bipartisan Infrastructure Law (BIL); ARPA Grant Implementation: Administrative, Indirect, and Direct Costs; and ARPA Compliance Supplement Addendum.

Project Manager, Metropolitan Water District (MWD) of Southern California, CA (2022 – Present)

Michelle led an assessment of MWD's grants management organization and processes, which included recommendations for program design and capacity building. She then assisted MWD in standing up an organization capable of grants pursuance and administration, including policies and procedures and training and professional development. MWD then expanded the firm's scope of work to include grant research, pursuance, and management of their various Federal, State, and local funding opportunities.

Grants Specialist, Various Clients (2022 – 2023)

For various client ARPA programs (SLFRF funding), Michelle developed technical assistance materials and training related to program eligibility, subrecipient and contractor monitoring, Section 3 and Davis-Bacon Act, risk reduction, uniform guidance application, and closeout. Clients included Jefferson County (AL); Louisville (KY); and Sonoma County (CA).

Grants Subject Matter Expert (SME), Bloomberg/National League of Cities [NLC] (2021 – Present)

For Bloomberg 311, Michelle provided technical expertise related to ARPA and Uniform Guidance; for Bloomberg/National League of Cities NLC, she served as a technical SME on IIJA/BIL railroad and transportation opportunities.

Project Manager, Harris County, TX (2021 – 2024)

Michelle led the compliance effort for Harris County's \$915 million ARPA SLFRF award. She established the compliance team and provided technical assistance, including developing a compliance dashboard, performing eligibility assessments, and assessing risk; she also developed compliance and subrecipient monitoring plans, tailored monitoring plans, and closeout plans. She also provided training to Harris County departments and their subrecipients.

Compliance and Monitoring Lead, King County, WA (2020 – Present)

Michelle is the Compliance Lead for the King County COVID-19 (CRF and ARPA) grant program, overseeing and leading a team responsible for compliance monitoring of over 200 subrecipients and 1,500 contracts.

Compliance and Monitoring Unit Head, NYC Mayor's OMB – CDBG-DR Task Force, New York, NY (2014 – 2020)

Michelle established the Department and function at OMB. As Compliance and Monitoring Unit Head, Michelle was responsible for ensuring compliance with the \$4.2 billion received after Hurricane Sandy for business, housing, infrastructure, and resiliency projects. She oversaw internal and external engagements, including monitoring engagements by HUD and audits by the Office of the Inspector General (OIG).

Project Manager, City of New Orleans Office of Community Development – Disaster Recovery Unit (OCD-DRU), New Orleans, LA (2010 – 2014)

As Project Manager, Michelle secured and administered \$88 million (primarily CDBG-DR) in capital projects, including streetscape and roadway improvement, planning, land acquisition, streetlight repair, and landscaping for OCD-DRU.

Grants Manager, Louisiana Solutions, New Orleans, LA (2009 – 2010)

As Grants Manager and Junior Planner, Michelle was responsible for 37 streetscape and roadway improvements, land acquisitions, and planning projects. She was also responsible for analyzing census and beneficiary data, urban planning, and GIS.

Planning Assistant, City of Kenner, LA (2007 – 2009)

Michelle was a planning assistant for the University of New Orleans on loan to the City of Kenner and was responsible for grant writing and management, land use and master planning, zoning, and GIS.

Karen is a community development and housing specialist with 40 years of professional experience, including nearly 20 years managing large, complex Federally funded disaster recovery and housing grant programs.

As a thought leader and program design specialist, Karen assists state, local, and territorial governments with the development and implementation of streamlined and compliant programs using U.S. Housing and Urban Development (HUD) and COVID-19 related Federal funding streams.

Since joining the firm, she has guided both USVI and Puerto Rico Electric Power Authority (PREPA) in leveraging CDBG-DR and CDBG-MIT funding for recovery from Hurricanes Irma and Maria recovery activities. Specifically, she led the development of the USVI \$1.8 billion CDBG-DR Action Plan and program guidelines for the USVI housing rehabilitation, multi-family development, public housing, infrastructure, and economic revitalization programs territory-wide. She has also provided technical assistance for eligibility reviews, subrecipient monitoring, procurement compliance, and closeout for COVID-19 related grant funded programs.

Prior to joining Witt O'Brien's, she was a Section Chief at California's Department of Housing and Community Development, responsible for oversight and management of agency funded programs. She was responsible for program implementation of the State's annual HUD allocations, as well as the \$230 million Neighborhood Stabilization Program (NSP), making an acute and timely impact for households affected by the housing and financial crisis.

Prior to her 14-year tenure with a state housing agency, Karen honed her financial acumen in the mortgage industry where her career began. She has more than 20 years of mortgage lending experience with the last 15 years of those as an operations manager in large lending organizations.

Grants Management Compliance Specialist, Sonoma County, CA (2023 – Present)

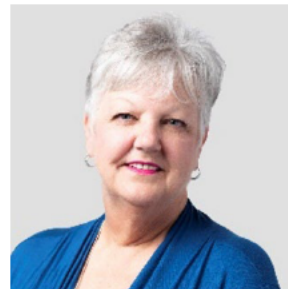
Karen has been supporting development of training for subrecipients on Uniform Guidance and internal controls; prevention of fraud, waste, and abuse; financial management and separation of duties; allowable uses, costs, and program delivery; suspension and debarment; and procurement and debarment.

Community Development Block Grant – Disaster Recovery (CDBG-DR), Subject Matter Expert (SME), Puerto Rico Electric Power Authority (PREPA), San Juan, PR (2023 – Present)

Karen is part of the Witt O'Brien's team assisting PREPA in using Federal funding (FEMA Public Assistance and Hazard Mitigation Grant Program funding and Community Development Block Grant – Disaster Recovery [CDBG-DR] funding) to support repair of the Puerto Rico power system. As the project's CDBG-DR SME, Karen provides guidance on using the HUD disaster funds in conjunction with FEMA programs.

KAREN PATTERSON

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

39 Years

EDUCATION AND TRAINING

IBM Management Training program

California Manager Training

Grants Management Specialist, Sedgwick County, KS (2020 - 2021)

For the County's COVID-19 grants programs, Karen led a team in all phases of Federal grant management, including providing guidance on program design, conducting project eligibility reviews, providing training on procurement compliance, assisting with documentation for payroll eligibility, providing subrecipient training on closeout, and supporting closeout activities.

Grants Management Specialist, King County, WA (2020 - 2021)

Karen was part of the Witt O'Brien's team providing post-award grant management, audit, and closeout support for King County's \$1.3+B COVID-19 grant programs. Karen supported the development of policies and procedures, including a fraud handbook and best practice for payment methods.

Project Manager, Minnesota Housing Finance Authority (MHFA), MN (2021)

Karen was the Project Manager of Witt O'Brien's team of over 150 personnel, supporting Minnesota's successful \$289 million Emergency Rental Assistance (ERA) Program. In addition to providing program design feedback, overall management, application, and payment processing service management, Karen also assisted the State of Minnesota as they created their online ERA Program grant portal.

Grants Management Specialist, Various Counties in the State of KS (2020 – 2021)

Karen provided grants management support to counties across Kansas, including Franklin, Geary, Shawnee, Riley, Rooks, Kingman, Graham, and Johnson. She provided technical assistance on program design, subrecipient and contractor management, conducted beneficiary eligibility reviews, determinations for reimbursement payment, and program and project closeouts.

CDBG-DR Expert, Disaster Recovery, U.S. Virgin Islands (USVI) Housing Finance Authority (VIHFA), St. Thomas, USVI (2019 – 2021)

Karen supported the Witt O'Brien's disaster recovery effort in the US Virgin Islands, which included assisting with the effort to plan and manage approximately \$1.8 billion in HUD CDBG-DR funds for Housing, Infrastructure, and Economic Revitalization projects throughout the territory. She engaged in planning, program design, program management, compliance, policy, environmental, and financial management. She made key contributions to the CDBG-DR program by assisting VIHFA with program design and implementation technical documents, policies, and procedures, and by providing training and technical assistance.

Section Chief, Grant Management Section, California Department of Housing and Community Development (DHCD), Sacramento, CA (2007 – 2019)

Karen ended her tenure at CA DHCD as the Chief of the State's Grant Management Section. In this position, she administered the federal and state CDBG-DR programs (exclusive of the HOME Program's multi-family housing development activities). She started her 12-year career at CA DHCD as the manager of the State's \$230 million NSP where she managed program development and implementation and the NSP award of \$155 million. She was responsible for managing the state's National Disaster Resiliency Competition award of over \$70 million. Since beginning with the CDBG-DR program, the State successfully expended over \$230 million NSP grant and program income funds, making a significant impact for households affected by the financial crisis. Karen also served as a trainer for the Council of State Community Development Agencies, delivering CDBG training courses from 2016 through 2018.

Tara is a management consultant with more than 20 years of experience in project management, federal grants fund management, and business operations.

Tara has been supporting state and local government agencies with design and implementation of Federally funded programs—such as the U.S. Health and Human Services Provider Relief Fund and the U.S. Treasury's Coronavirus Relief Fund (CRF), Emergency Rental Assistance (ERA), and American Rescue Plan Act (ARPA) — focused on assisting with overcoming the short-term and long-term impacts of COVID-19. She assists state and local government clients with expedient but compliant development of streamlined COVID-19-related grants programs with a focus on economic revitalization, housing and food security, local community organization partnerships, and public health/social services support initiatives.

For more than 10 years, she served as the Director for Business and Research Administration at Plants for Human Health Institute, a North Carolina State University-based research and education organization. In this role, she provided expertise on finance, operations, contracts, and research administration. She also has experience managing large environmental remediation contracts.

Fiscal Lead, King County, WA (2021 – Present)

Tara is the current Fiscal Lead for the King County ERA program. Her work includes day-to-day fiscal operations management; beneficiary and contractor management; accounting; and revenue oversight for the ERA programs. Tara compiles and submits all federal reporting required for the program, Single Audit Report (SEFA) Reporting, and serves as the direct liaison for third party audits and Federal Single Audits.

Senior Grants Management Specialist, Wichita, KS, and Sonoma County, CA (2023 – Present)

For these two ARPA programs, Tara designs performance metrics, collects performance data, applies appropriate analytical methodologies and visualization techniques to evaluate grant / program performance for governments, associated subrecipient monitoring, compliance, and fiscal activities. Tara also develops project-specific Power BI, Power Query, and Dashboard tools for effective fund management and program reporting.

Senior Grants Management Specialist, Jefferson County, AL (2023 – Present)

Tara provides ongoing reconciliation support for Jefferson County's ERA program that includes confirming beneficiary payments, subrecipient reconciliation, banking data review, and federal reporting. She performs data research to apply appropriate analytical methodologies and summarizes findings for eligibility of expenditures utilizing funds.

TARA VOGELIEN, MSc, MBA, CFE, CRA

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

23 Years

EDUCATION

MBA, Executive Program, Concentration in Healthcare Administration, East Carolina University

MS, Toxicology, Concentration in Environmental and Mammalian Physiology, University of Georgia

BS, Environmental Science and Economic Policy, Concentration in Statistical Analysis, NC State University

CERTIFICATIONS

Certified Fraud Examiner, (CFE) Association of Certified Fraud Examiners

Certified Research Administrator (CRA) Research Administration Certification Council

Senior Grants Management Specialist, Louisville Metro Government (LMG), Louisville, KY (2023)

Tara provided surge reconciliation for \$70 million+ in ERA reconciliation and closeout support for the LMG and subrecipients. This included General Ledger reconciliation, beneficiary payment review for all payments between Pass Thru, ERA1 and ERA2 beneficiaries across multiple FAIN and funding sources.

Senior Grants Management Specialist, King County, WA (2021 – 2022)

For the King County CRF and ARPA programs, Tara developed associated grant documentation to stand up and closeout programs including subrecipient agreements, grant agreements, performance reporting, subrecipient monitoring strategies and closeout checklists.

Management Consultant, University of North Carolina at Pembroke, NC (2020 – 2021)

Tara guided and assisted faculty and staff principal investigators with post-award administration of externally funded grants. She provided support to the Grants Accountant in the Controller's Office reviewing and reconciling financial expenditures and oversaw and managed budgetary and regulatory aspects of the sponsored activities portfolio.

Director for Business and Research Administration, Plants for Human Health Institute (PHHI), Kannapolis, NC (2007 – 2019)

Tara developed and maintained infrastructure and services to monitor, promote, and improve the Institute's research. She coordinated research activities with the North Carolina Research Campus partners while working with Principal Investigators to make modifications to improve the success of research projects. She represented the Institute, its investigators, and its administration with internal and external research offices and agencies (i.e., University, state, and Federal offices and agencies).

Tara led and co-led efforts to seek funding opportunities to support significant program initiatives and other major research efforts. She conducted internal assessments and applied quality improvement principles to increase effectiveness for the Institute's internal processes and support mechanisms. Tara directed and oversaw operations to assure investigators and the Institute followed all University, state, Federal, and other research policies. She was responsible for the Institute's operation for pre-award and post-award administrative support by coordinating proposal development, negotiating terms, budgeting, research account management, financial compliance, and reporting. Tara directed staff and activities to support development efforts and conduct research. She managed operational aspects of the Institute, NC State Faculty House, and Greenhouse Facilities at the NC Research Campus.

Program Director/Federal Contract Manager, ESA Environmental Specialists (2004 – 2007)

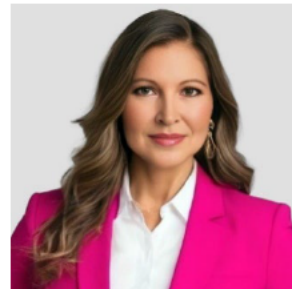
Tara was responsible for controlled cash flow, budgeting, and operations for multi-million-dollar environmental government contracts. She consulted on sales and management practices, compile and submit proposals, and prepare and present information papers and briefings for the command groups and regulatory agencies. As the Program Director she worked on government contracts at military installations including Pentagon, Fort Polk, Fort Bragg, Former Naval Air Station Cecil Field, Ellsworth Air Force Base, and various satellite contracts for the U.S. Environmental Protection Agency regarding private property environmental remediation. Providing oversight of environmental projects nationally, Tara's work included leadership in strategic planning for regulatory compliance of environmental laws including the Resource Conservation and Recovery Act, Comprehensive Environmental Response, Compensation, and Liability Act, Clean Water Act and Clean Air Act with a working knowledge of 29 CFR, 13 CFR, and 40 CFR for business practices.

Brenda has nearly 30 years of experience in fiscal management and accounting, including the entire lifecycle of grants management.

Since joining Witt O'Brien's in 2021, Brenda has supported grants management and compliance efforts for CARES CRF, ARPA SLFRF, FEMA PA, and other COVID-19-funded programs. Through this work, she has played a crucial role in supporting client efforts to ensure consistency in processes and procedures in areas such as policies, procedures, work instructions, quality plans, documentation, and record keeping.

Brenda previously served in various executive and management accounting roles in the non-profit, public accounting, construction, and manufacturing industries across Florida. She was responsible for developing and managing \$50 million in Federal and state economic development grants for the Space Coast Economic Development Commission. Other previous support includes managing risk and fraud activity, ensuring compliance with industry standards and regulations, and working with internal and external auditors on year-end and interim audits.

BRENDA LOCKE
MANAGEMENT CONSULTANT
IV



YEARS OF EXPERIENCE

28 years

EDUCATION

BSB, Accounting, University of Phoenix

AAS, Accounting, Southwest Georgia Technical College

Subrecipient Monitor, California Department of Housing and Community Development, Sacramento, CA (2024 – Present)

Brenda is part of the Witt O'Brien's team conducting a compliance assessment of the State's \$1 billion+ Emergency Rental Assistance (ERA) Programs (ERA1 and ERA 2) for fiscal year 2021. She conducts sample selections for the 37 subrecipients of the program and performs compliance and conformance testing on a sample of subrecipients.

