



Fort Myers Beach Town Council

Town Hall “Base Camp”
2545 Estero Blvd.
Fort Myers Beach, FL 33931

Agenda

Monday, November 21, 2022

9:00 AM

ORDER OF BUSINESS

- I. CALL TO ORDER
- II. INVOCATION
- III. PLEDGE OF ALLEGIANCE
- IV. APPROVAL OF FINAL AGENDA
- V. PUBLIC COMMENT
- VI. LOCAL ACHIEVEMENTS AND RECOGNITIONS
- VII. CONSENT AGENDA
 - A. Resolution 22-39; Certification of 2022 Election
Resolution 22-39; Certifying the results of the Town of Fort Myers Beach General Election on November 8, 2022 for Town Council Seats One and Two.
- VIII. ADMINISTRATIVE AGENDA
 - A. Town Manager
**Roger Hernstadt
H2 Solutions, LLC**
 - B. 2023 Meeting Schedule
Approve the monthly schedule for Town Council meetings for calendar year 2023
 - C. Local Planning Agency appointment
Appointment to the Local Planning Agency (LPA)
 - D. RFP-23-01-AD: Disaster Recovery Consultant Services
Approve the Selection Advisory Committee's recommendation in response to RFP-23-01-AD, Disaster Recovery Consultant Services, and authorize the Town Manager to negotiate and execute an agreement

with Hagerty Consulting, Inc.

E. Permitting Fees

A discussion regarding the waiving of permit fees

IX. FINAL PUBLIC COMMENT

X. TOWN MANAGER'S ITEMS

A. Year End Financial Report

XI. TOWN ATTORNEY'S ITEMS

XII. COUNCILMEMBERS ITEMS AND REPORTS

A. Outside Committee Designations

Designation of a Council representative and alternate to the seven outside committees on which Council members have previously served.

B. Council Representation to Town Advisory Committees

Designation of a Council representative to the six Town advisory boards/committees.

XIII. ADJOURNMENT

NOTE: THIS MEETING STREAMED LIVE ON YOUTUBE.

IF A PERSON DECIDES TO APPEAL A DECISION MADE BY THE COUNCIL IN ANY MATTER CONSIDERED AT THIS MEETING/HEARING, SUCH PERSONS MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDING IS MADE, TO INCLUDE THE TESTIMONY AND EVIDENCE UPON WHICH ANY SUCH APPEAL IS TO BE BASED.



**For special accommodations,
please notify the Town Clerk's
Office at least 72 hours in
advance. (239) 765-0202**

In accordance with the Americans with Disabilities Act (ADA), persons needing a special accommodation to participate in the Board's proceedings should contact the Town Clerk's Office not later than three days prior to the proceedings.

1. Requested Motion:

Meeting Date: November 21, 2022

Resolution 22-39; Certifying the results of the Town of Fort Myers Beach General Election on November 8, 2022 for Town Council Seats One and Two.

Why the action is necessary:

This action follows the election requirements of the Town Charter.

What the action accomplishes:

This action effectuates the Town election of November 8, 2022, as required by the Town Charter.

2. Agenda:

CONSENT AGENDA

3. Requirement/Purpose:

4. Submitter of Information:

5. Background:

This Resolution certifies the results of the 2022 election.

Attachments:

1. 20-39, Resolution Certifying 2022 Election Results
2. 11-08-22 OFFICIAL RESULTS_NP CAND_CB signed Certificate
3. 11-08-22 Town FMB_OFFICIAL_CAND_CB signed Certificate

Financial Impact:

6. Alternative Action

There is no alternative action which is compliant with the Town Charter.

7. Management Recommendations:

8. Recommended Approval:

Amy Baker, Town Clerk
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk

Created/Initiated - 11/18/2022
Approved - 11/18/2022
Final Approval - 11/18/2022

RESOLUTION NUMBER 20-12

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF FORT MYERS BEACH, FLORIDA, CERTIFYING THE RESULTS OF THE 2022 TOWN ELECTION FOR SEATS ONE AND TWO; DETERMINING COUNCILMEMBER SEAT ASSIGNMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, Article VIII, Section 2 of the State Constitution and Chapter 166, *Florida Statutes* provide that municipalities have the governmental, corporate, and proprietary powers to conduct municipal government, perform municipal functions, render municipal services, and exercise any power for municipal purposes, except when expressly prohibited by law; and

WHEREAS, Article X of the Fort Myers Beach Town Charter empowers the Town Council to adopt, amend, or repeal such ordinances and resolutions as may be required for the proper governing of the Town; and

WHEREAS, the Town Charter requires periodic elections for membership on the Town Council; and

WHEREAS, pursuant to the above authority, the Town Council called an election in the Town of Fort Myers Beach, which was duly held on November 8, 2022, for the purpose of having all the qualified electors within the Town determine the members of the Town Council for seats #1 and #2; and

NOW, THEREFORE, IT IS RESOLVED BY THE TOWN COUNCIL OF FORT MYERS BEACH, FLORIDA THAT:

Section 1. The above recitals are true and correct and are hereby incorporated by reference as though fully set forth herein.

Section 2. The Lee County Canvassing Board has canvassed the ballots and certified same to the Lee County Supervisor of Elections (“SOE”); and, the SOE has in turn, certified the election results to the Town Council of the Town of Fort Myers Beach, Florida. The Town Council accepts and certifies the results of the election as provided by the SOE.

Section 3. The votes received by the candidates for Councilmember Seats 1 and 2 are as follows (Exhibit “A”).

<u>NAME</u>	<u>NUMBER OF VOTES</u>
John R. King	1,132
Ray Murphy	1,080
Patrick J. Romcoe	639
Karen Woodson	1,482

Section 4. In accordance with Town Charter Section 4.01 (b) “assignment of open seat numbers shall be alphabetically by incoming Council Members’ last names” and declares John R. King elected as Council member for **Seat #1** and Karen Woodson elected as Councilmember for **Seat #2**.

Section 7. This Resolution shall take effect immediately upon adoption.

The foregoing Resolution was adopted by the Town Council upon a motion by _____ and seconded by _____, and upon being put to a vote, the result was as follows:

Dan Allers, Mayor
Jim Atterholt, Vice Mayor
John R. King, Councilmember
Bill Veach, Councilmember
Karen Woodson, Councilmember

ADOPTED this 21st day of November, 2022 by the Town Council of the Town of Fort Myers Beach, Florida.

TOWN OF FORT MYERS BEACH

Dan Allers, Mayor

ATTEST:

Amy Baker, Town Clerk

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE
AND RELIANCE OF THE TOWN OF FORT MYERS BEACH ONLY:

John R. Herin, Jr., Town Attorney

This Resolution was filed in the Office of the Town Clerk on this ____ day of November 2022.