Grants Policy & Compliance SME, Kansas Department for Aging and Disability Services (KDADS) (2023 – Present)

Brenda assists KDADS with the \$66 million ARPA-funded expansion of statewide health and behavioral health services to close service gaps in the continuum of care through investment in health facility infrastructure and/or programs to expand innovative care models and treatment, as well as efforts that will lead to workforce expansion. The competitive grant program funded facility development, renovation, and targeted program expansions impacting service and workforce capacity in the health and behavioral health sectors. The grant programs address statewide health and behavioral health service shortages with long-term impact via expansion of facilities and near-term impact via innovative care models and treatment.

Lead Fiscal and Compliance Advisor/SME, Jefferson County, AL (2022 – Present)

Brenda has been responsible for the fiscal and compliance management of all of Jefferson County's ARPA-funded SLFRF and ERA Programs and projects totaling \$187 million, including full life cycle grant and subrecipient management, compliance, monitoring, reporting, and closeout.

Lead Fiscal Advisor, King County, WA (2021 – 2023)

Brenda oversaw the fiscal management of King County's COVID-19 programs with multiple funding sources, including King County general fund, CARES CRF, ARPA SLFRF, and FEMA PA funding. These programs included over 60 subrecipients and numerous locations, spending over \$40 million. During

this time, she facilitated program fiscal management across multiple divisions to conceptualize, develop, and implement strategies, systems, standards, and plans for fiscal and budgetary functions for COVID-19 programs. She supported the client in using funds, compliance, billing, and reporting, as well as managing program-level budgets and preparing budget revisions as necessary. She trained client staff and awardees to ensure compliance and understanding of CRF requirements; developed and designed supplemental appropriation requests as needed; assisted contracts & procurement with RFP/RFA templates and contract template development for ARPA SLFRF-funded programs. She also supported the 2021 year-end close, Schedule of Expenditure of Federal Awards (SEFA)/Simplified Supervisory Formula Approach (SSFA) reconciliation, preparation, submission, and audits of SLFRF-funded programs.

Founder and Chief Executive Officer (CEO), Strategic Business Partners Group, Inc., Melbourne, FL (2018 – 2021)

Brenda founded and managed Strategic Business Partners Group, Inc. as a business consulting firm specializing in strategic growth, capital markets, & government relations. She helped clients plan, coordinate, and execute cross-functional projects, including execution of the project deliverables, communications with the project team, staffing requirements, job planning, scheduling, and client meetings. As part of her responsibilities, she assisted client services through quality, efficiency, identification, and delivery of value-added services, including business process optimization.

Senior Manager Finance & Operations, Economic Development Commission (EDC) of Florida's Space Coast, FL (2014 – 2018)

Through the EDC, Brevard County manages all economic development grants for the County as well as Florida Space Coast assets. Brenda was responsible for planning, coordinating, executing, and monitoring the annual operating budget of \$3-\$5 million, including analyzing and presenting financial reports. She worked directly with the State Governor's office and State EDC and wrote and submitted Federal, State, and regional grant requests, including funding from Florida Department of Transportation and Florida Department of Commerce for infrastructure improvements, workforce development, and business revitalization. She completed file reviews for compliance and led the annual audit process, liaising with external auditors and the finance council of the board of directors and assessing any changes necessary. All audits were given an unqualified opinion.

CEO/CFO HME Providers, Inc., Titusville, FL (2010 – 2014)

As CFO for seven diverse companies under the parent company umbrella, Brenda was responsible for directing, planning, organizing, and preparing monthly financial statements. She was subsequently promoted to CEO of the software division, helping to rebrand the company as Eocene Health Systems, including creating all marketing materials, website development, and branding.

Staff Accountant, James Moore & Co., Gainesville, FL (2009 – 2010)

Brenda served as a staff accountant in audit and valuation assignments. She directed, planned, organized, and implemented software systems for clients across various business types.

Interim Controller, The Ronco Group-RHI, St. Augustine, FL (2008 – 2009)

As Interim Controller, Brenda directed, planned, organized, and prepared monthly financial statements for multiple business units, including consolidated financial statements. She identified and resolved accounting and system fraud activity utilizing forensic accounting techniques. She also anticipated and identified business issues (including performance gaps, opportunities, and emerging needs) for senior management and developed appropriate action plans to maximize business profitability.

Anna has over 11 years of experience in expansive public sector knowledge, SaaS product development and enterprise implementation, people and budget management, and business process improvement.

Anna has deep expertise navigating Federal and state regulations and processes including grants, vendor, and budgetary management with executive-level communications. She is customer-centric and focused on innovating at the nexus of government and technology.

Grant Specialist – Community Services, Public Policy, Grants Management and Compliance, Witt O'Brien's (2024 – Present)

Anna recently joined Witt O'Brien's as a Grant Specialist focusing on community services, public policy, grants management, and compliance.

Project Director, Grants, Euna Solutions, Multiple Clients (2023 – 2024)

Anna was responsible for working with cross-functional teams to define, communicate, and execute the business strategy and vision for the Euna grants portfolio. She collaborated on technical and business assessments of product rebuilds in alignment with customer needs and competitive offerings and created a go-to-market strategy for long-term viability of grants management system offerings. She collaborated closely with the executive leadership team, software engineering, marketing, and the sales team to ensure seamless product delivery and alignment with business objectives. She nurtured key stakeholder relationships with executive public sector customers, partners, and internal resources to drive collaboration and product success. Anna conducted market research, FOIA requests, and analysis to identify market opportunities, customer needs, and the evolving competitive landscape.

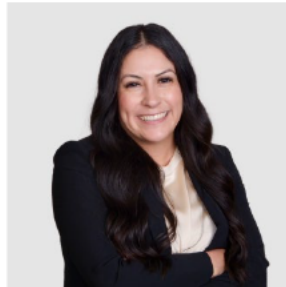
Technical Product Manager, Euna Solutions, Multiple Clients (2022 – 2023)

Anna led the end-to-end product development lifecycle for eCivis' Grants Network grants management system, resulting in three major feature releases over a six-month period. She also led the effort to develop new functionality that resulted in over \$700,000 in cost savings. Her proven ability to bridge the gap between technical teams, business objectives, and client needs resulted in successful product launches and customer satisfaction. She managed the product roadmap, prioritized features and enhancements based on market research, customer feedback, and internal and external contractual obligations and business needs. Anna orchestrated successful product launches with cross-functional teams including coordinating marketing efforts, messaging, and go-to market strategies; coordinated learning and adoption, customer success and implementation trainings, and requirements from each team for successful product launches and feedback loops.

Senior Solutions Architect, Euna Solutions, Multiple Clients (2021 – 2022)

Anna supported the sales team in performing customized product demonstrations for potential city, county, and State government clients that resulted in over \$1.1 million in sales over a one-year period. She led product development and analyzed and prioritized feature enhancements/requests within the

ANNA VALDEZ, CGMS
MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

11 Years

EDUCATION

MA, Criminal Justice, Arizona State University

BS, Criminal Justice and Criminology, Arizona State University

CERTIFICATIONS

Certified Grants Management Specialist (CGMS), National Grants Management Association; 2021

Certified Scrum Product Owner, Scrum Alliance; 2023

backlog based on value to clients and ROI, while keeping stakeholders informed of prioritization decisions and estimated delivery timelines. She utilized her grants management expertise and experience to guide key product development enhancements, resulting in the creation of Jira epics, tickets, and stories selected for development.

Anna ensured product development tickets were built in compliance with Federal regulations and business requirements. For complex State enterprise deals, she led Request for Proposal (RFP)/Request for Information (RFI) responses, completed functional requirement documents, and created an implementation plan based on customers' outlined requirements. She led discovery sessions with key enterprise customers to develop product requirements. Once requirements were gathered, she wrote business requirements and technical specifications and created wireframes/mockups. She also partnered with key internal stakeholders for product development tickets.

Senior Program and Performance Manager, State of Arizona, Executive Office of the Governor, Phoenix, AZ (2020 – 2021)

Anna led the program team responsible for managing over \$2 billion in COVID-19 relief programs resulting in the management and oversight of over 2,000 state-wide grantees. She provided program management expertise to the Economic Recovery Management Team, while leading a team of three grant management analysts. She built and delivered executive-level presentations communicating strategy, expectations, and processes for managing COVID-19 relief funding. Over a three-year period with the State, she led product management efforts in delivering a grants management system with their contracted vendor, eCivis, for the State's enterprise grants solution. She supported Arizona's response to and recovery from COVID-19 through the administration of CARES Act and other Federally covered funding. Implemented new policies and procedures related to Federal and State grant management to facilitate awarding of COVID-19 relief dollars, including programs across the education, housing, healthcare, and small business domain.

Anna built and managed application intake, review, and award processing, ensuring a fair and complaint process, as well as post-award training sessions for statewide grant programs. On average, she processed 150 applications per week through the award cycle over a six-month period. Oversight and processing included pre-award through post-award activities. She worked with Governor's Office executives and C-suite executives across 10 agencies to manage stakeholder engagements with consultants and cross-agency collaboration projects for statewide grant programs. She guided software product development of the State's enterprise grants management solution, eCivis, based on interaction with State agencies and stakeholders' input.

Anna provided support for product development that resulted in ten sprint deployments. She created user acceptance testing stories; and tracked, managed, and troubleshooted product issues. Partnered closely with internal and external stakeholders to balance scope and functionality prioritization of product rollouts. She also managed five State agency onboarding implementations, including process mapping, internal and external user training, and troubleshooting product issues.

Deputy Grants Administrator, State of Arizona Department of Administration, Phoenix, AZ (2018 – 2020)

Anna oversaw and managed \$20 million in state-wide programs on an annual basis, including revamping the 9-1-1 program, and led agency-wide process improvement initiatives and workstreams to achieve critical program objectives. She managed a staff of program managers to execute program and project performance delivery. She developed and executed a new grant program model for the State 9-1-1 program, totaling \$18.4 million in awards each year; program model included implementation of data-driven decisions, financial analysis and design, standardization of processes,

and yearly management of 18 grantees. She assisted with vendor management for three vendors that provided 9-1-1 services in Arizona. She also assisted with implementation planning for Text-to-9-1-1 capability at 86 9-1-1 operating centers.

Anna provided oversight of vendor management and product development for the enterprise State grants management solution, throughout the software development lifecycle, for 35 State agencies. She guided product decisions to identify, prioritize, and meet customer/end-user needs. Implementation included creating a project timeline, presenting the solution to executive-level leadership, creating onboarding documents and training curriculum for end-users, and troubleshooting product issues. She assisted with implementation of Federal Uniform Guidance and the Federal Funding Accountability and Transparency Act (FFATA) reporting statewide.

Program Manager, State of Arizona Department of Administration, Phoenix, AZ (2018)

Anna provided program management oversight to the Office of Grants and Federal Resources statewide grant programs, including Project Safe Neighborhoods, the State Energy Program, and the Arizona 9-1-1 program. Oversight included management of over \$20 million annually, in Federal and State funding. Utilized her grants management knowledge to implement standard work and processes for programs. She collaborated with the Office of Continuous Improvement (OCI) to identify process improvement opportunities for the newly assigned State 9-1-1 program. She reduced staff time dedicated to processing 9-1-1 program invoices by 50% from 40 hours a week to 20 hours a week within three months. Anna developed and delivered training curriculum, implementation schedules, onboarding documents, and other technology resources for system users of the State's enterprise SaaS grants management solution. She provided program management expertise for the State Energy Program, including streamlining the application process, reviewing statewide applications for assistance, and serving as the point of contact on a national level.

Program Coordinator, Arizona Criminal Justice Commission, Phoenix, AZ (2015 – 2018)

Anna provided technical assistance to over 50 subrecipients, totaling \$12 million in Federal and State grant funds. Oversight included: Federal and State program compliance, project management of deliverables and timelines, programmatic monitoring, and coordinating statewide stakeholder meetings. She successfully obtained over \$3 million in competitive Federal grants for eight different projects. She served as the primary system design source for internal agency technical projects, which created a streamlined MSSQL back-end architecture with a front-end web entry format for stakeholder reporting purposes. The system increased the efficiency of creating annual and periodic grant-related reports and reduced staff time by 30%. She hosted training sessions for internal and external stakeholders, on the new reporting system. Anna served as agency point of contact in the pilot program for a new statewide grants management system including requirements gathering, testing, deployment/implementation, and post-validation of the SaaS product to fit the agency's needs. She also recruited, interviewed, and managed interns on a semester basis for the Drug, Gang, and Violent Crime Control Program.

Investigative Aide, Maricopa County Office of the Legal Defender, Phoenix, AZ (2013 – 2015)

Anna assisted the lead investigator in case management duties including field investigations, evidence inventory, witness interviews, composing administrative and investigative reports, and collecting various in-state/out-of-state public, private, and government records. She effectively managed a caseload of approximately 250-300 criminal, juvenile dependency, and capital criminal cases per year. She established and was responsible for a new process to lead investigations for all cases originating in the Early Disposition Court and Regional Criminal Court for an average caseload of 500 cases per year.

Zulma Perez brings over 12 years of specialized expertise in grant compliance and consulting, with a strong focus on project management, compliance research, and the development of audit programs.

Throughout her career, she has consistently delivered successful outcomes across diverse projects, demonstrating a deep proficiency in creating efficient and user-friendly grant management templates, providing effective subrecipient support, and leading comprehensive monitoring initiatives that drive organizational success and mitigate risk. Her extensive knowledge spans the interpretation and application of complex federal, state, and local regulations, ensuring full compliance with evolving guidelines and industry standards. Zulma's ability to navigate intricate regulatory frameworks allows her to provide invaluable insights and solutions, reducing the risk of non-compliance and ensuring smooth project execution.

Zulma excels in delivering tailored technical assistance to clients, empowering them with the expertise to effectively manage and administer grants. She is also adept at developing training materials and workshops that equip teams with the tools and knowledge to navigate the complexities of grant management with confidence and precision. By fostering close collaboration with clients, Zulma enhances business practices, streamline operations, and crafts customized policies and procedures that not only align with regulatory requirements but also address the unique goals and needs of each organization. Her approach is focused on fostering sustainable improvements, empowering organizations to achieve optimal results while ensuring long-term compliance.

Senior Project Manager, Witt O'Brien's, Houston, TX (2024 – Present)

- Puerto Rico Office of Management and Budget, Puerto Rico Broadband Office – BEAD Consulting
- State of Utah BEAD Initiative and Digital Equity – Grants Management Software Implementation
- Kansas Office of Broadband Development – Grants Management
- Jefferson County, AL – ARPA Grants Consulting

Grant Compliance Manager, Moss Adams, LLP, Houston, TX (2020 – 2024)

Zulma conducted project management and oversight, such as performing research of compliance requirements for federal, state, and grant-specific projects. She was responsible for developing compliance audit work programs, budgets, and schedules. She provided consistent grant management templates such as sub-award agreements, sub-recipient budgets, and financial reporting and invoices. Zulma oversaw and performed subrecipient setup and support procedures including conducting preliminary risk assessments, providing technical assistance and guidance, and developing training materials.

Zulma applied her technical knowledge of federal state, and local government grants administration and compliance to provide support to governments, non-profit entities and tribes, and other community-based organizations proposing on and receiving federal and other grant funding. She interprets, analyzes, and applies federal, state, local, and private guidelines including but not limited to

ZULMA PEREZ

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

12 Years

EDUCATION

BBA, Business Administration,
Accounting, Texas Southern
University

CERTIFICATIONS

Certified Internal Auditor (CIA), The
Institute of Internal Auditors

Patient Administration Specialist,
Health Information, Medical Records
Administration, United States Army

federal Uniform Guidance and/or agency-specific requirements for Department of Housing and Urban Development (HUD), Federal Emergency Management Agency (FEMA), Department of Energy (DoE), and U.S. Treasury grant and proposal specific terms and conditions, and institutional policy. She performed substantive tests of internal controls and audits with an emphasis on operational and financial audits to identify and resolve accounting or reporting issues according to Sarbanes-Oxley Act (SOX) compliance.

Auditor III, Calpine, Houston, TX (2020)

Zulma performed substantive tests of internal controls and audits with an emphasis on operational and financial audits to identify and resolve accounting or reporting issues. She evaluated business processes, procedures, policies and internal controls to identify root cause of deficiencies. She performed data analytics resulting in comprehensive complex analysis, dashboard report and exception reporting. Zulma collaborated with clients to provide reporting of internal controls and audit testing, which included preparing comprehensive reports of results and recommendations, as well as recommended corrective actions.

Process Risk and Controls Supervisor, RSM US LLP, Houston, TX (2019 – 2020)

Zulma coordinated audit of all required financial statements, related disclosures, and other client deliverables ensuring high-quality, on-time deliverables. She developed a deep understanding of the client businesses and industries to identify performance improvement opportunities. She identified and communicated accounting and auditing matters to key stakeholders. Zulma supervised audit engagement teams through performance of substantive testing and documentation of internal controls systems. She assessed risks and application of client internal control structure, including the identification of accounting and reporting issues.

Senior Internal Auditor, AMB Industries, Houston, TX (2014 – 2019)

Zulma led the execution of internal audits, including the supervision and review of team deliverables. She supervised and reviewed audit work to determine the reliability, accuracy, completeness, and timeliness of financial reporting. She tested internal controls in Human Resources, Payroll, Tax and Purchases and Payables, GL Accounting, tracked deficiencies and remediation work to ensure that controls operated effectively. She documented and communicated audit findings, deviations, adjustments, improvement in internal controls, opportunities for efficiencies, cost reduction, and/or quality improvement. She prepared audit reports conducted meetings and other written communication to leadership.

Zulma maintained web-based databases (Protiviti) used for document storage, status reporting, and other tracking purposes. She liaised with KPMG auditors to arrange SOX planning sessions, lead walkthroughs, discuss and document deficiencies/findings, remediation's and facilitate the integrated audit approach. She identified key controls, assessed controls for design deficiencies, and updated process within the Governance Portal. She participated in the implementation of new processes and corrective action plans to ensure SOX compliance

Sarah brings 18 years of experience in policy analysis, organizational and project leadership, and grants management capacity building, including recent support for COVID-19 funding programs and the IIJA/BIL.

Habla Español

Since joining Witt O'Brien's, Sarah has been supporting Federal grants management including COVID-19 funds and the IIJA. She manages large scale grant projects and supports municipalities with full grant lifecycle projects from grant pursuance, through implementation, and to successful closeout. Prior to joining Witt O'Brien's, Sarah led research efforts related to education and workforce to make recommendations on investments to bolster Pennsylvania's innovation economy, which supported the publication of Pennsylvania's first Innovation Economy Dashboard. Sarah has experience growing teams and projects across diverse subject areas. She is also fluent in Spanish both the written language and personal and professional conversation.

Grants Management Analyst, West Central Arkansas Planning and Development District (2024 – Present)

Sarah is leading a team providing programmatic and financial monitoring services for workforce development programs funded by the Workforce Innovation and Opportunity Act (WIOA). She supports the Planning and Development District in meeting State and Federal compliance requirements, while providing guidance in opportunities for system growth and modernization. Sarah regularly attends board meetings to give status updates and highlight project insights.

Grants Management Analyst, Jefferson County, AL (2023 – Present)

Sarah supports COVID-19 grants management program for Jefferson County, which includes a \$126 million ARPA and an \$80 million ERA allocation. For Jefferson County's ERA program, Sarah leads a team to manage all aspects of the program including subrecipient and vendor management, staff onboarding, technology implementation, financial reconciliation, and Federal reporting. Sarah is responsible for documenting all program policies and procedures and overseeing process implementation across staff and stakeholders. This includes the development and implementation of a user guide for the Neighborly platform, which is used to track and monitor all direct assistance disbursed through the ERA program. Sarah communicates to the County's executive leadership, including identifying program risks and mitigation strategies, and manages project resources.

Research and Planning Analyst, Eastern Municipal Water District, Perris, CA (2023 – Present)

Sarah is providing grants compliance support and technical assistance regarding various funding sources, including ARPA SLFRF, EPA State and Tribal Assistance Grants, and U.S. Bureau of Reclamation. She is analyzing labor compliance and monitoring support for various construction projects—including technical assistance and training, material development (including contractor packets and tools for use/implementation), review of contractor (and subcontractor) payroll reports and on-site wage interviews. She also completed a procurement analysis.

SARAH PERRY, MPPM MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

18 Years

EDUCATION

MS, Public Policy & Management,
Carnegie Mellon University

BA, Literature and Spanish, American
University

LANGUAGES

Spanish, Bilingual

SKILLS

Salesforce

Neighborly

Microsoft Excel

Microsoft Office Suite

ArcGIS Pro and Insights

Grants Management Analyst, Richmond, CA (2023 – Present)

Sarah has been providing ARPA compliance to the City of Richmond for the \$27.7 million in funding received to support recovery from COVID-19. She works across City departments to provide technical assistance, contract compliance support, and financial tracking. She provides regular project status updates to City leaders, including opportunities and strategies for risk mitigation.

Eligibility and Program Lead, Harris County, TX (2021 – 2023)

As Eligibility and Program Lead, Sarah supports Harris County with the management of \$915 million in COVID-19 funds from ARPA. She manages a team of project owners to complete eligibility reviews and collect pre-award documentation for ARPA-funded projects in four portfolio areas: jobs and education, safety and justice, housing, and health. Sarah also provides subrecipient monitoring support and technical assistance related to purchasing procedures and tracking administrative expenses.

Grants Management Capacity Building Subject Matter Expert (SME), Bloomberg e311 and National League of Cities (NLC) Local Infrastructure Hub Initiative (2021 – Present)

As an SME for the National League of Cities Local Infrastructure Hub Initiative, Sarah designs and leads interactive classes and coaching sessions related to various Federal grant opportunities, including the IJA's Digital Equity Act, the FRA's Rail Crossing Elimination and Consolidated Rail Infrastructure and Safety Improvements grant, and the DOT's Promoting Resilient Operations for Transformative, Efficient, and Cost-saving Transportation grant. These "boot camp"-style courses support municipalities in understanding how to develop competitive grant materials, implement grant funding, and develop long-term grants management capacity.

State Innovation Report Writer/Researcher, Pennsylvania Department of Economic and Community Development, Harrisburg, PA (2021)

Sarah led research related to education and workforce, including the development of data visualizations and recommendations for investments to bolster Pennsylvania's innovation economy. She collaborated with public servants across government agencies to create a holistic assessment of the State's innovation economy. She managed the overall project process, to set goals and timelines and support the collaboration of a team of five. The project resulted in the "*PA Innovation Economy Annual Report 2021*."

Planning Analyst, Department of Human Services, Allegheny County, PA (2021)

Sarah collaborated across key stakeholders including program departments, city officials, and community members to analyze health and human services issues and make recommendations for improvement and innovation. She developed grant applications, wrote and managed formal procurement documents, and reviewed project budgets to secure funding. Sarah also designed and implemented program improvement strategies and monitored subrecipient performance.

Chief Program Officer, Breakthrough Central Texas, Austin, TX (2012 – 2019)

Sarah served on the leadership team to support organizational growth, success, and the development of practices centering on the well-being of students, families, and staff, while leading 40+ year-round and 200+ seasonal staff to deliver high-quality programs and services to nearly 2,000 students and their families in Central Texas. She invested in and maintained key partnerships with school districts and community partners to support ongoing program growth and impact and evaluated program efforts to make continuous improvement and achieve outcomes across 22+ programs.

Reginald is an affordable housing assistance program expert with more than 20 years of experience in housing-related grant programs and homeownership financing programs.

Since joining the firm, Reginald he has provided leadership and advisory services for large, complex grant programs for State housing agencies. Specifically, he is managing the HAF grant programs being executed by the Delaware State Housing Authority, Iowa Finance Authority, and Kansas Housing Resource Corporation. He also served as Senior Policy Advisor for the HAF programs managed by the Texas Department of Housing and Community Affairs, West Virginia Housing Development Fund, and New York State Department of Homes and Community Renewal. In addition, he is providing technical assistance to the Montgomery County (PA) Office of Housing and Community Development to expand their First Time Homebuyers Program, which provides financial and counseling assistance to eligible borrowers to increase home ownership in affordable housing.

Before joining Witt O'Brien's in 2021 as a project manager and senior advisor, Reginald served as the Deputy Director of the Arizona Department of Housing, where he oversaw \$300 million annually and initiated the State's Homeowner Assistance Fund (HAF) program. Prior to that, he designed and implemented the State's Hardest Hit Fund (HHF) program, a U.S. Treasury program that serves to preserve homeownership, reduce foreclosures, and stabilize property values. Reginald previously had a long career in residential mortgage and lending business, which provides expertise in providing housing assistance through acquisition and preservation.

REGINALD GIVENS

MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

20+ Years

EDUCATION

BA, Business Administration, Wayland Baptist University

Grant Specialist, First Time Homebuyer Assistance, Montgomery County, PA (2025 – present)

We are providing support to enhance the usage of the Montgomery County Office of Housing and Community Development's First Time Homebuyers Program, which provides financial and counseling assistance to eligible borrowers to increase homeownership through affordable housing. Our support includes analyzing the real estate market and purchasing obstacles for potential home buyers and identifying strategies to address these barriers. As a grant specialist for this program, Reginald completed a program assessment and market assessment review to provide program improvement recommendations in the areas of awareness, access and appreciation.

Project Manager, Delaware State Housing Authority (DSHA) (2022 – Present)

As the Project Manager for the Delaware HAF, Reginald designed, developed, and implemented the program. Currently, he oversees the program's administration, which includes customer service; application and documentation review and analysis to determine eligibility; assistance disbursements; financial reconciliation; and data reporting.

Project Manager and Sr. Policy Advisor, Iowa Finance Authority (2021 – present)

As the Project Manager for the Iowa HAF program, Reginald was responsible for overseeing the administration of the program, which incorporates all aspects of the satisfaction of the \$20 million in grant requirements. He started as the project's Sr. Policy Advisor, where he established policies and procedures to determine the assistance eligibility determination process. Most recently, he helped to

develop the policy and procedures for the Home Repair Assistance element of the Iowa HAF program that was later added.

Project Manager and Sr. Policy Advisor, Kansas Housing Resource Corporation (KHRC) (2021 – Present)

Reginald currently serves as the Project Manager for the Kansas HAF program administered by KHRC. The project is in the closeout phase, which involves the final distribution and reconciliation of the grant funds and the submission of the final report. As the Sr. Policy Advisor, Reginald established policies and procedures to determine the assistance eligibility determination process.

Project Manager, Kansas Department of Aging and Disability Services (2023)

As the Project Manager for the Partnership Loan Program project, Reginald developed and oversaw the reconciliation of two large adult healthcare facility loans. This involved financial reconciliation of the loans and a compliance review of the requirements of the facilities.

Sr. Policy Advisor, Texas Department of Housing and Community Affairs (2021 – 2022)

Under the Texas Rent Relief Program, TDHCA administered a Federal grant program of approximately \$1.3 billion in financial relief to tenants and landlords, disbursing funds to more than 225,000 impacted households. As Sr. Policy Advisor, Reginald established policies and procedures to determine the assistance eligibility determination process and servicer interaction regarding the Common Data File (CDF) exchange process and the mortgage loan transaction specifics.

Sr. Policy Advisor, State of West Virginia Housing Development Fund (WVDHF) (2021 - 2022)

As Sr. Policy Advisor supporting the WVDHF's \$20 million HAF program, Reginald established policies and procedures to determine the assistance eligibility determination process and servicer interaction regarding the CDF exchange process and the mortgage loan transaction specifics. Witt O'Brien's also supported the State's Emergency Rental Assistance program.

Sr. Policy Advisor, New York State Department of Homes and Community Renewal (HCR) (2023 – Present)

As Sr. Policy Advisor supporting the State's \$539 million HAF program, Reginald established policy and procedures for servicer interaction regarding the CDF exchange process and the mortgage loan transaction specifics. He also provides comprehensive knowledge and insight to state and local government leaders in establishing their strategic initiatives, maximizing funding, setting policy, designing, implementing, and administering various programs and funding sources.

Deputy Director, Arizona Department of Housing (2017 – 2021)

Reginald initiated the implementation of the HAF program and was responsible for agency operations, where he oversaw \$300 million annually. He was responsible for agency operations, supervising the following functions or divisions of the agency: Legal Services, Human Resources, Procurement, Budget, Finance and Accounting, Loan Servicing, Mortgage Assistance, Public Records Information, Publication, Information Technology, Facility Management, and Fleet.

Foreclosure Assistance Administrator, Arizona Department of Housing (2009 – 2017)

Reginald designed, developed, and implemented Arizona's HHF program, a U.S. Treasury program. The program's primary objective is to facilitate the modification of mortgages, so they become affordable

and sustainable. In this role, he also coordinated the Your Way Home Program, a temporary Economic Stimulus program financed through the U.S. Department of Housing & Urban Development.

He also administered the National Foreclosure Mitigation Counseling Program for Arizona, coordinating efforts between housing counseling agencies and the HHF program. Other notable accomplishments included successfully completing and launching a \$50 million down payment assistance program for 17 communities throughout Arizona, where the real estate market has lagged behind the rest of the state. Over \$30 million in assistance was provided through the program, aiding more than 2,200 homebuyers. He also led his division to be one of the first to implement the Governor's Arizona Management System techniques, modeling the ideal practices of incorporating daily measurements on the division's Huddle Boards and conducting daily Huddle meetings.

Senior Advisor, Key Advisors Financial Group, Inc. (2002 – 2009)

Reginald served as partner and senior advisor in all functions of a mortgage brokerage firm originating retail, residential, and commercial transactions. He was licensed in Arizona, California, and New Mexico, with centralized operational support in Arizona.

Regional Vice President – Wholesale, Mortgage Lenders Network (2002 – 2007)

The Network provided non-conforming mortgage and home equity financing in America. Reginald was the profit and loss organization manager for the Western States wholesale origination regional office with 200+ employees producing \$250 million per month in production. He was responsible for all aspects of sales, operations, staffing, training, and vendor relations.

Tessa brings over a decade of experience serving at-risk communities, developing trusted relationships, implementing grants, and ensuring compliance with all regulatory requirements with a high level of cultural competence.

Her background includes quality assurance, policy and procedure review for compliance and grant management, and developing and managing community partners. She is an expert in meeting required documentation needs and brings experience working with culturally diverse populations.

Since joining Witt O'Brien's, Tessa has served in leadership roles on several Emergency Rental Assistance (ERA) Program projects for state governments. Her specific responsibilities on these projects include project quality, production, and metric maintenance in adherence to client policies/procedures and goals; training and management of staff; communications/compliance with clients and subcontractors; and budget compliance.

TESSA BROOKS

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

14 Years

EDUCATION

BS, Behavioral Sciences, Social Work Concentration, Purdue University

Deputy Project Manager, Iowa Finance Authority (2021 - 2023)

Tessa led a team of 12 Quality Assurance (QA) staff supporting Iowa's Rental and Utility Assistance Program. She reviewed policies and procedures and interacted directly with client leadership. Under her direction, the QA team moved over 8,000 ERA Program cases to final disposition.

Deputy Project Manager, Kansas Housing Resources Corporation (2021 – 2023)

Tessa led a team of 40 QA staff to support the state of Kansas' Emergency Rental Assistance (KERA) Program. She maintained staff and subcontractor compliance with client policies and procedures with high quality and production. Under Tessa's direction, the QA and Final Review teams moved over 58,000 KERA program applications to final disposition.

Assessment Unit Family Case Manager, State of Indiana Department of Child Services (2015 – 2020)

Tessa coordinated multiple investigations into reports of child abuse and neglect, which required ensuring regulatory information was correctly entered into the correct database within the required timeframe. She developed trusted relationships within the community, requiring cultural competency working with diverse cultures. She also trained and supported new Unit Family Case Managers.

Community Partners Supervisor and Family Support Worker, Dunebrook, Inc., Valparaiso, Indiana (2012 – 2015)

Tessa was responsible for maintaining community partnerships while continually adding new community partners to improve services. She developed trusted relations in diverse cultural communities. She was responsible for ensuring that all state grant program service standards were met or exceeded, providing performance statistics to validate compliance. She conducted quality assurance and ensured that all data entry met all schedule and quality requirements. She was responsible for staff performance and providing coaching. She started at Dunebrook as a Family Support Worker and was promoted after her first year.