*** Official Results ***
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

We, the undersigned, ERIK LEONTIEV, Lee County Judge, RAYMOND SANDELLI, Lee County Commissioner, TOMMY DOYLE, Lee County Supervisor of Elections, constituting the Board of County Canvassers in and for said County, do hereby certify that we met on the Eighteenth day of November, 2022 A.D., and proceeded publicly to canvass the votes given for the several offices and persons herein specified at the **Nonpartisan** held on the Eighth day of November, 2022 A.D., as shown by the returns on file in the office of the Supervisor of Elections. We do hereby certify from said returns as follows:

Retention of Justice Charles T. Canady of the Supreme Court

Yes 162,473 votes
No 67,076 votes

Retention of Justice John D. Couriel of the Supreme Court

Yes 163,413 votes
No 63,467 votes

Retention of Justice Jamie Grosshans of the Supreme Court

Yes 162,404 votes
No 62,887 votes

Retention of Justice Jorge Labarga of the Supreme Court

Yes 152,215 votes
No 72,648 votes

Retention of Justice Ricky Polston of the Supreme Court

Yes 155,042 votes
No 68,732 votes

Retention of Judge Patricia Joan Kelly of the Second District Court of Appeal

Yes 158,871 votes
No 61,977 votes

Retention of Judge Nelly N. Khouzam of the Second District Court of Appeal

Yes 156,917 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

No 61,043 votes

Retention of Judge Suzanne Y. Labrit of the Second District Court of Appeal

Yes 161,204 votes
No 55,679 votes

Retention of Judge Matt Lucas of the Second District Court of Appeal

Yes 158,237 votes
No 57,804 votes

Retention of Judge Robert Morris of the Second District Court of Appeal

Yes 147,444 votes
No 67,638 votes

Retention of Judge Stevan Travis Northcutt of the Second District Court of Appeal

Yes 140,512 votes
No 73,913 votes

Retention of Judge John K. Stargel of the Second District Court of Appeal

Yes 156,416 votes
No 57,757 votes

Retention of Judge Craig C. Villanti of the Second District Court of Appeal

Yes 148,950 votes
No 64,458 votes

For School Board, District 1, the whole number of votes cast was 51,078 of which

Kathy Fanny	received	24,644 votes
Sam Fisher	received	26,434 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For School Board, District 4, the whole number of votes cast was 35,503
of which

Debbie Jordan	received	19,732 votes
Dan Severson	received	15,771 votes

For School Board, District 6, the whole number of votes cast was
216,337 of which

Jada Langford Fleming	received	111,480 votes
Denise Nystrom	received	104,857 votes

For City of Bonita Springs City Council District 1, the whole number of
votes cast was 3,628 of which

Jamie Bogacz	received	2,184 votes
Eric S. Olson	received	1,444 votes

For City of Bonita Springs City Council District 3, the whole number of
votes cast was 3,410 of which

Steven Blumrosen	received	491 votes
Laura Carr	received	1,179 votes
Ruth Condit	received	1,056 votes
Ron George	received	684 votes

For City of Bonita Springs City Council District 5, the whole number of
votes cast was 1,959 of which

Nigel Patrick Fullick	received	1,265 votes
Jude Richvale	received	694 votes

For City of Cape Coral Mayor, the whole number of votes cast was
62,706 of which

John Gunter	received	38,299 votes
Tom Shadrach	received	24,407 votes

For City of Cape Coral City Council District 1, the whole number of
votes cast was 57,207 of which

Carol Rae Culliton	received	24,462 votes
Bill Steinke	received	32,745 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For City of Cape Coral City Council District 4, the whole number of votes cast was 55,778 of which

Patty L. Cummings	received	28,389 votes
Jennifer I. Nelson	received	27,389 votes

For City of Cape Coral City Council District 6, the whole number of votes cast was 53,882 of which

Wayne Hecht	received	25,615 votes
Keith Long	received	28,267 votes

For City of Fort Myers Mayor, the whole number of votes cast was 22,946 of which

Kevin B. Anderson	received	18,220 votes
David Ruffin	received	4,726 votes

For City of Fort Myers City Council Ward 1, the whole number of votes cast was 1,799 of which

Teresa Watkins Brown	received	1,257 votes
Martin Byrd	received	542 votes

For City of Fort Myers City Council Ward 3, the whole number of votes cast was 2,154 of which

Chantel Rhodes	received	948 votes
Terolyn P. Watson	received	1,206 votes

For Town of Fort Myers Beach Town Council Seats, the whole number of votes cast was 4,333 of which

John R. King	received	1,132 votes
Ray Murphy	received	1,080 votes
Patrick J. Romcoe	received	639 votes
Karen Woodson	received	1,482 votes

For Lehigh Acres Municipal Services Improvement District, Seat 2, the whole number of votes cast was 16,298 of which

Julie Camp	received	8,391 votes
David Deetscreek	received	5,681 votes
David A. Lenahan II	received	2,226 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For Lehigh Acres Municipal Services Improvement District, Seat 4, the whole number of votes cast was 16,416 of which

Mike Bonacolta	received	8,303 votes
Tim Cooley	received	4,733 votes
Chris Sola-Martinez	received	3,380 votes

For Bonita Springs Fire Control and Rescue District, Seat 1, the whole number of votes cast was 16,683 of which

Ed Bradford	received	7,394 votes
James P. Murphy	received	9,289 votes

For Bonita Springs Fire Control and Rescue District, Seat 5, the whole number of votes cast was 16,092 of which

Tommy Hugo	received	8,742 votes
Lawrence P. Kosilla Jr	received	7,350 votes

For Cypress Shadows Community Development District, Seat 2, the whole number of votes cast was 473 of which

Scott Faden	received	161 votes
Donald E. Lozzi	received	312 votes

For Lee Memorial Health System Board of Directors, District 3, the whole number of votes cast was 195,671 of which

David H. Klein	received	135,518 votes
Bill Ribble	received	60,153 votes

For Lee Memorial Health System Board of Directors, District 4 (Vote for 2), the whole number of votes cast was 300,865 of which

Dane Allen	received	84,265 votes
Randy Allen-Scott	received	58,854 votes
Diane Champion	received	88,984 votes
Mary Clouse	received	68,762 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For Lehigh Acres Fire Control and Rescue District, Seat 2, the whole number of votes cast was 15,869 of which

Linda R. Carter	received	10,447 votes
Taruas Anthony Pugh	received	3,578 votes
Moe Yasin	received	1,844 votes

For Lehigh Acres Fire Control and Rescue District, Seat 5, the whole number of votes cast was 15,772 of which

Cia Gomez-Sherman	received	8,149 votes
Tyler Woodby	received	7,623 votes

For Lucaya Community Development District, Seat 4, the whole number of votes cast was 151 of which