Family Support Specialist, Early Head Start, Early Learning Partnership of Northwest Indiana (2010 – 2012)

Tessa was responsible for ensuring compliance and determining eligibility with federal program standards. She worked one-on-one with families in diverse communities, promoting parent education, early childhood development, medical/dental needs, social services, and parental involvement. She received the Geminus Corporate Excellence Award for successfully servicing 42 impoverished families and her consistent home visit attendance record.

Chelsea is a Certified Floodplain Manager (CFM) with 11 years of experience in mitigation grants management, community assistance, and program management and implementation.

Chelsea joined Witt O'Brien's after six years with the New Mexico Department of Homeland Security and Emergency Management, where she served as the State Hazard Mitigation Officer (SHMO) for three years. Chelsea has led the development and overseen the completion of nearly 120 hazard mitigation plans (HMPs) and projects for state, local, and tribal governments as well as large universities, quasi-governmental entities, and special districts through FEMA closeout. She is proficient in project planning, coordination, and timeline management.

Project Manager, City of Bell, CA (2025-Present)

Chelsea is leading the development of the City's first Hazard Mitigation Plan.

Floodplain SME, North Carolina League of Municipalities (2025-Present)

Chelsea is providing advisory services related to interpretation of FEMA flood maps, the 44 CFR, and other NFIP and insurance related questions related to the impacts of Hurricane Helene.

FEMA Mitigation SME, City of Tampa, FL (2024 - Present)

Chelsea is providing Mitigation technical support to the City following Hurricanes Ian, Idalia, Helene, and Milton, including project development and formulation, development of NOI's, and coordination across multiple city departments.

FEMA Mitigation SME, City of Newberry, SC (2025 – Present)

Chelsea is providing Mitigation technical support to the City as they work through recovery from the impacts of Hurricane Helene, which included damage to electrical and fiber infrastructure.

BRIC Project Manager, City of Bend, OR (2025)

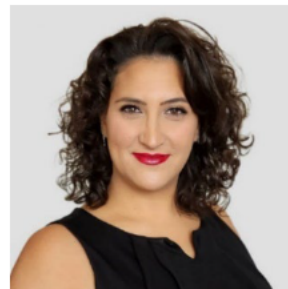
Chelsea managed the development and wrote two of the City's BRIC sub-grant applications for the 2024 cycle, totaling \$50 million.

Deputy Project Manager, Nevada Department of Emergency Management, NV (2024 – Present)

Chelsea provides technical assistance on hazard mitigation project application development to jurisdictions across the State of Nevada. She assists in the review and development of HMPs and Sub-grant applications for annual and disaster-related mitigation grants, including HMGP post-fire grants. She is also developing and delivering statewide training for state staff and Sub-grantees to increase capabilities at all levels.

CHELSEA MORGANTI, CFM

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

12 Years

EDUCATION

BA, English, Minor - Latin, University of New Mexico

CERTIFICATION

CFM since 2019, Association of State Floodplain Managers – New Mexico Chapter

FEMA Professional Development Series Certificate

TRAINING

FEMA: L-273, G-318, G-557, IS-100, IS-120, IS-200, IS-230, IS-235, IS-240, IS-241, IS-242, IS-244, IS-276, IS-280, IS-319, IS-321, IS-329, IS-922, IS-546, IS-547, IS-700, IS-702, IS-703, IS-706, IS-800, IS-1100, IS-1102, IS-1103, IS-1113, IS-2900

Project Manager, Fresno County, CA (2023 – 2025)

Chelsea is providing administrative support in the development of the multi-jurisdictional HMP through a community-informed, bilingual public outreach process, and facilitating activity support and compliance with the National Flood Insurance Program's (NFIP) Community Rating System (CRS). Fresno County includes 17 jurisdictions.

Project Manager, Union, Dickinson, and Polk Counties, IA (2023 – 2024)

Chelsea provided administrative support in the development of the three separate multi-jurisdictional HMPs, one that included NFIP CRS Activity 510 compliance. The counties include Union County (12 jurisdictions), Dickinson County (10 jurisdictions), and Polk County (34 jurisdictions). Two of these counties – Dickinson and Union – are highly rural in character, while Polk is more urban and home to Des Moines, the capital of the State of Iowa. Each of the plans were approved by FEMA.

Project Manager, City of Carson, CA (2023 – 2025)

Chelsea led the city's first HMP update since 2013. Originally profiling only three hazards – Earthquake, Flood, and Windstorm – the plan included significant updates and received FEMA APA in January 2025.

Plan Update Project Manager, Counties of Lehigh Valley and Northampton, PA (2023 – 2024)

Chelsea serves as Project Manager for this HMP Update covering 67 jurisdictions - 2 counties, 3 regional authorities, and 62 municipalities. Multi-jurisdictional collaboration was of utmost importance. In total, Chelsea delivered two virtual kickoffs, four hybrid capability workshops, two in-person Threat and Hazard Identification and Risk Assessment (THIRA) /Stakeholder Preparedness Review workshops, two four-hour long in-person participation "office hours," two in-person THIRA meetings, a hybrid Mitigation Strategy meeting, three 2-hour Action Development workshops, 12 one-on-one coaching sessions, and a virtual town-hall. This plan has been approved by FEMA.

Subject Matter Expert, National League of Cities (NLC) (2022 – 2025)

Chelsea leads the development and delivery of content and provides one-on-one municipal technical assistance through the NLC's Local Infrastructure Hub. She has presented FEMA's Building Resilient Infrastructure & Communities (BRIC) and Flood Mitigation Assistance grant programs, Clean Buildings, and the U.S. Environmental Protection Agency's Climate Pollution Reduction Grant. She provided support to FEMA Region VI in Denton, TX and additional cities throughout Texas.

Plan Update Project Manager, Montgomery County, MD (2022 – 2024)

Chelsea serves as Project Manager for the Local HMP update, while other staff from Witt O'Brien's update the County's Emergency Operations Plan. This allows for enhanced collaboration and plan integration. This HMP will be Emergency Management Accreditation Program compliant. Montgomery County includes 20 jurisdictions. This plan has been approved by FEMA and the project is complete.

Project Manager / Lead Planner, City of Carnation, King County, WA (2022 – 2023)

Chelsea served as Project Manager and Lead Planner in the development of the city's inaugural annex to the County's HMP. Witt O'Brien's was tasked with supporting the utilization of expiring grants funds and facilitating plan development after another jurisdiction declined to fulfill their agreement.

Grants Development Specialist, Cochise County, AZ (2022)

Chelsea wrote the County's BRIC sub-grant application for the 2022 cycle. The project was ranked #2 and awarded under the State of Arizona's allocation.

Plan Update Project Manager, District 7, Mississippi Emergency Management Agency (2022 – 2024)

Chelsea served as Project Manager/Mitigation Planner updating the Mississippi Regional HMP, which included an extensive file conversion and updates to include climate change. District 7 includes 9 counties and 32 total jurisdictions. This plan was approved in January 2024.

Deputy Planner, Colorado Department of Homeland Security and Emergency Management, Denver, CO (2022 – 2023)

Chelsea served as Deputy Planner updating the Colorado Enhanced State HMP. She facilitated meetings with all 28 state agencies, presented access and functional need and underserved population considerations, and profiled state agency mitigation activities. Witt O'Brien's was a sub-consultant on this project.

Hazard Mitigation Subject Matter Expert (SME), Alabama Emergency Management Agency (2022)

As a Hazard Mitigation SME, Chelsea was tasked with providing technical assistance on hazard mitigation project applications to jurisdictions across the State of Alabama. She assisted in the review and development of 528 sub-grant applications across four disaster grants, totaling \$147 million in project funds. Chelsea also delivered Benefit-Cost Analysis training to state staff to increase their capabilities.

SHMO, New Mexico Department of Homeland Security and Emergency Management, Santa Fe, NM (2019 – 2022)

As SHMO, Chelsea managed 17 disasters and non-disaster Hazard Mitigation Assistance (HMA) grants and facilitated 113 mitigation plans and projects through all sub-grant stages, from application through closeout. She supervised the Mitigation Unit, which included three Mitigation Specialists and the State Floodplain Coordinator who oversaw the state's NFIP compliance. She contributed to the 2018 NM SHMP and overhauled the state's Administrative Plan in 2017 and 2021, updating the Mitigation Standard Operating Guidelines, Sub-Grant Orientation Packet, and funding methodology. During the 2021 funding application cycle she processed 48 project Notices of Interest totaling more than \$100 million in requested funds. She regularly represented the agency at local, state, and national conferences.

Mitigation Specialist, New Mexico Department of Homeland Security and Emergency Management, Santa Fe, NM (2016 – 2019)

As a Mitigation Specialist, Chelsea provided individually tailored technical assistance to state agencies, local jurisdictions, tribal nations, and special district/quasi-governmental applicants under the HMA program. She reviewed and approved all procurement, contracts, and invoicing associated with sub-grant agreements. She drafted Scopes of Work, budgets, and schedules for New Mexico HMA grants and sub-grants. She has firsthand experience preparing wildfire applications for award under the HMGP, HMGP-Post Fire, BRIC, and Pre-Disaster Mitigation and managing and monitoring all awarded projects through to closeout, ensuring completion occurred in compliance with all federal, state, and local requirements. Chelsea also served in the State's Emergency Operations Center during activations, deployed to post-fire jurisdictions to provide mitigation technical assistance, and conducted numerous site visits for all project types.

Disaster Recovery Analyst, City Of New Orleans, LA (2015)

For the City's Code Enforcement, Chelsea facilitated 383 FEMA conditionally approved demolition properties through the code enforcement, local historic, and FEMA Environmental and Historic Preservation processes. She advocated for legal judgments of 'blight' at hearings; in city council meetings; and at local, state, and federal coordination meetings. She created and managed databases to track over \$16 million in grants. She inspected damaged properties, identified historic elements for preservation, and oversaw safe remediation and salvage of residential and commercial demolitions.

Site Supervisor, St. Bernard Project/Americorps, LA (2013 – 2014)

Chelsea managed and trained up to 40 staff and volunteers per site, per day, in the construction and renovation of Hurricane Katrina-damaged homes. She executed all construction phases, enforced quality control, and maintained a safe, OSHA-compliant worksite. Chelsea was responsible for accurately projecting Scope of Work timelines, budgets, and workforce needs.

Daniel (Dan) has six years of experience in municipal community development and grants programs, including HUD CDBG, HUD housing, and COVID-19 funding.

Since joining Witt O'Brien's in 2020, Dan has assisted multiple local governments with their COVID-19 relief programs under the CARES Act and ARPA. He examines the CRF and ARPA-funded programs for eligibility and compliance with 2 CFR 200 and other related Federal regulations. Dan also develops reporting strategies to bolster record retention and award compliance and provides grant project/program close-out services. Dan began his career in public service working for an Ohio municipality for two years.

Deputy Project Manager, Port of Long Beach, CA (2024 – Present)

Dan is providing technical assistance and internal controls development for the Port of Long Beach. Currently, Daniel has assisted the Port develop a Title VI training policy and procedure for Port staff. He has also assisted with the development of a Title VI monitoring plan. He also provides general guidance and technical assistance regarding Federal grant programs.

UASI Grants Monitoring Team Lead, City of Los Angeles, CA (2024 – 2025)

Dan was a team leader who helped facilitate subrecipient monitoring efforts which included desk reviews and site visits for 38 of the City's subrecipients of its Urban Areas Security Initiative (UASI) program. Daniel and his team utilized their expertise in Uniform Guidance, Homeland Security Grant Programs (HSGP) reporting and eligibility requirements, and subrecipient monitoring and management best practices to provide guidance to The City of Los Angeles' Mayor Office of Public Safety and their partners. The subrecipients included a variety of city and county agencies including police, fire, public health, and IT departments.

Grants Compliance Specialist, City of Richmond, CA (2023 – Present)

Dan is providing technical assistance regarding Uniform Guidance and assessed a monitoring engagement to determine areas of improvement for the City's monitoring procedures. The monitoring assessment has led to our team being approved to perform monitoring reviews on behalf of the City.

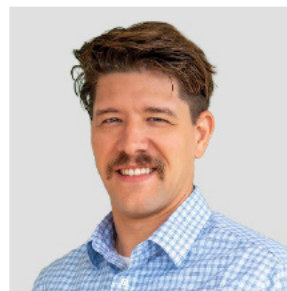
Subrecipient Monitor, California Department of Housing and Community Development (HCD), CA (2023 – Present)

Dan is part of the Witt O'Brien's team conducting a compliance assessment of the State's \$1 billion+ ERA Programs (ERA1 and ERA 2) for fiscal year 2021. He conducts sample selections for the 37 subrecipients of the program and performs compliance and conformance testing on a sample of subrecipients.

Project and Expenditure Reporting Consultant, Louisville Metro Government (LMG), KY (2023 – Present)

Dan is providing technical assistance regarding compliance and reporting tasks for the State and Local Fiscal Recovery Fund (SLFRF) programs and conducting the U.S. Treasury's Portal quarterly reporting

DANIEL PETRELLI, MUPD
MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

6 Years

EDUCATION

MA, Urban Planning and Development, Cleveland State University

BA, Political Science, Slippery Rock University

for the LMG. Since September 2022, Witt O'Brien's has provided the LMG Government with advisory and grants management services for the ARPA SLFRF.

Grants Specialist, U.S. Virgin Islands (USVI) Department of Education (2023 – Present)

As part of the Territory of USVI's continued recovery from back-to-back hurricanes in 2017 and the more recent pandemic, Dan is assessing the Department's monitoring and related policies and procedures. He is also leading a team that will develop and implement an obligation and expense strategy for the Department's Emergency Support Function (ESF)-3 award. This strategy includes determining the eligibility of programs, determining burn rates and program timelines, delegating team responsibilities, and updating USVI leadership.

Grants Monitoring Specialist, Wichita (KS) ARPA (2023 – Present)

Dan provided the City with monitoring and compliance support for various economic development programs funded by ARPA SLFRF and provided technical assistance and training to subrecipients and City staff on ARPA SLFRF and Uniform Guidance.

Grants Specialist, Metropolitan Water District of Southern California (MWD), CA (2023 – Present)

Dan is providing training regarding pre-award, application, and post-award phases of the grant lifecycle. Witt O'Brien's has held a grant consulting services contract with the MWD since 2022.

Grants Monitor, Kansas Department of Commerce, KS (2023)

Dan conducted monitoring reviews for the state's Building a Stronger Economy (BASE) program, which focuses on ARPA SLFRF economic development programs, including evaluation and monitoring.

ARPA Monitoring Team Lead, Harris County, TX (2021 – 2023)

As part of the project supporting Harris County's \$915 million ARPA SLFRF program, Dan led a team that developed County monitoring and subrecipient monitoring programs. He provided technical assistance to various County departments on compliance related to Uniform Guidance and SLFRF; Dan also delivered training on various aspects of Uniform Guidance to improve the knowledge of County staff and other subrecipients regarding Federal requirements for grant programs. Dan helped develop tracking tools so the County could better understand the level of risk their funding programs face, which helps enable them to avoid potential clawbacks from the Federal government or reductions in future awards.

Grants Monitoring Team Lead, King County, WA (2020 – 2023)

Dan developed monitoring strategies for 14 programs funded by the CRF and assisted the County in establishing a Grant Compliance Unit (GCU). For the latter role, he drafted policies and procedures for the GCU related to department engagement, program monitoring, subrecipient monitoring, and training. He also trained GCU staff on Unit policies and procedures, and general compliance requirements of Uniform Guidance and SLFRF. Through a multi-year, renewable contract with the County, Witt O'Brien's is providing post-award management, audit, and closeout services.

Community Development Manager, City of Euclid Department of Planning and Development, OH (2019 – 2020)

Dan was responsible for managing the City's CDBG Entitlement program administered by HUD. This included determining project eligibility for CDBG funding, managing the CDBG annual budget, compliance with 2 CFR 200 administration and procurement standards, and conducting drawdowns to

request reimbursement from HUD. He was responsible for preparing environmental reviews for projects receiving CDBG funding in accordance with 24 CFR Part 58. He wrote and submitted Annual Action Plans and the Consolidated Annual Performance and Evaluation Report (CAPER).