Robert Edward Davis	received	69 votes
Fred Wiemer	received	82 votes

For Lucaya Community Development District, Seat 5, the whole number of votes cast was 152 of which

Theresa Cleland	received	62 votes
Mark E. Fitzgerald	received	90 votes

For Matlacha/Pine Island Fire Control District, Seat 4, the whole number of votes cast was 3,548 of which

John E. Cammick	received	2,215 votes
Ara Hagopian	received	340 votes
Gary L. Stone	received	993 votes

For Moody River Estates Community Development District, Seat 1, the whole number of votes cast was 637 of which

Juliann Canoura	received	192 votes
Chris Jenner	received	445 votes

For Moody River Estates Community Development District, Seat 5, the whole number of votes cast was 631 of which

Omar Abdoe	received	125 votes
William F. Krukowski	received	266 votes
Steven Laliberte	received	240 votes

***** Official Results *****
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For Paseo Community Development District, Seat 1, the whole number of votes cast was 598 of which

David W. Cabell	received	404 votes
Bill Kirrane	received	194 votes

For Paseo Community Development District, Seat 2, the whole number of votes cast was 584 of which

Debra S. Johnson	received	376 votes
James J. Morris	received	208 votes

For River Hall Community Development District, Seat 4, the whole number of votes cast was 1,264 of which

Douglas Mitro	received	416 votes
Robert Stark	received	848 votes

For River Hall Community Development District, Seat 5, the whole number of votes cast was 1,286 of which

Daniel J. Block	received	711 votes
Bob Lorenzen	received	575 votes

For Sanibel Public Library District, Seat 2, the whole number of votes cast was 2,584 of which

Susan Holly	received	1,984 votes
Chelsea F. Sweiss	received	600 votes

For Sanibel Public Library District, Seat 5, the whole number of votes cast was 2,526 of which

Barbara Ruben	received	1,788 votes
Jude Sincoskie	received	738 votes

For Sanibel Public Library District, Seat 7, the whole number of votes cast was 2,624 of which

Roy Gibson	received	1,785 votes
Richard Dylan Murphy	received	839 votes

*** Official Results ***
CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY

For South Trail Fire Protection and Rescue Service District, Seat 1, the whole number of votes cast was 16,215 of which

A. Kenneth Brown Jr	received	9,459 votes
Alycia Wolfe	received	6,756 votes

For Tice Fire Protection and Rescue Service District, Seat 5, the whole number of votes cast was 3,028 of which

James H. Burgess	received	2,334 votes
Rudy Naranjo	received	694 votes

For Upper Captiva Fire Protection and Rescue Service District, Seat 1, the whole number of votes cast was 66 of which

William R. Fry	received	36 votes
Thomas Jenkins	received	30 votes

For Upper Captiva Fire Protection and Rescue Service District, Seat 2, the whole number of votes cast was 66 of which

Van Hammond	received	40 votes
A.J. LaVallie	received	26 votes

We Certify that pursuant to Section 102.112, Florida Statutes, the canvassing board has compared the number of persons who voted with the number of ballots counted and that the certification includes all valid votes cast in the election.



LEE COUNTY JUDGE



LEE COUNTY COMMISSIONER



LEE COUNTY SUPERVISOR OF ELECTIONS

****Official Results****

CERTIFICATE OF COUNTY CANVASSING BOARD
LEE COUNTY
MUNICIPAL ELECTION HELD IN CONJUNCTION WITH THE
GENERAL ELECTION
TOWN OF FORT MYERS BEACH REGULAR ELECTION
November 8, 2022

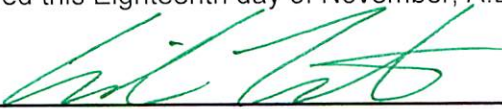
State of Florida, County of Lee
Town of Fort Myers Beach

We, the undersigned, ERIK LEONTIEV, County Judge, RAYMOND SANDELLI, County Commissioner, and, TOMMY DOYLE, Supervisor of Elections, constituting the Board of County Canvassers in and for said City, do hereby certify that we met on the Eighteenth day of November, A.D., 2022 and proceeded publicly to canvass the votes given for the offices and persons herein specified at the **Town of Fort Myers Beach, Regular Election** held on the Eighth day of November, A.D., 2022, as shown by the returns on file in the office of the Supervisor of Elections. We do hereby certify from said returns as follows:

For Town of Fort Myers Beach, Town Council, the whole number of votes cast was 4,333
of which:

John R. King (NON)	received	<u>1,132</u>	votes
Ray Murphy (NON)	received	<u>1,080</u>	votes
Patrick J. Romcoe (NON)	received	<u>639</u>	votes
Karen Woodson (NON)	received	<u>1,482</u>	votes

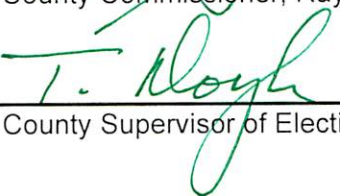
Signed this Eighteenth day of November, A.D., 2022:



Lee County Judge, Erik Leontiev



Lee County Commissioner, Raymond Sandelli



Lee County Supervisor of Elections, Tommy Doyle



1. **Requested Motion:**

Roger Hernstadt
H2 Solutions, LLC

Meeting Date: November 21, 2022

Why the action is necessary:

What the action accomplishes:

2. **Agenda:**

ADMINISTRATIVE AGENDA

3. **Requirement/Purpose:**

4. **Submitter of Information:**

5. **Background:**

Attachments:

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk

Created/Initiated - 11/17/2022

1. **Requested Motion:**

Meeting Date: November 21, 2022

Approve the monthly schedule for Town Council meetings for calendar year 2023

Why the action is necessary:

Assist to prepare calendar for the upcoming months

What the action accomplishes:

2. **Agenda:**

ADMINISTRATIVE AGENDA

3. **Requirement/Purpose:**

Other

4. **Submitter of Information:**

5. **Background:**

Town Council establishes its meeting schedule each year.

Attachments:

1. PROPOSED 2022-2023 Town Council Meeting

Financial Impact:

None

6. **Alternative Action**

Select alternative dates.