Housing Coordinator, City of Euclid Housing Department, OH (2018 – 2019)

Dan maintained the City's inventory of single- to three-family rental units. He was responsible for processing the annual rental registration payments and scheduled rental unit inspections, investigating unregistered rental inquiries, and prosecuting rental units not in compliance with city housing code chapter 1761.05 of the Euclid Code of Codified Ordinances.

Kailee is a Certified Grants Management Specialist (CGMS) with eight years of experience in grants research and application development and monitoring grant funding for compliance.

Kailee brings strong technical knowledge of designing and implementing grant solutions that address complex challenges. She understands how to secure and manage grant funding to ensure compliance and maximize an organization's ability to achieve its mission and objectives through successful grant-funded projects.

Kailee is also a former city Grants Administrator. In this role, she was tasked with paving the way toward centralized grants management practices for the city, developing policies and procedures, and managing all grant-related information. Kailee implemented a city-wide Grant Management solution and was lead on the implementation.

Senior Grant Management Specialist, Kansas Infrastructure Hub, Kansas Department of Transportation, KS (2023 – Present)

Kailee is supporting our work with the Kansas Infrastructure HUB. The HUB is a collaborative multi-agency body of Kansas state agencies formed to maximize federal funding from the Infrastructure Investment and Jobs Act/Bipartisan Infrastructure Law (IIJA/BIL). Kailee facilitates efficient delivery of projects that align with state agency guidelines, compliance, and reporting requirements. She delivers strategic planning, project organization, management, and administrative services. Kailee works with entities across the state to help them develop applications for Federal funding that will bolster local communities, accommodate growing populations, and tackle infrastructure challenges head-on.

Project Lead, Senior Solutions Engineer, Statewide Enterprise Resource Planning (ERP), State of Rhode Island, Providence, RI (2023 – Present)

As the Project Lead, Kailee collaborates directly with the State of Rhode Island to develop scopes of work to align their grant administrative processes with their new ERP solution.

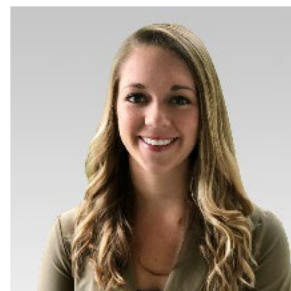
Senior Solutions Engineer – Grants, eCivis (2022 – 2023)

Kailee worked directly with local, tribal, county, and state governments to deliver moderate to complex grants management software solutions. She collaborated with the sales team to understand customer requirements and design tailored solutions. She led the end-to-end solution architecture and implementation for customer projects, ensuring successful deployments. She conducted comprehensive technical assessments, needs analyses, and proof-of-concept exercises to validate proposed solutions and drive customer buy-in.

Kailee provided technical consultation and guidance to customers, assisting in solution selection, roadmap development, and technology adoption strategies. She helped transition clients from inefficient manual methods to automated systems that streamline grant administrative processes, provided guidance on establishing efficient communication within a new system in order to ensure alignment to goals and requirements for effective grants management. Kailee acted as a subject matter

KAILEE WOLTERSTORFF, MA, CGMS

MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

8 Years

EDUCATION

MA, Public Policy, Liberty University

BA, Political Science, Dordt University

CERTIFICATION

Certified Grants Management Specialist (CGMS) *National Grants Management Association*, earned 12/4/23, exp. 12/31/26

expert on emerging technologies, industry trends, and best practices, providing thought leadership to customers and internal teams. She worked closely with cross-functional teams, including sales, product management, and engineering, to align solution design with customer requirements and business objectives.

Solutions Engineer, State of Rhode Island, Providence, RI (2021 – 2023)

Kailee supported the State of Rhode Island in reviewing recommendations and roadmaps for proposed solutions, conducted design and proof-of-concept reports to validate proposed solution requests, offered technical leadership throughout the implementation, and advocated for process improvements and solution development for the state.

Solutions Architect, eCivis (2021 – 2022)

Kailee analyzed business requirements and translated them into robust, scalable, and secure technology solutions. She collaborated with business stakeholders, executives, and technical teams to understand their grant management needs, align technology solutions with business goals, and manage expectations throughout the project lifecycle. Kailee delivered engaging product demonstrations and presentations to technical and non-technical audiences. She collaborated with cross-functional teams, managed complex projects, and drove successful solution deployments.

Implementation Support, State of Georgia Department of Community Affairs, Atlanta, GA (2019 – 2021)

Kailee worked directly with GA DCA agencies during the implementation of the Grants Management platform. She understood their unique grant processes, trained DCA staff on successful use of the software for automation, compliance, and subrecipient management, and collaborated with implementation team and GA DCA consultants.

Customer Success Manager, eCivis (2019 – 2021)

Kailee managed a portfolio of customer accounts, fostering strong relationships and consistently exceeding customer expectations for satisfaction and retention. She conducted regular business reviews with customers to understand their evolving needs, align product solutions, and identify growth opportunities. She led the successful onboarding and implementation of new customers, providing comprehensive training, documentation, and ongoing support to drive product adoption and customer success. She identified customer pain points and developed and implemented targeted strategies.

Kailee collaborated with cross-functional teams, including product management and development, to advocate for customer needs, prioritize feature requests, and ensure timely resolution of customer issues. She conducted regular customer health checks and proactive outreach to identify and address potential risks to customer success. She developed and delivered customer success metrics and reports to senior management, highlighting key trends, achievements, and areas for improvement.

Grants and Records Management Administrator, City of Suffolk, VA (2017 – 2019)

Kailee was responsible for managing all stages of the grant lifecycle including grant writing, budgeting, reporting, compliance, and evaluation. Additionally, she created a policy and procedures guide for the City to ensure compliance with laws and regulations. Kailee conducted extensive research and needs assessments to identify grant opportunities aligned with the organization's strategic goals and programs. She developed comprehensive grant proposals, including project narratives, budgets, and supporting documentation. She oversaw grant implementation, providing guidance to project teams, monitoring progress, and ensuring compliance with grant requirements and objectives.

Development Coordinator, Hope House Foundation, Norfolk, VA (2015 – 2017)

Kailee was responsible for supporting development teams in the planning and executive of funding campaigns. She provided grant writing support through research, gathering support materials, and assisting with proposal writing and submission. She was responsible for supporting the overall fundraising program to include planning, communications, and donor relationship building.

Kailee managed donor relations and philanthropic support to ensure the organization fostered long-term engagement and investment. She researched grant funding opportunities and oversaw several grant-funded projects. She assisted with annual fund activities in reporting to donors on the impact of their gifts on the mission of the organization. Kailee demonstrated to donor's fiscal accountability, prudent investment, and spending in accordance with donors' expectations, and conveyed ongoing appreciation for their support.

Emily brings 20 years of professional experience in disaster preparedness, response operations, and recovery grants management for government and community organizations.

Emily has extensive experience with FEMA recovery programs and served as a policy advisor for FEMA PA on several large-scale disaster recovery operations, including Hurricane Katrina and Superstorm Sandy. For six years, she served as the Regional Disaster Officer for the American Red Cross (ARC) in Central Florida and Louisiana, directing response and recovery operations during numerous hurricanes (Matthew, Michael, Laura, Delta, and Zeta) and other major events.

As a FEMA Technical Assistance contractor, Emily led the City of New Orleans Recovery Task Force following Hurricane Katrina, overseeing \$1 billion in FEMA PA funding for the City's infrastructure recovery. Her analysis identified systemic control weaknesses in project formulation, cost reasonableness determinations, and procurement compliance validation—contributing to FEMA's risk-based approach to financial stewardship. Since joining Witt O'Brien's in 2021, Emily has developed tools and processes to maximize access to, use of, and compliance with COVID-19 funding streams and Federal grant regulations.

Project Manager, Louisville Metro Government, Louisville, KY (2023 – Present)

Emily leads the Witt O'Brien's team engaged with the Louisville Metro Government supporting the implementation of its \$388 million ARPA SLFRF allocation. She oversees eligibility, compliance, and reporting requirements and facilitated a high-profile and dynamic \$40 million subaward reconciliation effort.

Monitoring and Compliance Lead, Harris County, TX (2023 – 2024)

For Harris County's \$313 million Affordable Housing SLFRF portfolio, Emily led the compliance and monitoring activities for the multi-family acquisition and development, single-family acquisition and rehabilitation, and legal aid and eviction services programs.

Grants Specialist, Minnesota Housing Finance Authority, MN (2023 – 2024)

Emily supported the program design, launch, and implementation of Minnesota's Emergency Rental Assistance (ERA) Program Phase II – Targeted Assistance. She developed policies, procedures, and training material to transform the prior program into a community-based housing stability resource, focusing on equitability in service delivery, accessibility, and low-barrier application processing for underserved community members.

EMILY CAMP, MPA, PMP

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

20 Years

EDUCATION

MA, Public and International Affairs, University of Pittsburgh

BA, Political Science, Union College

CERTIFICATION

Project Management Professional (PMP), No. 3847864, Project Management Institute, 2024

AWARDS

Market Leadership Award (2009)
National Chairman's Award (2007)

TRAINING

IS-00003, IS-00026, IS-00100.b, IS-00120.a, IS-00130, IS-00200.b, IS-00230, IS-00230.a, IS-00235.c, IS-00241.b, IS-00288.a, IS-324.a, IS-00368, IS-00405, IS-00546, IS-00547, IS-00650.a, IS-00700, IS-00700.a, IS-00703a, IS-00704, IS-00775, IS-00800, IS-00800.b, IS-00806, IS-00820, IS-1000, IS-1002, IS-1009, IS-02900, ICS-300, ICS-400.

Subrecipient Monitoring Lead, Jefferson County, AL (2022 – 2023)

For Jefferson County's \$85 million ERA Program, Emily developed monitoring protocols and evaluation frameworks and evaluated subrecipient financial management systems and program implementation for compliance.

Program Director, West Virginia Housing Development Fund, WV (2021 – 2022)

As the Program lead for West Virginia's \$155 million COVID-19 ERA Program, Emily recruited, trained, and oversaw over 100 disaster case managers in completing more than 42,000 applications exceeding \$155 million in Federal funding.

Strategic Advisor, Delaware State Housing Authority (DSHA), DE (2021)

For DSHA's \$43 million ERA Program, Emily provided strategic technical assistance for the State's transition between systems of record. She supported policy development and training materials for the application casework and quality control.

Grants Management Specialist, MFHA/Minnesota Housing, MN (2021)

For the MHFA's \$670 million ERA Program, Emily developed an integrated communications plan, community engagement strategy, and training for 170 case managers to enhance outreach and engagement with applicants, tenants, and other program stakeholders.

Regional Disaster Officer, American Red Cross (2015 – 2021)

Emily started in 2015 as the Regional Disaster Officer for Central Florida, overseeing disaster operations across 18 counties. In 2016, she was appointed Regional Disaster Officer for Louisiana, assuming oversight of the ARC's disaster mission throughout the state and administering the annual \$2 million budget. She served in leadership roles on national ARC response operations following Hurricanes Michael and Matthew, the Louisiana Flooding of 2016, and the Orlando Pulse Nightclub Response. After Hurricanes Laura, Delta, and Zeta, she served as Director of the ARC Unified Command, managing more than 700 staff and volunteers, sheltering more than 8,000 evacuees, and delivering \$5.7 million in casework and ARC recovery program funding. She also oversaw a team of 15 staff and 1,000+ disaster volunteers in providing annual disaster preparedness training for 4,000 households. She led case management operations providing financial assistance to more than 1,600 families annually.

Disaster Recovery Consultant, FEMA Public Assistance (2011 – 2015)

As a FEMA PA-TAC contractor, Emily led the City of New Orleans Recovery Task Force following Hurricane Katrina. She led the operational oversight and program management coordination of \$1 billion in FEMA PA funding for the City's infrastructure recovery. Following Superstorm Sandy in New Jersey, she oversaw teams conducting \$21M in PA emergency work through private property debris removal and demolition.

Management Consultant, PriceWaterhouseCoopers, Washington, DC (2006 – 2011)

As a senior management consultant, Emily engaged in organizational design, process reengineering, and strategic governance to enhance FEMA's PA program delivery model. Specifically, for FEMA's Office of the Chief Financial Officer, she designed and implemented the Improper Payment Information Act (IPIA) testing methodology to analyze PA program disbursements across multiple disasters. Additionally, Emily conducted comprehensive root-cause analysis of recurrent PA audit findings from both OIG and GAO reports.

Management Consultant, U.S. Department of Homeland Security (2005 – 2006)

Emily served on the National Infrastructure Protection Plan (NIPP) writing team at the DHS Program Management Office to assist the Department in the implementation of Homeland Security Presidential Directive-7.

Allison is a policy advisor with nearly 20 years of experience developing and leading government program implementation and optimization.

She has focused on creating and scaling innovative solutions to systemic issues within communities and organizations. Since joining Witt O'Brien's, she has provided policy advisory and grants management services to state and local governments, primarily for COVID-19-related funding programs, including the Homeowners Assistance Fund (HAF) and Emergency Rental Assistance (ERA) programs.

Previously, Allison was responsible for multiple innovative projects that impact the economic wellbeing of communities and individuals. This included playing a lead role in organizations in Canada, launching and growing a unique not-for-profit organization, and facilitating the development of a multi-stakeholder initiative to drive efficiencies in the energy and construction sectors.

Strategic Advisor and Production Manager, New York State HAF Program, New York, NY (2021 – Present)

Allison has been a key advisor in Witt O'Brien's support of New York State's \$539 million HAF program, one of the largest in the country. This program is under the administration of the Department of Homes and Community Renewal in partnership with the New York Center for Sustainable Neighborhoods. Allison has been overseeing applicant processing and providing overall advisory support on implementation.

Project Manager, ERAP Program, Ocean County, NJ (2021 – 2022)

Allison oversaw the county's ERAP program through the final six months of application processing and supported Ocean County with the program's close-out. Witt O'Brien's had partnered with two firms to establish a call center and develop an ERAP-specific system integrated with local databases to ensure eligibility compliance and maximization of reimbursements. Allison oversaw the team of 12 case managers and the two subcontractors, Plexos (for the call center) and UnQork (for the system of record).

Project Manager, Texas Department of Housing and Community Development, Austin, TX (2021 – 2022)

Allison supported the State of Texas in implementing the HAF program, particularly identifying and monitoring effective outreach strategies to reach low-income and minority communities. This included identifying organizations to partner with in target communities that would engage with eligible homeowners for application assistance. Allison led the development of tools and materials that would be used to support these organizations in their efforts (training materials, reporting templates, and program performance tracking dashboards).

Grant Consulting Services, Multiple Clients (2021)

Allison provided strategic consulting to small-to-medium-sized private and not-for-profit organizations. She identified key funding streams for non-profits including foundations, government grants, and fee-for-service models. She worked with leadership to identify and validate opportunities, researched, and

ALLISON BYRNE

MANAGEMENT CONSULTANT IV



YEARS OF EXPERIENCE

19 Years

EDUCATION

MBA, University of Alberta

Bachelor of Applied Policy Studies,
Mount Royal College

BA, Political Science, University of
Calgary

helped determine optimal internal operations to support performance management and customer service.

National Director of Strategy and Operations, Single Stop, New York, NY (2015 – 2021)

Single Stop is a non-profit organization that uses technology and partnerships to provide resources to low-income families and individuals. Allison served as National Director of Strategy and Operations for two years and was responsible for overseeing the organization's strategy, overall operations (financial, programmatic, and performance), and sales and fundraising. She monitored the comprehensive program's effectiveness and progress. She led consultations with parent company subsidiaries and cross-functional teams to integrate the Single Stop program and technology into programs, including criminal justice and workforce development contracts. In addition, Allison provided oversight of all revenue and expenditure throughout the organization and guided the organization through revenue diversification. Before being promoted to National Director, Allison served as Director of Community Programs and Operations (two years) and Director of Program Development (two years).