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk

Created/Initiated - 11/18/2022
Approved - 11/18/2022
Final Approval - 11/18/2022



2022/2023 Town Council Meeting Schedule

<u>NOVEMBER 2022</u>		
Monday, November 21, 2022	9:00 a.m.	Regular Town Council meeting
Monday, November 28, 2022	9:00 a.m.	Regular Town Council meeting
<u>DECEMBER 2022</u>		
Monday, December 5, 2022	9:00 a.m.	Regular Town Council meeting
Monday, December 12, 2022	9:00 a.m.	Management & Planning Session
<u>JANUARY 2023</u>		
Monday, January 9, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, January 12, 2023	9:00 a.m.	Management & Planning Session
Monday, January 23, 2023	9:00 a.m.	Regular Town Council meeting
<u>FEBRUARY 2023</u>		
Monday, February 6, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, February 9, 2023	9:00 a.m.	Management & Planning Session
Tuesday, February 21, 2023	9:00 a.m.	Regular Town Council meeting
<u>MARCH 2023</u>		
Monday, March 6, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, March 9, 2023	9:00 a.m.	Management & Planning Session
Monday, March 20, 2023	9:00 a.m.	Regular Town Council meeting
<u>APRIL 2023</u>		
Monday, April 3, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, April 6, 2023	9:00 a.m.	Management & Planning Session
Monday, April 17, 2023	9:00 a.m.	Regular Town Council meeting
<u>MAY 2023</u>		
Monday, May 1, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, May 4, 2023	9:00 a.m.	Management & Planning Session
Monday, May 15, 2023	9:00 a.m.	Regular Town Council meeting
<u>JUNE 2023</u>		
Monday, June 5, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, June 8, 2023	9:00 a.m.	Management & Planning Session
Tuesday, June 20, 2023	9:00 a.m.	Regular Town Council meeting
<u>AUGUST 2023</u>		
Monday, August 7, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, August 10, 2023	9:00 a.m.	Management & Planning Session
Monday, August 21, 2023	9:00 a.m.	Regular Town Council meeting
<u>SEPTEMBER 2023</u>		
meeting dates/times TBD based on DOR requirements for millage and budget		
<u>OCTOBER 2023</u>		
Monday, October 2, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, October 5, 2023	9:00 a.m.	Management & Planning Session
Monday, October 16, 2023	9:00 a.m.	Regular Town Council meeting
<u>NOVEMBER 2023</u>		
Monday, November 6, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, November 9, 2023	9:00 a.m.	Management & Planning Session
Monday, November 20, 2023	9:00 a.m.	Regular Town Council meeting
<u>DECEMBER 2023</u>		
Monday, December 4, 2023	9:00 a.m.	Regular Town Council meeting
Thursday, December 7, 2023	9:00 a.m.	Management & Planning Session
Monday, December 18, 2023	9:00 a.m.	Regular Town Council meeting

1. **Requested Motion:**

Meeting Date: November 21, 2022

Appointment to the Local Planning Agency (LPA)

Why the action is necessary:

Fills open positions on Advisory boards

What the action accomplishes:

2. **Agenda:**

ADMINISTRATIVE AGENDA

3. **Requirement/Purpose:**

Other

4. **Submitter of Information:**

5. **Background:**

The Local Planning Agency currently has one vacancy on their 7 member committee. Two Fort Myers Beach residents are requesting to be appointed to the vacant seat.

Attachments:

1. Boan, James
2. Romcoe, Patrick

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk

Created/Initiated - 11/15/2022
Approved - 11/15/2022
Final Approval - 11/17/2022



Raid
11-14-22

Town of Fort Myers Beach Advisory Boards and Committees Application

Complete one form for each application/committee appointment. Your application will be a public record subject to disclosure on request.

Please type or print clearly. Do not leave blanks.

Today's Date:

11/12/22

Name:

BOAN

JAMES

S

Last

First

Middle initial

Telephone Number:

630-284-0022

Email Address:

JBOAN3@COMCAST.NET

Home Address:

21267 SAINT PETERS

Mailing Address

(if different from home address):

Are you currently serving on any of the Town's committees? Yes ☐ No ☒

If yes, which committee(s)?

LOCAL PLANNING AGENCY

If yes, when is your term expiration?

I am applying for appointment to: (Check one)

- ☐ Anchorage Advisory Committee
- ☐ Audit Committee
- ☐ Bay Oaks Recreational Campus Advisory Board
- ☐ Community Resource Advisory Board
- ☐ Cultural and Environmental Learning Center Advisory Board
- ☐ Historic Preservation Advisory Committee
- ☒ Local Planning Agency
- ☐ Marine and Environmental Resources Task Force
- ☐ Nuisance Abatement Board
- ☐ Public Safety Committee

Have you been convicted of a felony, an offense involving moral turpitude while in office?

Yes ☐ No ☒

Do you have unpaid fines or liens due the Town?

Yes ☐ No ☒

Are you a registered voter within the Town's jurisdiction?

Yes ☒ No ☐

Are you a resident within the Town's jurisdiction?

Yes ☒ No ☐

Are you an owner of real property within the Town's jurisdiction?

Yes ☒ No ☐

Are you currently serving on a board, authority, committee or commission for another governmental agency?

Yes ☐ No ☒

If yes, what board, etc., and since when?

Why are you seeking appointment to this board or committee?

I BRING YEARS OF EXPERIENCE IN LOCAL GOVERNMENT AND DEVELOPMENT WITH ME AND WOULD LIKE TO BE PART OF RE-BUILDING FORT MYERS BEACH.

Community Involvement:

AS A RECENT RESIDENT MY INVOLVEMENT HAS BEEN LIMITED, DUE TO THE HURRICANE, I HAVE BEEN INVOLVED IN CHAMBERS OF COMMERCE, LOCAL COUNCILS OF GOVERN., ETC.

Interests / Activities:

I'M INTERESTED IN SEEING FORT MYERS BEACH FLOURISH AGAIN, I ENJOY WALKING THE BEACH, BIKING, PICKLEBALL AT THE REC. CENTER, MOUND HOUSE + LOVER'S KEY

You may attach a resume in addition to the above information. BIO ATTACHED

Do you qualify for Special Exemptions per § 119.071(4)(d)3., F.S.

Yes ☐ No ☒

If yes, fill out Public Records Exemption Request form and submit with the application.

I swear or affirm that all information on this form is true and accurate.

Signed James Boan

Date

11/12/22

Please return this form to the Town Clerk's Office, Town of Fort Myers Beach, 2525 Estero Boulevard, Fort Myers Beach, FL 33931 Amy@fmbgov.com

Office Use Only:

Appointed: Yes _____ No _____

DATE: _____

BIO from THE LAST firm I WAS WITH

JAMES S. BOAN (OF COUNSEL)

James Boan brings nearly 45 years of public service to the Odelson & Sterk, Ltd. team. He earned his undergraduate degree from the University of Illinois at Urbana-Champaign in 1973, his Master's Degree from George William College in 1978, and his Juris Doctorate from Northern Illinois University College of Law in 1983. He is admitted to practice in the U.S. District Court for the Northern District of Illinois.

Early in his career, Jim held Superintendent and Director positions with the Bolingbrook Park District. He served as Village Administrator and then Chief of Staff in Bolingbrook from 1997 until 2001 when he became Village Attorney, a position he has held for nearly 20 years. As Village Attorney, his practice focuses on local governmental matters, real estate, finance and taxation, and planning, zoning, annexation and land use.

Jim is active in the Will County Governmental League and the Illinois Municipal League Home Rule Attorneys Committee.

He is a member of the Illinois State Bar Association and was the former Chairman of the Kendall County Board. In April 2011, the Bolingbrook Park District formally dedicated 27 acres of open woodlands as the James S. Boan Woods at the Hidden Oak Conservation Area in Bolingbrook in recognition of his many years of public service. Recently, Jim was awarded the Bolingbrook Chamber of Commerce Lifetime Achievement Award.

He joins the firm as Of Counsel where he will provide consultation on local government, finance, land use, zoning, and economic development matters.



Town of Fort Myers Beach
Advisory Boards and Committees Application

Complete one form for each application/committee appointment. Your application will be a public record subject to disclosure on request.

Please type or print clearly. Do not leave blanks.

Today's Date: 11/12/2022

Name: Romcoe Patric L
Last First Middle initial

Telephone Number: 239-766-0220

Email Address: Romcoe@gmail.com

Home Address: 21581 WIDGEDIN TER FMB FL. 33931

Mailing Address 21581 WIDGEDIN TER FMB FL. 33931

(if different from home address):

Are you currently serving on any of the Town's committees? Yes ☐ No ☒

If yes, which committee(s)?

If yes, when is your term expiration?

I am applying for appointment to: (Check one)

- ☐ Anchorage Advisory Committee
- ☐ Audit Committee
- ☐ Bay Oaks Recreational Campus Advisory Board
- ☐ Community Resource Advisory Board
- ☐ Cultural and Environmental Learning Center Advisory Board
- ☐ Historic Preservation Advisory Committee
- ☒ Local Planning Agency
- ☐ Marine and Environmental Resources Task Force
- ☐ Nuisance Abatement Board
- ☐ Public Safety Committee

Have you been convicted of a felony, an offense involving moral turpitude while in office? Yes ☐ No ☒

Do you have unpaid fines or liens due the Town? Yes ☐ No ☒

Are you a registered voter within the Town's jurisdiction? Yes ☒ No ☐

Are you a resident within the Town's jurisdiction?

Yes ☒ No ☐

Are you an owner of real property within the Town's jurisdiction?

Yes ☐ No ☒

Are you currently serving on a board, authority, committee or commission for another governmental agency?

Yes ☐ No ☒

If yes, what board, etc., and since when?

Why are you seeking appointment to this board or committee?

AS A RESIDENT OF THE TOWN I WOULD LIKE TO
BE ON THE ADVISORY COMMITTEE TO THE ADVANCEMENT
OF THE TOWN AND REBUILD OF THE FUTURE OF FMB.

Community Involvement:

ACTIVE MEMBER, CANDIDATE FOR TOWN COUNCIL.
27 YEARS COMMUNITY SERVICE IN SCOUTING AS AN ADULT
LEADER IN MY COMMUNITY.

Interests / Activities:

LOCAL GOVERNMENT, BEACH LIFE, GOLF CHAMPIONSHIPS.

You may attach a resume in addition to the above information.

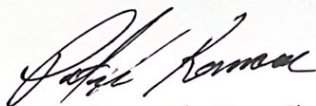
Do you qualify for Special Exemptions per § 119.071(4)(d)3., F.S.

Yes ☐ No ☒

If yes, fill out Public Records Exemption Request form and submit with the application.

I swear or affirm that all information on this form is true and accurate.

Signed



Date

11/12/22

Please return this form to the Town Clerk's Office, Town of Fort Myers Beach, 2525 Estero Boulevard,
Fort Myers Beach, FL 33931 Amy@fmbgov.com

Office Use Only:

Appointed: Yes _____ No _____

DATE: _____

SELF-DRIVEN-PROVEN PERFORMER

Objective:

Teaching Social Science/ELA and coaching at the high school level and having the ability to relocate from Chicago Illinois.

EDUCATION

Master of Arts & Science Education Teaching Certification - University of Phoenix 2011
Bachelor of Arts & Science - Western Illinois University Political Science/English 2001

TEACHING EXPERIENCE

ELA Teacher Dunbar High School Fort Myers Florida

- English Language Arts, teaching 10th grade, creating lesson plans and outlines for the course work using competency grading techniques and independent student monitoring.
- Working and Teaching 152 Students in the District curriculum and part of the Teacher collaboration team.

Summer School Teacher Lincoln Way East and Lincoln Way West 3 years Substitute Teaching.

- Western Civilization freshman class 32 students
- Economics Junior class 18 students

COACHING EXPERIENCE

Golf Coach Lincoln Way East Fresh/Soph and Varsity

- Worked as an Assistant Golf Coach for the Fesh/Soph Team and was the Assistant technical coach for the Varsity Team for three seasons.
- Technical advisor for the team and students in summer classes and instruction.

Baseball/Football Coach for youth football Frankfort Illinois

- Assistant coach for Baseball ages 7-14
- Football coach youth 7-12 along with league volunteer assistant coordinator.

YOUTH SPORTING EXPERIENCE

Award-winning Gymnast 10 years of competitive all-around circuit.
Diving, Swimming, Baseball, Football, and golf.

VOLUNTEER EXPERIENCE

Boy Scouts of America 40 years of service

- Council Camp Staff Trainer (12 years)
- Owasippe Scout Reservation Summer Camp Staff (12 years) Area Director
 - Life Guard instructor, First Aid instructor, NRA Shooting instructor
- Council Adult Training instructor (14 years)
- Scoutmaster Troop 465 (6 Years)
- Cub Master Pack 3465 (3 Years)
- Assistant Scout Master Troop 465 (21 years)

YMCA WEST COMMUNITIES CHICAGO

- Aquatics Director: Pool Maintenance, program management, swimming instruction, life guard instructor, and swim team coach.
- Youth Day camp team lead and instructor

PROFESSIONAL EXPERIENCE

Territory Brand Manager Boy Scouts of America Non-Profit

- Fundraising campaign management and leadership development to achieve 15% growth over goal of 98,000-113,000K
- Increased Youth Membership Goal 500% in 2016 recruitment through developed partnerships with Schools, Districts, and all local Villages and Cities in the south Chicago metropolitan territory.
- Camping Management Operations Director of Owasippe Scout Reservation 4350 Acre four Camp facilities, financial, operations, safety, food services, and Maintenance in addition to General Camp Operations and staff of over 125 staff

Owner Operations partner CPR Cell Phone Repair

- Partner in Cell Phone Repair company new Location Huntley Illinois.
Operations set up of new location with Corporate platform and Point of sales system.
Inventory control.
- Hiring, training, and management of daily operations.
Fix and repair cell phones, tablets, Computers, and sales of retail cell phone accessories.