Managing Director, GO Productivity, Calgary, Alberta, Canada (2013 – 2015)

GO Productivity was developed as a new organization to offer a range of services to help companies become more efficient and profitable. As Managing Director for Project Alignment and Delivery, Allison led organizational expansion into the energy and construction sectors to improve the industry's productivity and competitiveness. She engaged with senior leadership from across the industry and with industry associations, government agencies and departments, special interest groups, and the media.

Senior Director, Productivity Alberta, Calgary, Alberta, Canada (2011 – 2013)

Allison served as Productivity Alberta's Senior Director of Program and Business Development, with the responsibility of enhancing services for its current client base and assessing market opportunities for future growth, including program enhancements and geographic reach. She created strong relationships with key industry associations and other stakeholders in new markets, expanding the company's credibility in the construction sector.

Manager, Government of Alberta, Calgary/Edmonton, Alberta, Canada (2009 – 2011)

As Manager of Productivity Improvement and Internal Operations, Allison developed and implemented a provincial strategy and program focused on improving productivity and competitiveness amongst small and medium-sized enterprises. She led a provincial engagement strategy with industry and government stakeholders to identify challenges facing small businesses and develop a strategy to improve business performance across the province. As a result, Productivity Alberta was approved and launched.

Industry Development Officer, Government of Alberta, Calgary/Edmonton, Alberta, Canada (2005 – 2009)

Allison served as Industry Development Officer for Economic Development, supporting industry development leads in implementing key department strategies. She developed and launched industry engagement events and sessions, including implementing a major cross-country manufacturing event that doubled in size during this time.

Sandeep is a Project Management Professional (PMP) and Certified Construction Manager (CCM) with more than 20 years of experience in construction and project management in disaster recovery.

Sandeep is highly adept at Benefit-Cost Analysis (BCA) using the FEMA BCA Toolkit (Version 6.0). He has supported projects under FEMA Public Assistance (PA), Hazard Mitigation Grant Program (HMGP), Sheltering and Temporary Essential Power (STEP), and HUD CDBG-DR. He has experience developing and reviewing detailed BCAs for applicants, preparing preliminary Hazard Mitigation Assistance (HMA) BCAs for screening projects for efficiency and prioritizing projects for ranking and submission to FEMA. His background includes defining Scopes of Work (SOWs), developing cost estimates, identifying project-specific hazard mitigation opportunities, and creating 406 Hazard Mitigation cost estimates in conjunction with the repair of disaster-damaged facilities. He also understands how to prepare detailed cost estimates using RSMeans, Applicant's Force account labor, equipment, and material costs, and FEMA's Cost Estimating Format (CEF) for large projects.

BCA Specialist, USVI Office of Disaster Recovery (lead agency), St. Croix, USVI (2024 – Present)

Sandeep is currently supporting the Witt O'Brien's comprehensive disaster recovery effort in the USVI that began after Hurricanes Irma and Maria. He is providing BCA support for Section 404 HMGP and competitive HMA programs such as BRIC and FMA, as well as project applications under FEMA PA. His work includes performing and validating BCAs for a variety of mitigation projects, including flood mitigation, energy resilience, erosion control, and seismic retrofits. To date, Sandeep has supported applications totaling over \$200 million in project value, with more than \$100 million approved for implementation. His expertise extends to addressing RFIs, preparing environmental and feasibility reviews, and ensuring compliance with FEMA guidelines for cost effectiveness and technical adequacy.

BCA Specialist, Charlotte County, FL (2023)

Sandeep provided comprehensive technical assistance to Charlotte County as they recover from Hurricanes Ian and Idalia. He completed and properly documented BCAs in compliance with FEMA guidelines. He worked closely with County officials and stakeholders to ensure that all analyses were accurate, well-documented, and aligned with program requirements. Sandeep's responsibilities included performing and validating BCAs for a variety of mitigation projects, including flood mitigation, generators for critical facilities, energy resilience, and saferoom retrofits.

BCA Specialist, Virginia Department of Emergency Management (VDEM), VA (2023)

As part of program management support for VDEM's BRIC and FMA programs, Sandeep provided technical assistance to a variety of sub-applicants, including municipalities, counties, and public utilities.

SANDEEP SINGH, PMP, CCM MANAGEMENT CONSULTANT II



HOME OFFICE LOCATION

Indiana

YEARS OF EXPERIENCE

24 Years

EDUCATION

BS, Civil Engineering, Syracuse University

CERTIFICATIONS

Project Manager Professional (PMP), #2567533, Project Management Institute, expires May 21, 2025

Certified Construction Manager (CCM), Construction Management Association of America, CMCI #13505

TRAINING

FEMA IS-230.E, IS-276.A, IS-1000, IS-1006, IS-1008, IS-1013.

His responsibilities included assisting with application development tasks such as project scoping, cost estimating, and conducting and documenting BCAs in compliance with FEMA guidelines. Sandeep performed and documented 15 BCAs for a range of mitigation projects, including stormwater drainage improvements and floodplain acquisitions, backup power generation for water treatment plants and emergency shelters, wind-hardening and floodproofing for public facilities and roadway elevation and bridge improvements.

Hazard Mitigation Specialist, Contract Assignment, New York State Division of Homeland Security and Emergency Services (NYS DHSES), New York, NY (2021 – 2023)

Sandeep assisted with application development for HMGP, BRIC, and FMA programs; documented migration to FEMA GO; maintained communication with subrecipients and provided technical assistance to eligible subrecipients; and evaluated proposals to make recommendations for program funding. He also developed, implemented, and oversaw quality control and quality assurance processes to ensure compliance with FEMA policies, procedures, and regulations. His BCA work involved preparing preliminary HMA BCAs, developing detailed BCAs for HMA sub-applications, and reviewing HMA BCAs prepared by sub-applicant staff to ensure adequate supporting documentation existed and projects had a passing Benefit-Cost Ratio.

Senior Costing Specialist/406 Hazard Mitigation Specialist, FEMA PA Technical Assistance Contract, Contract Assignment, FEMA Consolidated Resource Center (CRC) Atlantic, San Juan, PR (2019 – 2021)

Following Hurricane Maria in Puerto Rico (DR 4339-PR) and the USVI (DR 4340-USVI), Sandeep worked in the FEMA CRC in Puerto Rico to provide recovery support. His responsibilities included but were not limited to reviewing and determining eligibility for Private Non-Profit organizations, public facilities, and infrastructure for FEMA funding and extent of applicable damages in accordance with FEMA PA policies and procedures, developing cost estimates and SOW for Categories A, B, C, E, and G and identifying project-specific hazard mitigation opportunities and creating 406 Hazard Mitigation cost estimates. He also developed preliminary cost estimates to provide funding for Version 0 Architectural and Engineering design services and created detailed cost estimates using RSMeans, Applicant's Force Account Labor and Equipment Costs, and FEMA's CEF.

Senior Project Manager, FEMA Emergency Home Repair – Virgin Islands Program, FEMA STEP Program, Contract Assignment, St. Croix, USVI (2018 – 2019)

Following Hurricane Maria in USVI, Sandeep served as a Senior Project Manager for the FEMA Emergency Home Repair/STEP program in St. Croix. He collaborated with FEMA, consulting firms assisting in disaster recovery, the Virgin Islands Housing Finance Authority and local partners to develop Project Scopes, Preliminary Cost Estimates, and monitor permits. His major responsibilities included reviewing Preliminary Damage Assessments, Damage Descriptions and Dimensions, SOWs; approving drawings and specifications of roof repairs and roof replacement with subcontractors; conducting detailed estimates using RSMeans, CostWorks, and FEMA CEF; and assisting with Closeout.

Senior Project Manager/BCA Analyst, Steel Associates, LLC, New York, NY (2014 – 2018)

For NYS DHSES HMGP, Sandeep managed projects with FEMA funds from FEMA 404 HMGP and FEMA PA Program for 33 Community Centers for sub-grantee New York City Housing Authority (NYCHA) among his other responsibilities.

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Construction Project Manager, TDX Construction Corporation, New York, NY (2014)

In this role, Sandeep collaborated with NYCHA, New York City School Construction Authority, (NYCSCA) and other stakeholders to develop Project Scopes and Preliminary Cost Estimates among his other responsibilities.

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Senior Project Manager, Zoria Housing, LLC, Queens, NY (2010 – 2014)

Sandeep was responsible for directing all phases of construction management including procurement, initiation, planning, execution, monitoring, controlling and closeout phases. He supervised field personnel and coordinated special inspections; prepared cost estimates and bids based on blueprints and specifications for NYCHA and NYCSCA projects among his other responsibilities.

Dr. Wright is a Professional Civil Engineer specializing and urban water resources. He brings 35 years of experience in the planning, design, and management of water utilities and related infrastructure systems.

As a utility expert, Dr. Wright brings expertise in identifying integrated water resource engineering solutions to address sustainable adaptations to the impacts of climate change. He specializes in applied hydrology and hydraulics related to potable water treatment and distribution, wastewater collection and treatment, and integrated stormwater management.

Since joining Witt O'Brien's, he has provided technical advisory services in disaster recovery for water and energy infrastructure. Specifically, for six years, he has supported US Virgin Islands recovery from Hurricanes Irma/Maria by assessing impacts on utilities and supporting documentation for new infrastructure using FEMA Public Assistance and other Federal disaster recovery funding. He is also supporting development of hazard mitigation projects in New Mexico for infrastructure damaged by wildfire and post-fire flooding.

Previously, Dr. Wright worked directly for a local water and sanitation utility and brings more than 20 years as an engineering consultant. He has also been an instructor/lecturer for multiple undergraduate and graduate level civil engineering courses at the University of Colorado.

He has a broad, multidisciplinary background in decision support systems that include the use of simulation-based decision support strategies, risk mitigation (including impacts of a changing climate on civil infrastructure, including the supplies and demands on freshwater resources).

Engineering SME, New Mexico Department of Homeland Security and Emergency Management (DHSEM), NM (2023 – Present)

Len is assisting the team in developing hazard mitigation projects for the recovery from wildfires in three counties—the Calf Canyon and Hermits Peak Fires in San Miguel and Mora counties and the McBride Fire in Ruidoso, in Lincoln County. He has been focusing on the impacts of post-fire flooding on transportation, drainage, and water supply. Post-wildfire flooding in these areas destroyed critical infrastructure and FEMA required an evaluation of sizing drainage features for replacement costing purposes. To address this need, Len has been developing custom tools to address Hydrologic and Hydraulic evaluations of damaged drainage infrastructure in these areas. Methods included geospatial evaluation of burn-scar runoff hydrology considering climate change, sediment generation and control, and a custom hydraulic model to estimate culvert and

LEN WRIGHT, PHD, PE, D.WRE

MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

35+ Years

EDUCATION

PhD, Water Resources, University of Colorado

MS, Environmental Resources Engineering, State University of New York College of Environmental Science and Forestry

BS, Environmental Resources Engineering, State University of New York College of Environmental Science and Forestry

LICENSES/AFFILIATIONS

Diplomate, American Academy of Water Resources Engineers

Professional Engineer: Colorado (41368); New York (071128); U.S. Virgin Islands (1840-E)

Professional Civil Engineer: New Mexico (29379)

Member, American Society of Civil Engineers

drainage feature sizing. Approximately 200 drainage features were evaluated to be used to develop recovery budgets for the three county applicants.

Engineering SME, Puerto Rico Electric Power Authority (PREPA), San Juan, PR (2023)

Len assisted in the life-cycle evaluation of collection and conveyance facilities serving an extensive hydropower system in Central Puerto Rico. The evaluation considered future capacity and existing condition assessment of remote facilities for allocation of recovery funds.

Subject Matter Expert, Water and Power Administration (WAPA) and the Waste Management Authority (WMA), US Virgin Islands, (2019 – Present)

Len currently serves as a Subject Matter Expert for Witt-O'Brien's in the US Virgin Islands where he has directed the assessment of the WAPA Water Distribution system and the VIWMA Wastewater Collection System across the three primary islands in the territory. This work has brought more than \$8B in recovery funds to the territory. He and the Witt-O'Brien's team have successfully shown areas of significant damage resulting from the hurricanes of 2017 resulting in the near total replacement of the water and wastewater infrastructure systems funded by the FEMA Public Assistance program.

Senior Water Resources Engineer, Eagle River Water and Sanitation District, CO (2018 – 2022)

Len worked for the Eagle River Water and Sanitation District as a Planning and Resources manager, leading a team of professionals that included Professional Engineers, GIS staff, plan review development staff, and water conservation and sustainability professionals. He also served as a Senior Water Resources Engineer, where he directed engineering solutions from raw source water through treating wastewater effluent and receiving waters; from day-to-day operations to long-range water supply planning.

Planning Manager, Carollo Engineers (2015 – 2018)

As a Planning Manager in the Infrastructure Practice, Len supported municipal governments and utility systems in developing innovative solutions to the life cycle management of water resources infrastructure and long range planning of additional infrastructure capacity. He primarily worked on drainage and sewerage systems, water quality management, and water supply. For Santa Fe, NM, he developed a long-range water supply strategic plan that included the benefits of groundwater augmentation through the use of green drainage infrastructure.

Senior Engineer, AMEC (2013 – 2014)

Len served clients with a diverse set of water resource needs, from flood recovery efforts to advanced statistical and optimization modeling for water supply planning. He was the project manager for the Town of Jamestown Stream Corridor Master Plan, following the devastating floods of 2013. He also managed and developed a sophisticated water supply planning analysis for Welsh Water in Wales, UK. He also was corporate Quality Assurance/Quality control officer for a large sanitary sewer inflow and infiltration project in St. Louis, MO.

Water Resources Engineer, Independent Consultant (2008 – 2013)

Len provided integrated solutions to water resource infrastructure problems to a diverse set of clients including local governments (Hartford, CT; Broward County, FL), the Hopi Tribe (AZ), EPA, private

engineering firms, and the World Bank. These projects typically included a combination of simulation, risk analysis, and optimization techniques to develop watershed-based strategies.

Project Manager/Consultant, World Bank (2009 – 2010)

Len served as the project manager for a World Bank project to estimate the economic impact of adapting to climate change for the countries of Mozambique, Ethiopia, and Ghana. He oversaw a large group of international experts who used state-of-the-art biophysical models to estimate the effects of climate change on agriculture, infrastructure, and energy production. For the work in Mozambique, Len was also the subject matter expert for the hydroelectric sector. He used simulated streamflow from climate projections to project future hydro-electric power generation, which in turn fed an economic model to estimate future economic impacts of adaptation strategies.

Water Resources Engineer, Carollo Engineers, CA (1997 – 2008)

As an Integrated Water Resources Engineer, Len assisted with client development efforts, led successful contract proposals, project delivery management, hydrologic and hydraulic modeling, decision support analysis, infrastructure asset management, risk analysis. As an independent consultant for the firm, he developed a method to optimize collection system rehabilitation efforts with downstream treatment capacity upgrades for an aging sanitary sewer system in California.

Ingrid has 30 years of experience in grants research; application development; grants compliance; and risk management with expertise in community planning, housing, and economic development issues.

Ingrid currently assists Witt O'Brien's clients in pursuing and managing Federal, state, local, and foundation funding opportunities. She has worked as a community and government liaison and project manager assisting with infrastructure, economic, and community development through marketing and business management.

Grant Specialist, Alabama Association of Habitat Affiliates (AAHA), AL (2024 – Present)

The AAHA was allocated \$15 million of the State's ARPA/SLFRF funding to support homebuilding, home repair, and downpayment assistance options for disproportionately impacted populations. Ingrid contributed to the AAHA Monitoring Plan to ensure continuity and accurate documentation of recommended program implementation.

Grants Writer, Hope Mill, NC (2024 – present)

Ingrid has assisted Hope Mills in developing and submitting grants totaling \$4.1 million, including grants for FEMA BRIC, AFG, NC Governor's Highway Safety Program, and several foundations.

Grants Pursuance Specialist, North Carolina League of Municipalities (NCLM), NC (2023 – Present)

Witt O'Brien's is providing technical assistance to municipalities in North Carolina with grants research, writing, and braided funding guidance to maximize Federal grants programs. Ingrid manages grants pursuance and grants management support for 14 towns. She developed 12 grants totaling \$6.5 million including grants for parks, SS4A, and public safety. Specifically, she developed a Park Strategy Plan to serve as a template to develop a process for establishing a park board to implement land acquisition and execute funding options as a long-term strategy.

Grant Writer, Multiple Jurisdictions, AL (2023 – Present)

Ingrid has assisted several Alabama jurisdictions in pursuing Federal, state, and private grant funding opportunities. To date, she has written 12 grants totaling \$28.5 million. This has included leading the development of St. Clair County's \$9.7 million Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant submission. For Trussville, she developed a Railroad Crossing Elimination (RCE) grant for \$6.7 million. She secured \$472,600 for the City of Opelika through the Alabama Historical Commission's Preservation of Alabama's Significant Sites (PASS) and a \$15,000 Norfolk Southern Match for a \$281,200 Safe Streets for All (SS4A) demonstration grant to implement a Railroad Technology Improvement system for the City of Alabaster. For St. Clair County, she led the development of the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant submission. For the City of Moody, she developed two grants for museum development for \$132k.

INGRID AULT, MURP MANAGEMENT CONSULTANT III



YEARS OF EXPERIENCE

30 Years

EDUCATION

MS, Master Urban Regional Planning (MURP), Eastern Michigan University

BS, Geography, Business Minor, Concentration in Cartography, Eastern Michigan University

CERTIFICATIONS / TRAINING

Certified Grant Administrator, Community Development Block Grant (CDBG) – awarded by Michigan Economic Development Corporation; Environmental Review Training; Labor Standards Training

Redevelopment Ready Communities Best Practice Training Series; Michigan Economic Development Corporation Facilitative Leadership, Michigan State University (MSU) Extension; Capital Improvements Program Training, Michigan Municipal League; Advanced Facilitative Leadership, MSU Extension

Grant Writer, Nebraska Broadband Office, NE (2023 – Present)

In support of the NE Broadband Office in the State's Department of Transportation, Ingrid assisted with the development of the Nebraska Broadband, Equity, Access, and Deployment (BEAD) grant proposal. She contributed to the 13-section document ensuring continuity and accurate documentation of the facts presented. In addition, she assembled the complete document including appendices.

ARPA Grants Specialist, Multiple Clients (2023 – Present)

Ingrid provides grant administration support for ARPA programs in Abington, PA; Ocean County, NJ; and Graham County, AZ, assisting with grant pursuance opportunities or providing technical assistance in the development of Expense and Eligibility Memos.

Policy and Grants Analyst, Kansas Housing Resources Corporation (KHRC), KS (2023 – 2024)

Ingrid was part of the team supporting KHRC with the implementation of the State's \$56 million Housing Assistance Fund (HAF) program. She wrote the policy, procedure documents, and contracts; beta-tested and drafted terminology for Yardi software; prepared Treasury guidance and reporting metrics for the client; and assisted with the onboarding and support of 29 QA/QC staff.

Grants Specialist, Sonoma County, CA (2023)

Witt O'Brien's assisted Sonoma County's Human Services Department in managing the distribution and administration of \$40 million of its \$80 million ARPA funded program. As part of this team, Ingrid served as a grants manager and wrote 28 Expense and Eligibility Memos documenting the purpose and eligibility of funded projects.

Grants Specialist, Wichita, KS (2023)

For Wichita's \$72.4 million ARPA program, Ingrid wrote 21 Expense and Eligibility Memos documenting the purpose and eligibility of funded projects.

Grants Specialist, Metropolitan Water District (MWD) of Southern California, CA (2023)

Ingrid supported MWD in developing its grants management operations and building internal capacity. She developed policy and procedure revisions to align with the new Grant Management Department.

Policy Analyst, King County, WA (2021 – 2022)

In support of the County's ERAP, Ingrid wrote policy and procedures guidance; compiled FAQs listing comparisons for the U.S. Treasury, state, and county programs; and wrote the tenant and landlord forms. For the SLFRF program, Ingrid served as a Grants Manager writing Expense Eligibility and Considerations Memos totaling approximately \$150 million. Ingrid framed policy guidelines for Duplication of Benefits, Premium Pay and Subrecipient Management, and Monitoring Guide of ARPA funding for Witt O'Brien's clients. Ingrid provides expertise in applying CFR Uniform Guidance and risk assessment for Federal guidelines. She performs research, applies appropriate analytical methodologies, and summarizes findings for eligibility of expenditures.

Director of Special Projects, Michigan Association of Planning (MAP), Ann Arbor, MI (2018 – 2019)

As Director of Special Projects, Ingrid researched and supported the development of the Department of Environmental Quality Great Lakes Coastal Zone Management Grant for tourism and economic development natural resource preservation toolkit for coastal communities. She organized the annual

conference in 2018 attended by 1,100+ MAP and MML members in Grand Rapids, MI. Ingrid managed the membership database, prepared educational outreach materials, tabulated and disseminated feedback for educators, forwarded recognition documents to honor member achievements, and prepared the e-newsletter.

Government and Public Policy Work Team, Michigan State University Extension, Marshall, MI (2014 – 2017)

Ingrid was employed by MSU Extension and the Greening Michigan Institute and was a team member of the Government and Public Policy Work Team and contracted by Calhoun County. She developed and managed Calhoun County's Community Development Department including community and economic development projects and parks management. She worked as the Michigan Economic Development Corporation Grant Manager for a \$1.5 million workforce development grant for Brembo North America, Inc. creating 169 LMI jobs. Ingrid managed Calhoun County's Park system, Parks and Recreation Commission, and an endowment fund. She developed and wrote a five-year Parks and Recreation Master Plan for Calhoun County and management and maintenance plans for county parks.

Executive Director, Think Local First, Ann Arbor, MI (2008 – 2014)

As Think Local First's Executive Director, Ingrid provided support for locally owned independent businesses through resource-sharing, education and advocacy, developing support strategies, and raising community awareness. She implemented strategies that resulted in a 150% increase in membership. Ingrid developed a strategic plan and annual budget with a methodology to map the progress of goals, among her many accomplishments.

Director, Ypsilanti Downtown Development Authority (DDA), Ypsilanti, MI (2005 – 2006)

As Director, Ingrid administered marketing, redevelopment, and economic revitalization initiatives for the City of Ypsilanti's historic Downtown, Depot Town, and West Cross businesses. She was Project Manager of the \$950,000 streetscape improvement project, \$336,500 Michigan Economic Development Corporation grant, and the \$100,000 Michigan Cool Cities Main Street Program (MCCMSP) grant, which she wrote, researched, and compiled in 2005.

Leah has 7 years of experience as a Grants Management Specialist.

She currently supports the Kansas Infrastructure Hub project, where she provides technical assistance to rural and urban communities in the South-Central region of Kansas. Leah's experience spans Federal and State Housing Funding, comprehensive knowledge of Federal Code of Regulations for grant management, and collaborative experiences with nonprofits, local education agencies, and state agencies. As a Grants Analyst for the Arizona Governor's Office of Strategic Planning and Budgeting, on the Grants and Federal Resources team, she expanded her expertise on Federal grants including ARPA/SLFRF and GEER. Her passion is ensuring the efficient and effective utilization of public funds, coupled with strategic planning to enhance support for underserved populations.

Grants Specialist, Kansas Infrastructure Hub, Topeka, Kansas (2023 – Present)

Leah provides technical assistance to rural and urban communities in the South-Central region of Kansas.

Grants Analyst, Arizona Governor's Office of Strategic Planning and Budgeting, Phoenix, Arizona (2022 – Present)

Leah is monitoring Federal Funds including ARPA and GEER. She works with grantees through the full life cycle of grants including non-profits, LEAs, and state-agencies. She completes monthly, quarterly, and annual federal funding reports. She assists with audit finding correction process.

Property Manager, Olympic Community Action Programs, Port Townsend, Washington (2019 – 2021)

Leah managed multiple low-income housing complexes in accordance with HUD. She wrote and managed 1/10th of 1% sales tax grant for Substance Use and Mental Health Services. She managed Veteran Affairs rental assistance grants. Leah adapted policies and procedures to reflect COVID-19 State and Federal proclamations.

Direct Services Specialist, Food for People, Eureka, California (2017 – 2018)

Leah provided intake counseling in accordance with USDA regulations. She hosted weekly volunteer orientations and coordinated volunteer events. Leah implemented a 'person-first language' and disability awareness training.

LEAH RUSSELL

MANAGEMENT CONSULTANT II

**YEARS OF EXPERIENCE**

7 Years

EDUCATION

Masters of Public Administration (MPA), Arizona State University

BA, Recreation Administration, Humboldt State University

Katje has four years of experience in grant management, budget management, process improvement, and knowledge of financial compliance.

She is experienced in navigating Federal and state grant regulations, including pre-award through post-award activities and financial reconciliation. Katje joined Witt O'Brien's in 2021 and provides COVID-19 policy analysis support nationwide, conducting research and guiding clients on the latest rounds of American Rescue Plan Act (ARPA) funding.

Policy Analyst, Witt O'Brien's (2021 – Present)

Katje supports the State of Rhode Island grant management system statewide implementation. She is helping implement eCivis as the state grant management tool fully integrating with their financial system. As she is very familiar with the eCivis software from her work for the State of Arizona, she provides training and subject matter expertise.

Katje also tracks ARPA for the State of Kansas Recovery Office. This includes updating their ARPA Excel tracker with new funding updates/timelines. She also helped with non-entitlement unit distribution reporting to the Treasury, the quarterly Office of Inspector General reports to the U.S. Treasury for Coronavirus Relief Funding and putting together their Homeowner Assistance Fund (HAF) program plan.

Grant Management Analyst, Executive Office of the Governor, Phoenix, AZ (2020 – 2021)

Katje was the lead grant management analyst focused on the financial aspect of grant programs for COVID-19 relief. She assisted the program team responsible for managing over \$2 billion in COVID-19 relief programs, resulting in the management and oversight of over 2,000 state-wide grantees. She provided financial grant management expertise to the Economic Recovery Management Team while managing a portfolio of 2,302 subrecipients. She also supported Arizona's response to and recovery from COVID-19 through the administration of the CARES Act and other Federal-covered funding. This included implementing new policies and procedures related to Federal and state grant management to facilitate awarding of COVID-19 relief dollars, including programs across the education, housing, healthcare, and small business domains. She also provided financial expertise throughout the grant lifecycle, including setting up vendors within the financial system, processing payments, and reconciling grant program financials. On average, she processed 100 grant payments a week.

Program Manager, Arizona Department of Administration, Phoenix, AZ (2019 – 2020)

Katje assisted in managing state-wide programs valued at \$20 million annually, including revamping the 9-1-1 program and leading agency-wide process improvement initiatives and workstreams to achieve critical program objectives. She assisted in managing the State 9-1-1 program, totaling \$18.4 million in awards each year; the program model included implementation of data-driven decisions, financial analysis and design, standardization of processes, and yearly management of 18 grantees. She also managed 18 subrecipients within the state enterprise grants management system, eCivis, to include monthly reimbursement requests, budget modifications, and closeout processes. She reconciled

KATJE BENOIT, PMP MANAGEMENT CONSULTANT II



YEARS OF EXPERIENCE

4 Years

EDUCATION

MA, Public Policy, Arizona State University

BS, Ecology and Field Biology, State University at New York, College at Oneonta

CERTIFICATION

Project Management Professional (PMP), No. 3774767, Project Management Institute, 2024

over 70 payments from the enterprise grants management system to the State enterprise financial system every month.

State Government Intern, Arizona Department of Administration Phoenix, AZ (2019)

Katje managed stakeholders' state agencies working to promote current grant availability and researched grant opportunities that matched stakeholder initiatives. She successfully awarded grants totaling \$10,000 for the Arizona State Exposition and Fair. She participated in a process improvement project with the Office of Continuous Improvement to redesign the 9-1-1 Program's invoice structure—the result was a reduction in staff time by 50% within three months. She also researched and documented processes for statewide grant policies within the Arizona Grant Management Manual.

Graduate Student Assistant/Teaching Assistant, Arizona State University, Tempe, AZ (2018 – 2019)

Katje assisted the Professor with the Microeconomics of Public Policy course design for two semesters during the 2018-2019 academic year. She graded students' assignments and provided feedback and, on average, answered 25 student questions every week.

Institutional and Policy Design Fellow, Arizona State University, Tempe, AZ (2017 – 2018)

Katje assisted with National Science Foundation-funded research projects that evaluated how scientists and policymakers work together to influence policies focusing on conservation. She analyzed nationwide policies regarding higher education, completed media scrapes, and wrote memos reviewed by senior staff of Arizona State University.

6. EXAMPLES

Proposal Number: Doc1677946894

Vendor: Witt O'Brien's, LLC

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:	U.S. Virgin Islands Malinda Vigilant-Messer 340-773-2244
Program:	Comprehensive Disaster Recovery Grants Management
Brief Description of Services Rendered:	<p>For the USVI Housing and Finance Authority (HFA), we developed the first Action Plan (approved by HUD), securing \$1.8 Billion in CDBG-DR funding for housing, infrastructure, and economic recovery project. With part of that funding, we helped design, implement, and oversee key programs that support rehabilitation and reconstruction for homeowners and renters while also making funding available for new construction of affordable and subsidized housing. This included aiding in the reconstruction and new development of housing for the most vulnerable, including temporary, emergency housing, and permanent supportive housing.</p> <p>Witt O'Brien's has been supporting the recovery efforts in the U.S. Virgin Islands following Hurricanes Irma and Maria in 2017. We have supported nearly 1,500 recovery projects across not only FEMA, HUD, and FHWA, but also Federal Transit Authority (FTA), Department of Interior (DOI), Natural Resource Conservation Service (NRCS), and Economic Development Authority (EDA). Highlights of our support across the major federal funding streams include FEMA PA, CDBG-DR, FHWA-ER, FEMA HMGP, FEMA STEP, and EDA.</p>

Example 2	
Client Name:	Town of Hope Mills, NC Ashley Wyatt, Town Clerk 910-424-4555; awyatt@townofhopemills.com
Program:	Grant Writing Services
Brief Description of Services Rendered:	<p>We initially engaged with the Town of Hope Mills through the NCLM. After applying to Assistance for Fire Fighters, Firehouse Subs, Safe Streets for All, and COPS hiring program, the Town contracted with us to provide additional grants applications support, application requests to the Cannon Charitable Foundation, Assistance to Firefighters Micro Grant, Building Resilient Infrastructure and Communities (BRIC), Gary Sinise Foundation, the Strengthen our Defenders Grant, and the Governor's Highway Safety program.</p>

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Example 3	
Client Name:	King County, WA Eben Sutton, Chief Accountant 206-477-4540; eben.sutton@kingcounty.gov
Program:	Post Award Grant Management, Audit, and Closeout Services
Brief Description of Services Rendered:	<p>Witt O'Brien's is engaged in a multi-year technical assistance and staff augmentation contract with King County providing post-award grant management, audit, and closeout of over \$1.37 billion in emergency, response, and recovery funding addressing the impacts of the pandemic (DR-4481).</p> <p>Primary funding streams include CARES Act, Coronavirus State and Local Fiscal Recovery Funds, Emergency Rental Assistance Program, and FEMA Public Assistance. The scaled engagement has allowed for the rightsizing of the services to the needs of King County, with as few as 4 staff and as many as 42 staff actively working on tasks in any given week.</p> <p>Services Witt O'Brien's has provided or is providing to the County include Technical Assistance, Staff Augmentation, Training and Capacity Building, and Monitoring, Closeout, and Audit-Readiness.</p>

7. COST PROPOSAL

Per the RFP instructions and response to QA 126, our cost proposal has been provided under separate attachment and uploaded into the portal in an excel file. For simplicity of evaluation and allow the maximum flexibility in pricing and skillsets, we have provided a single rate sheet for both onsite and remote support across all proposed tasks. Our pricing assumptions are outlined below:

Onsite Rates:

- Days are considered full eight (8) working hours
- Mileage is limited to 40 miles daily
- Travel onsite will be 2 weeks or less (at each instance)

Task 17 Environmental Review

- Assume Environmental Assessments, Environmental Impact Statements is limited to technical Assistance and process support is required.
- Low-Medium complexity is defined as properties less than 1 acre
- High complexity is defined as properties over 1 acre

8. ERRATA AND EXCEPTIONS

Witt O'Brien's has reviewed, understands, and agrees to the terms outlined in RFP Attachment C: North Carolina General Contract Terms and Conditions.