District Manager McDonalds Corporation

- Hire train and develop operations for three facilities to certify through Mcdonald's Corporations to maintain the highest grade of an A quality operation to grow the franchise from 6 locations.
- Maintain Profitability and customer loyalty by developing customer programs in each location to help maintain sales during non-peak hours
- Managed the operations of a location takeover from a failing franchise with a Mcdonalds' Grade of F to a B-grade franchise in 6 months of operation.

Store Development Operations Manager Potbelly Sandwich Works

- Operations of 11 New Store Locations started when there were 7 locations and grew to 52 locations within three years.
- Hired staff and trained Management for the first 3-6 months of store operations from setting up the facility to opening day operations of quality of product and generated enthusiasm for staff and customers' excitement to imprint the company standards

District Manager/Director of Development/Operations Manager Top of the Town Inc.,115 Bourbon Street, Hurricanes Inc.

- Managed Operations of food and liquor, profit and loss, marketing and development, and operations of a 44k sq. to 11k sq. club operation with 150 employees.
- Developed concept, implementation, managed all operations from a country bar at 1100.00-dollar day operation to a 22,000-dollar day Night club, from layout design of bar, services, sound system, lighting, and 5 years of growth to become the largest and best night club

PERSONAL ACHIEVEMENTS

Eagle Scout - Boy Scouts of America 1988 / Mayoral Candidate Macomb Election 1999
Scout Master, Assistant Scout Master, District Trainer, Council Training Staff, Gold Medalist All around
Gymnastics City of Chicago

1. **Requested Motion:**

Meeting Date: November 21, 2022

Approve the Selection Advisory Committee's recommendation in response to RFP-23-01-AD, Disaster Recovery Consultant Services, and authorize the Town Manager to negotiate and execute an agreement with Hagerty Consulting, Inc.

Why the action is necessary:

What the action accomplishes:

2. **Agenda:**

ADMINISTRATIVE AGENDA

3. **Requirement/Purpose:**

4. **Submitter of Information:**

5. **Background:**

RFP-23-01-AD was issued to solicit proposals for a Disaster Recovery consultant in response to Hurricane Ian. The Town received 14 proposals. The Selection Advisory Committee reviewed the proposals on Friday, November 11, 2022 and unanimously voted to recommend to the Town Manager the ranking of Hagerty Consulting Services, Inc. as the highest ranked firm and Atkins North America, Inc. as the second ranked firm and Tidal Basin Government Consulting, LLC. as the third ranked firm.

Attachments:

1. HagertyConsultingInc- RFP-23-01-AD
2. Atkins- RFP-23-01-AD
3. Tidal Basin-RFP-23-01-AD

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Yadzia Roa, Deputy Town Clerk/Contracts Manager
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk

Created/Initiated - 11/17/2022
Approved - 11/18/2022
Final Approval - 11/18/2022

1. Title Page

Disaster Recovery Consultant Services

Proposal for the Town of Fort Myers Beach, Florida by
Hagerty Consulting, Inc.

Request for Proposals #23-01-AD

Due November 3, 2022 at 02:00PM EDT

PREPARED BY:

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

CONTACT:

Katie Freeman
Director of Operations
katie.freeman@hagertyconsulting.com
847-492-8454 x119



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3. Letter of Transmittal



November 1, 2022

Amy Baker
Town of Fort Myers Beach
2525 Estero Blvd.
Fort Myers Beach, Florida 33931

Subject: Proposal by Hagerty Consulting, Inc. for Disaster Recovery Consulting Services in Response to Request for Proposals #23-01-AD

Dear Amy Baker and Members of the Town of Fort Myers Beach Evaluation Committee,

Hagerty Consulting, Inc. (Hagerty) is pleased to present our qualifications to support the Town of Fort Meyers Beach (the Town) in providing Disaster Recovery Consulting Services in response to Request for Proposals (RFP) #23-01-AD.

Hagerty is intimately familiar with the current state and needs of the Town that are a result of the catastrophic damages of Hurricane Ian. We understand that all Town infrastructure, to include the Town Hall, water utilities, and parks have been catastrophically damaged. Further, we also know that because of the level of damage to the community and housing, that the Town is at great risk of a greatly impacted tax base as homes are likely to be determined to have “substantial damage” and, when considering both the floodplain requirements and building code requirements will be applied to any reconstruction, the cost to Town residents associated with rebuilding may be prohibitive. As the Town begins the long journey of recovery, selecting the right partner is paramount. While there are many choices in this process, Hagerty provides the Town with the most comprehensive experience and recovery knowledge which is most applicable to the specific needs of Fort Myers Beach. Many firms will discuss their experience with the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, and while relevant, this disaster will require more than just experience with PA, documenting damage and formulating project worksheets (PWs) to obtain disaster grants. This disaster requires wholistic thinking and capability across the recovery spectrum – a capability that Hagerty has proven to provide to clients following events similar to size and scale to Hurricane Ian.

- 1) **Post-Disaster Experience with Beach Communities:** Hagerty has extensive knowledge of municipal recovery in Florida after catastrophic events. Hagerty served as the prime contractor for the Panama City and Panama City Beach following Hurricane Michael – with grants valued at more than \$380 million for the City of Panama City alone across a variety of recovery programs.
- 2) **Building Back Better and Stronger in Florida:** With the impacts of Hurricane Ian, the Town will be provided the opportunity by FEMA to mitigate against future disasters. The Hagerty team has both run FEMA’s hazard mitigation programs for states awarding millions to fund

mitigation projects **and** helped communities design successful applications to receive Hazard Mitigation Grant Program (HMGP) dollars. Both skill sets will be key to position the Town for mitigating the infrastructure that is rebuilt in this recovery.