9. FINANCIAL INFORMATION

As a company with a deep history in disaster and emergency management, Witt O'Brien's has the experience and capability to maintain operations with financial backing that is critical during large-scale disasters. Our firm has approximately 500 employees, and our office serves as our headquarters in Houston, TX. Although our staff is located across the nation, they work remotely or on client sites. As a wholly owned subsidiary of Ambipar Holding USA, Inc.—which generates over \$1 billion in annual revenue—we possess the stability and resources of a larger firm, combined with the agility of a smaller one. We maintain a strong, geographically diverse client portfolio of over 550 actively billing clients, many of which have multi-year contracts, supporting recurring revenue. We do not have any bankruptcies, pending litigation, planned office closures, or impending mergers that may impede our ability to complete the project.

To meet the requirements of the RFP, **we provide links to our audited financial data for FY 2022 and FY 2023 below.** Furthermore, the internal financial statements for 2022 and 2023 are presented on the next page; a Statement of Good Standing from our bank concludes **Section 1.3.**

Audited Financial Data (2022, 2023, and 2024)

We provide the last three years of audited annual financial statements from our parent company here. These reports have been signed and certified as accurate by the third-party independent auditor BDO

RCS Auditores Independentes SS Ltda. Due to file size limitations, we provide these links for access to the reports:





Appendix A:

Full RFP

**INCLUDING EXECUTED
REQUIRED ATTACHMENTS**



ambipar^a

WITT O'BRIEN'S



**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

STATE OF NORTH CAROLINA <i>Division of Community Revitalization (DCR)</i>	
Refer ALL Inquiries regarding this RFP to: angela.dunaway@commerce.nc.gov	Request for Proposals # Doc1677946894
Using Agency: North Carolina Department of Commerce, Division of Community Revitalization	Proposals will be publicly opened: September 4, 2025, at 2:00 pm ET
	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: Witt O'Brien's, LLC		
STREET ADDRESS: 818 Town and Country Blvd., Suite 200	P.O. BOX:	ZIP:
CITY & STATE & ZIP: Houston, TX 77024	TELEPHONE NUMBER: 281-320-9796	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE :		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Cheryl Joiner, Director of Contracts and Compliance		FAX NUMBER: 281-320-9700
VENDOR'S AUTHORIZED SIGNATURE: 	DATE: 09/09/2025	EMAIL: contractrequests@wittobriens.com

Docusign Envelope ID: 4209A3B6-835B-443D-8FA2-D6C098DBDDE5

Proposal Number: Doc1677946894

Vendor: Witt O'Brien's, LLC

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).

Proposal Number: Doc1677946894

Vendor: Witt O'Brien's, LLC

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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."

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2.4 RFP SCHEDULE

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

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

2.5 RFP QUESTIONS

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

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

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

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

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

2.6 RFP SUBMITTAL

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

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Offers to be submitted through eProcurement Sourcing. For training on how to use eProcurement Sourcing, <https://eprocurement.nc.gov/training/vendor-training>. Questions or issues related to using eProcurement Sourcing must be directed to the eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM ET to 5:00 PM ET.

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

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

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

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

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

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

2.7 PROPOSAL CONTENTS

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

All pages of the RFP should be returned.

Proposal shall include the following components:

1. Title Page

The title page shall include:

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

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

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

3. **Table of Contents**

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

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

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

5. **Resumes and Bios**

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

6. **Examples**

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

2.8 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

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

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

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

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

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

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

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

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

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

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

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

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

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

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

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

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

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

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

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

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

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

3.4 EVALUATION CRITERIA

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

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

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

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

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

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

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

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

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

3.6 INTERPRETATION OF TERMS AND PHRASES

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

4.0 REQUIREMENTS

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

4.1 TASK ORDER CATEGORIES

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

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

TASK 2 – Financial Compliance, Oversight, and Fraud Prevention

TASK 3 – Duplication of Benefits (DOB) Compliance

TASK 4 – Procurement Compliance and Monitoring

TASK 5 – Claims, Appeals, and Case Reviews

TASK 6 – Action Plan Development and Amendments

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

TASK 8 – Program Performance Monitoring and Evaluation

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

TASK 10 – Audit Readiness and Monitoring Support

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

TASK 12 – Training, Technical Assistance, and Capacity Building

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

TASK 14 – Communication, Public Information, and Outreach Support

TASK 15 – Grant Management

TASK 16 – Technical Systems Specification & Project Management

TASK 17 – Environmental Review

4.2 PRICING

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

4.3 PAYMENT STRUCTURE

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

4.4 INVOICES

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

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

4.5 HUB PARTICIPATION

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

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

4.6 BACKGROUND CHECKS

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

4.7 PERSONNEL

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

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

4.8 VENDOR'S REPRESENTATIONS

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

4.9 INSURANCE REQUIREMENTS

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

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

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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.

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5.2 TASKS / DELIVERABLES

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

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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5.2.3 TASK 3 – Duplication of Benefits (DOB) Compliance

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

Anticipated Deliverables:

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

5.2.4 TASK 4 – Procurement Compliance and Monitoring

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

Anticipated Deliverables:

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

5.2.5 TASK 5 – Claims, Appeals, and Case Reviews

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

Anticipated Deliverables:

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

5.2.6 TASK 6 – Action Plan Development and Amendments

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

5.2.8 TASK 8 – Program Performance Monitoring and Evaluation

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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5.2.10 TASK 10 – Audit Readiness and Monitoring Support

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

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

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

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

Anticipated Deliverables:

- Relocation policies, procedures, SOPs, and workflows

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

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

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

Anticipated Deliverables:

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

5.2.15 TASK 15 – Grant Management

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

Anticipated Deliverables:

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

5.2.16 TASK 16 – Technical Systems Specification & Project Management

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

Anticipated Deliverables:

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

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.

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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**

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PRICING:

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

Per Q/A 126, this information has been provided under separate attachment and uploaded into the portal as an Excel File

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

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TASK ORDER CATEGORY	YEAR 1 HOURLY RATE	YEAR 2 HOURLY RATE	YEAR 3 HOURLY RATE
TASK 12 – Training, Technical Assistance, and Capacity Building			
<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.

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

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26. **STATE:** The State of North Carolina, including any of its sub-units recognized under North Carolina law.

27. **STATE AGENCY:** Any of the more than 400 sub-units within the executive branch of the State, including its departments, institutions, boards, commissions, universities, and units of the State.

28. **STATE DEPARTMENTS:** Department of Administration, Department of Agriculture and Consumer Services, Department of Commerce, Department of Natural and Cultural Resources, Department of Environmental Quality, Department of Health and Human Services, Department of Information Technology, Department of Insurance, Department of Justice, Department of Labor, Department of Military and Veteran Affairs, Department of Public Instruction, Department of Public Safety, Department of Revenue, Department of State Treasurer, Office of the Secretary of the State, Department of Transportation, Wildlife Resources Commission, Office of Budget and Management, Office of the Governor, Office of the Lieutenant Governor, Office of The State Auditor, Office of the State Controller.

29. **VENDOR:** The supplier, bidder, proposer, company, firm, corporation, partnership, individual or other entity submitting a response to a Solicitation document. Following award of a contract, the term refers to an entity receiving such an award.

30. **WORK:** All labor, materials, equipment, services, or property of any type, provided or to be provided by the Contractor to fulfill the Contractor's obligations under the Contract.

31. **YOU and YOUR:** Offeror.

V. INTERPRETATION OF TERMS AND PHRASES

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

VI. BID SUBMISSION

1. **VENDOR'S REPRESENTATIVE:** Each Vendor shall submit with its bid the name, address, and telephone number of the person(s) with authority to bind the Vendor and answer questions or provide clarification concerning the Vendor's bid.

2. **SIGNING YOUR OFFER:** Every Offer must be signed by an individual with actual authority to bind the Offeror.

a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm.

b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words by its Partner, and signed by a general partner.

c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign.

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

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

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

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

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

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

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

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

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

8. **CONTENTS OF OFFER:**

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

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

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

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

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

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

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

13. **INFORMATION AND DESCRIPTIVE LITERATURE:** Vendor shall furnish all information requested in the Solicitation document. Further, if required elsewhere in this bid, each Vendor shall submit with its bid any sketches, descriptive literature, and/or complete specifications covering the goods and services offered. Reference to literature submitted with a previous bid or available elsewhere will not satisfy this provision. Do not submit bid samples or descriptive literature unless expressly requested. Unsolicited bid samples or descriptive literature will not be examined or tested, will not be used to determine responsiveness, and will not be deemed to vary any of the provisions of the Solicitation. Failure 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.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

ATTACHMENT C: NORTH CAROLINA GENERAL CONTRACT TERMS & CONDITIONS

1. PERFORMANCE:

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

2. DEFAULT AND TERMINATION.

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

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

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

3. INTERPRETATION, CONFLICT OF TERMS.

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

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

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

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

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

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

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

7. SITUS AND GOVERNING LAWS:

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

8. NON-DISCRIMINATION COMPLIANCE:

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

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

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

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

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

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

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

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

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

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

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

13. ACCESS TO PERSONS AND RECORDS:

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

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v. Access and review

1. Any documents or records related to any contract awarded by a State agency, including the documents and records of the contractor, that the Commission determines will assist in verifying accounts or will contain data affecting fees or performance; and
2. Any records related to any subcontract of a contract awarded by a State agency that is utilized to fulfill the contract, including, but not limited to (i) records related to the drafting and approval of the subcontract, and (ii) documents and records of the contractor or subcontractor that the Commission determines will assist in verifying accounts or will contain data affecting fees or performance.

d) The Joint Legislative Commission on Governmental Operations has the power to:

- i. Compel access to any document or system of records held by a non-State entity receiving, directly or indirectly, public funds, to the extent the documents relate to the receipt, purpose or implementation of a program or service paid for with public funds.
 - ii. Compel attendance of any officer or employee of any non-State entity receiving public funds, provided the officer or employee is responsible for implementing a program or providing a service paid for with public funds.
- e) Unless prohibited by federal law, the Commission and Commission staff in the discharge of their duties under this Article shall be provided access to any building or facility owned or leased by a non-State entity receiving public funds provided (i) the building or facility is used to implement a program or provide a service paid for with public funds and (ii) the access is reasonably related to the receipt, purpose, or implementation of a program or service paid for with public funds.
- f) Any confidential information obtained by the Commission shall remain confidential and is not a public record as defined in G.S. 132-1.
- g) Any document or information obtained or produced by Commission staff in furtherance of staff's duties to the Commission is confidential and is not a public record as defined in G.S. 132-1.
- h) A person who conceals, falsifies, or refuses to provide to the Commission any document, information, or access to any building or facility as required by this Article with the intent to mislead, impede, or interfere with the Commission's discharge of its duties under this Article shall be guilty of a Class 2 misdemeanor.

14. ASSIGNMENT OR DELEGATION OF DUTIES.

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

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

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

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

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

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

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

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

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

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

16. GENERAL INDEMNITY:

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

17. ELECTRONIC PROCUREMENT:

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

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

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

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

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

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

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

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

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

27. FEDERAL FUNDS PROVISIONS

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

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

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

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

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

Compliance with the Contract Work Hours and Safety Standards Act.

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

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

Clean Air Act

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

Federal Water Pollution Control Act

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

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

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

f) Debarment and Suspension.

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

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

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

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

h) Procurement of Recovered Materials.

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

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

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

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

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

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

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

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

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

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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:

In addition to work performed in NC, remote work will be done from the following states:
AR, AZ, CA, CO, CT, FL, IN, NM, NY, MA, MI, SD, TN, TX, VA

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ATTACHMENT E: HISTORICALLY UNDERUTILIZED BUSINESSES INFORMATION

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

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

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

a) Is Vendor a Historically Underutilized Business? ☐ Yes ☒ No

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

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ATTACHMENT 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.

Docusign Envelope ID: 4209A3B6-835B-443D-8FA2-D6C098DBDDE5

DISCLOSURE OF LOBBYING ACTIVITIES

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

Approved by OMB
0348-0046

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant N/A <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance		2. Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award N/A		3. Report Type: <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change N/A For Material Change Only: year _____ quarter _____ date of last report _____	
4. Name and Address of Reporting Entity: <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, if known N/A Congressional District, if known: _____			5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime: N/A Congressional District, if known: _____		
6. Federal Department/Agency: N/A			7. Federal Program Name/Description: CFDA Number, if applicable: _____ N/A		
8. Federal Action Number, if known: N/A			9. Award Amount, if known: \$ _____ N/A		
10. a. Name and Address of Lobbying Registrant (if individual, last name, first name, MI): N/A			b. Individuals Performing Services (including address if different from No. 10a) (last name, first name, MI): N/A		
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.			Signature: _____ Print Name: <u>Cheryl Joiner</u> Title: <u>Director of Contracts and Compliance</u> Telephone No.: <u>281-320-9796</u> Date: <u>09/09/2022</u>		
Federal Use Only:					Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

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INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

Proposal Number: Doc1677946894

Vendor: Witt O'Brien's, LLC

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:	U.S. Virgin Islands Malinda Vigilant-Messer 340-773-2244
Program:	Comprehensive Disaster Recovery Grants Management
Brief Description of Services Rendered:	<p>Witt O'Brien's has been supporting the recovery efforts in the U.S. Virgin Islands following Hurricanes Irma and Maria in 2017. We have supported nearly 1,500 recovery projects across not only FEMA, HUD, and FHWA, but also Federal Transit Authority (FTA), Department of Interior (DOI), Natural Resource Conservation Service (NRCS), and Economic Development Authority (EDA). Highlights of our support across the major federal funding streams include FEMA PA, CDBG-DR, FHWA-ER, FEMA HMGP, FEMA STEP, and EDA.</p> <p>For the USVI Housing and Finance Authority (HFA), we developed the first Action Plan (approved by HUD), securing \$1.8 Billion in CDBG-DR funding for housing, infrastructure, and economic recovery project. With part of that funding, we helped design, implement, and oversee key programs that support rehabilitation and reconstruction for homeowners and renters while also making funding available for new construction of affordable and subsidized housing. This included aiding in the reconstruction and new development of housing for the most vulnerable, including temporary, emergency housing, and permanent supportive housing.</p>

Example 2	
Client Name:	Town of Hope Mills, NC Ashley Wyatt, Town Clerk 910-424-4555; awyatt@townofhopemills.com
Program:	Grant Writing Services
Brief Description of Services Rendered:	<p>We initially engaged with the Town of Hope Mills through the NCLM. After applying to Assistance for Fire Fighters, Firehouse Subs, Safe Streets for All, and COPS hiring program, the Town contracted with us to provide additional grants applications support, application requests to the Cannon Charitable Foundation, Assistance to Firefighters Micro Grant, Building Resilient Infrastructure and Communities (BRIC), Gary Sinise Foundation, the Strengthen our Defenders Grant, and the Governor's Highway Safety program.</p>

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Example 3	
Client Name:	King County, WA Eben Sutton, Chief Accountant 206-477-4540; eben.sutton@kingcounty.gov
Program:	Post Award Grant Management, Audit, and Closeout Services
Brief Description of Services Rendered:	<p>Witt O'Brien's is engaged in a multi-year technical assistance and staff augmentation contract with King County providing post-award grant management, audit, and closeout of over \$1.37 billion in emergency, response, and recovery funding addressing the impacts of the pandemic (DR-4481).</p> <p>Primary funding streams include CARES Act, Coronavirus State and Local Fiscal Recovery Funds, Emergency Rental Assistance Program, and FEMA Public Assistance. The scaled engagement has allowed for the rightsizing of the services to the needs of King County, with as few as 4 staff and as many as 42 staff actively working on tasks in any given week.</p> <p>Services Witt O'Brien's has provided or is providing to the County include Technical Assistance, Staff Augmentation, Training and Capacity Building, and Monitoring, Closeout, and Audit-Readiness.</p>

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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.



ambipar 
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