- 3) **Addressing Housing Needs:** As survivors transition from short term shelters to temporary housing and ultimately to permanent housing, an understanding of both what is eligible under federal disaster programs both in the short-term and long-term will be key. While there are experienced firms that understand short-term options and firms that understand long-term housing program management, no firm combines that experience like Hagerty with leaders such as Brock Long, Mike Sprayberry, and Stan Gimont who have managed these issues through some of the nation's largest disasters.
- 4) **Creative Recovery Solutions:** In catastrophic events such as Hurricane Ian, the Town will need to think creatively about how to rebuild damaged infrastructure. Alternative projects and FEMA's Section 428 Program are tools that the Town should consider as you rebuild. Hagerty has extensive experience finding creative ways to rebuild, even assisting FEMA in drafting the Section 428 Program policy to make it effective for sub-applicants such as the Town.
- 5) **Recovery Relationships:** The town will need to work with stakeholders throughout this recovery process to include FEMA, the United States (US) Department of Housing and Urban Development (HUD), the Florida Division of Emergency Management (FDEM), the Florida Department of Economic Opportunity (DEO), and other government agencies that will assist in the recovery. Hagerty has been working closely within FEMA Region IV, Florida's Region, since Hurricane Michael and maintains proven relationships that the Town can leverage to expedite their recovery.
- 6) **Cash Flow:** As expenses are mounting due to the response and recovery, the Town will need a partner that understands how to obtain reimbursements quickly. This enables vendor payment and allows the recovery to progress. **Working with Lee County, Hagerty has helped secure the first Hurricane Ian Expedited PW for emergency protective measures valued at more than \$12.6 million.** This funding is supporting the County's cash flow as they work through the initial stages of recovery.

Our direct work with these clients impacted by Hurricane Ian means that Hagerty is perfectly poised to support the Town, where our existing relationships can be brought to bear to contribute to positive outcomes through precedent setting and collaborative policy development. Hagerty will bring this demonstrated experience to this engagement.

We offer the Town a dedicated team that is integrated with our pre-existing support to Lee County and other clients impacted by Hurricane Ian. This team includes **Kalindi Fitch** as a dedicated Project Manager supplemented by advisors like **Tanya Shannon, Julie Dennis,** and **Stan Gimont** who are already working on key issues related to Hurricane Ian recovery, ranging from cost recovery to housing and infrastructure repair. As residents of the State of Florida, our teams are very committed to the overall recovery and resilience of the State. As a partner to the

Town, Hagerty's objective is to offer best in class service that not only addresses the impact of Hurricane Ian but also opportunities to build capability and capacity, increasing the Town's resilience across the built environment and within personnel to withstand the impact of the next disaster and recover stronger.

In submitting this proposal, Hagerty affirms we stand ready to perform the services as requested by the Town within the timeframes specified. Hagerty's main points of contact for the proposal, contract, and project are as follows:

Primary Points of Contact: Hagerty Consulting, Inc.

Contact Purpose	Point of Contact
<i>Proposal Inquiries and Contract Negotiation</i>	Katie Freeman, Director of Operations 1618 Orrington Avenue, Suite 201 Evanston, IL 60201 katie.freeman@hagertyconsulting.com 847-492-8454 x119 (Office) 510-851-2664 (Mobile)
<i>Contract Negotiation and Authorized Signatory</i>	Bradley R. Grining, Chief Operating Officer 1618 Orrington Avenue, Suite 201 Evanston, IL 60201 brad.grining@hagertyconsulting.com 847-492-8454 x113
<i>Project Management</i>	Tanya Shannon, Deputy Director of Recovery and Project Executive tanya.shannon@hagertyconsulting.com 850-363-7741 Kalindi Fitch, Project Manager kalindi.fitch@hagertyconsulting.com 407-227-3683

Hagerty greatly appreciates the consideration of the Town and we look forward to serving as your partner in recovery. Should you have any questions or require any additional information, please do not hesitate to contact me.



Katie Freeman

Director of Operations, Hagerty Consulting, Inc.
1618 Orrington Avenue, Suite 201 Evanston, IL 60201
katie.freeman@hagertyconsulting.com
847-492-8454 x119 (Office) 510-851-2664 (Mobile)

4. Background, Experience, and Qualifications of the Proposer

Hagerty is pleased to present our experience and qualifications to the Town. As a firm focused on disaster recovery, and one that is actively engaged in the response to and recovery from Hurricane Ian, with demonstrated success working with municipalities in Florida following similar disaster events. Hagerty is the best positioned firm to support the Town as you embark on your recovery program. We understand the full cycle of emergency management and have provided support services to jurisdictions across the nation to address emerging issues in mitigation, response, and recovery. This includes successful past performance for disaster recovery in the State of Florida.

The following provides an overview of Hagerty's experience and qualifications, including firm organizational information (**Organizational Information, Location, Description of the Range of Activities Performed**), personnel information (**Organization Chart, Staff Capability and Capacity, Staff Personnel Biographies**), **Relevant Past Performance**, and **Subcontractor Information**.

4.a Organizational Information

Hagerty has been providing disaster recovery support services since our inception in 2001. Shortly after our founding, our professionals were asked to support New York City (NYC) to recover from the terrorist attacks of September 11th, 2001. As Hagerty grew, so did our service offerings and capabilities. We are now called upon by government agencies, businesses, and non-profit organizations to increase organizational preparedness, mitigate the impact of disasters, respond to disasters, and streamline recovery processes before, during, and after a disaster occurs. Hagerty and our professionals have managed more than 750 projects across the US, including dozens of projects across the State of Florida focused on resilience and recovery programs.

Hagerty's Local Presence

Hagerty's clients in Florida are supported from our office in Tallahassee and the professionals we have working across the State. Our Tallahassee office is located at:

113 S Monroe St, 1st Floor
Tallahassee, FL 32301

Hagerty provides support to clients across the State of Florida and to clients across the US. We are national in our footprint, with a focus on providing recovery support within the State of Florida through our office in Tallahassee and significant presence in areas like the Panhandle and within Lee County. Hagerty currently has 500 full-time professionals working across the US supported by a cadre of more than 1,000 consultants who support our clients and their needs. These professionals work on Hagerty's portfolio of more than 250 projects, ranging from response support to FDEM associated with Hurricane Ian to long-term recovery support NYC as a result of Hurricane Sandy – a \$15 billion recovery operation. Hagerty possesses the necessary experience and maintains the right relationships to enable a successful recovery for the Town.

4.b Location

Hagerty's work with the Town will be led from our local presence in Lee County, with oversight from our office in Tallahassee, Florida and additional support offered the by more than 70 professionals Hagerty offers based in the State of Florida. Hagerty anticipates significant support will be provided from professionals who travel to and work alongside the Town as you advance your recovery.

4.c Description of the Range of Activities Performed

Hagerty's Tallahassee office supports the full range of services offered by Hagerty to our clients. This includes pre-disaster planning and preparedness services; disaster response services; the full suite of disaster recovery services, to include cost recovery and housing support; and both pre-and post-disaster mitigation services.

4.d Organization Chart

Hagerty's proposed team and organization is informed by our understanding of the needs of the Town and our past experience in disaster recovery programs. Hagerty has built our team to (1) provide dedicated recovery support to the Town; (2) ensure the Town has subject matter expertise and collaborative policy making through our relationships with the County, FDEM, and FEMA; and (3) tailored subject matter expertise based on the specific conditions experienced in the Town. Our team includes expertise in municipal finance who are also experts in disaster recovery programs, allowing our team to rapidly assess and make recommendations to improve the Town's cash flow, including exploring Expedited Projects and federal programs, such as the Community Disaster Loan (CDL) Program to advance the Town's recover and provide cash flow to enable activities to continue as the tax base is rebuilt. This team also includes the nation's leading subject matter experts in disaster housing who are actively collaborating with Lee County, FDEM, and FEMA to address the immediate housing issues resulting from Hurricane Ian.

Our Expertise: CDL Program

Hagerty's professionals are the national experts in the FEMA CDL Program. This Program provides loans of up to \$5 million to communities who have experienced five percent or more in revenue losses as a result of a disaster. Hagerty has developed, reviewed, and supported the cancellation of more than \$2.3 billion in CDLs across the US, including for the City of Panama City.

Our team is comprehensive and is represented in the organizational chart below. It is important to note that as Hagerty works with the Town, the organization and staffing plan will evolve to meet the needs of the Town, surging and scaling based on where the Town is in recovery and what resources and capabilities are required at any given point in time. This is a best practice Hagerty has successfully utilized in managing over \$60 billion in federal disaster grants. Our ability to quickly scale is demonstrated by our current support to Lee County. Hagerty's support began via Tanya Shannon, who deployed on September 26, 2022 and

supported the County from the Emergency Operations Center (EOC) prior to the storm’s destructive forces. Today, almost five weeks later, Hagerty’s team has grown to 36 professionals focused on issues like debris, roads and bridges, housing, and cost recovery.

Hagerty Consulting, Inc.'s Proposed Organization and Preliminary Staffing Plan



4.e Staff Capability and Capacity

Hagerty’s approach to support the Town is based on our proven methods and demonstrated history of supporting clients at all levels of government. **Hagerty knows our services under this contract will have unique considerations, as the needs of the Town will be unique and distinct from the needs of Lee County and in fact different from the needs of every community impacted by Hurricane Ian.** As such, standardization of our project management approach and key tasks will allow flexibility for the Hagerty team to meet the Town’s evolving needs. This same approach was successfully utilized by Hagerty in the recoveries in Panama City and Panama City Beach following Hurricane Michael.

Our Dynamic Approach to Project Management Supports Successful Project Execution and Cost Control



As demonstrated by the biographies below, the Hagerty team possesses the full capability and capacity to perform the full range of services identified by the Town. Upon activation of Hagerty by the Town, we can immediately begin to support the Town with the scope of work outlined within the Request for Proposals (RFP).

Hagerty will be consistent in our communication with the Town, and upon notice to proceed, will deploy personnel to support initial cost recovery operations. In collaboration with the Town in tandem with providing hands-on cost recovery support, Hagerty also recommends executing a two-to-four-week collaborative, strategic planning process to facilitate recovery; aligning processes and functions associated with federal recovery programs to make them more intentional and less reactive. This includes establishing the recovery organization, assigning Hagerty professionals to specific and strategic roles, and queuing work in the most

advantageous order. Strategic planning assures proactive identification of strategies for recovery issues that may arise three, six, or 18 months in the future. The objective of the strategic planning process is to thoughtfully – and with the best information available – create a roadmap for recovery.

4.f Staff Biographies

Hagerty offers the Town a highly qualified team to provide recovery support. This team draws upon Hagerty's national expertise in disaster recovery, significant experience in disaster recovery in the State of Florida, and our strong local presence. As earlier noted, Hagerty will actively and proactively collaborate with the Town to adjust our organizational structure to meet the needs of existing and future disasters.

Hagerty knows the Town will require additional support due to limitation on staff availability and capacity. Our firm tailors our services based on these considerations, collaborating with client leadership to take a significant leadership role in the recovery and serve as the primary point of contact (POC) for FEMA and FDEM. In those cases, we develop strict processes identifying points on when sign off from the client is needed for key decisions and prior to any submission of documentation to FEMA. Other clients seek to do the majority of the documentation collection themselves and use Hagerty subject matter experts as points of reference asking questions when needed.

The following provides the biographies of the proposed Hagerty team; resumes are also provided as an attachment to this proposal for reference by the Town.

TANYA SHANNON, PROJECT EXECUTIVE

Tanya Shannon is an emergency management professional with 12 years of experience, **based out of Panama City, Florida** and currently providing onsite leadership for Hagerty's recovery support to Lee County. Ms. Shannon serves as the project manager for local jurisdictions throughout the State of Florida and other areas overseeing Hagerty operations providing comprehensive recovery from multiple natural disasters and the Novel Coronavirus (COVID-19). Since joining Hagerty in early 2019, the Hagerty teams within Florida alone under Ms. Shannon's leadership have secured and managed **over \$2 billion** from over a dozen different disaster related grant programs.

Prior to joining Hagerty within her role at FEMA PA Headquarters senior leadership, Ms. Shannon was responsible for the mobilization of PA staff for new disasters, and the development and delivery of PA training curriculum (in classroom and online Emergency Management Institute [EMI] independent studies) for FEMA staff as well as states, local, tribal, and territory governments. In 2017, in response to the unprecedented number of catastrophic disasters simultaneously occurring (Hurricanes Harvey, Irma, and Maria; California fires; and northwestern and northeastern states flooding), Ms. Shannon developed a strategy and directed the implementation to mobilize 1,700 FEMA PA staff and FEMA contractors to respond to these disasters; train, and provide continued technical assistance to states experiencing the new PA Model for the first time; and stood up the FEMA Grants Portal hotline. Throughout her time at FEMA, she supported the setup of PA operations on 116 declared disasters nationwide from coordinating training and strategic planning support for FEMA and state/territory field leadership.

KALINDI FITCH, PROJECT MANAGER

Kalindi Fitch is an emergency management recovery expert, with over 12 years of post-disaster grant management experience. Her understanding of FEMA grant recovery position her perfectly to serve as a Project Manager for disaster cost recovery and relief projects. Ms. Fitch has directly supported recent disasters, including: COVID-19 emergency relief in Connecticut, Massachusetts, Georgia, South Carolina, Florida, and Texas; Hurricanes Dorian, Michael, Harvey, Irma, and Maria; wildfires in Ventura County; and the 2017 Thomas and 2018 Woolsey-Hill fires. These deployments, spanning all FEMA regions, directly supported the cost recovery and immediate response to emergencies. Following Hurricanes Irene, Matthew, Harvey and Colorado's Front Range floods, Ms. Fitch provided direct support to applicants leading teams that inspected hundreds of damages, prepared Detailed Damage Inspection Reports (DDIRs), and validated and packaged supporting documentation to support the reimbursement of disaster repairs to federal-aid roads due to the extent and intensity of these disasters. With Ms. Fitch's support and guidance, these applicants were reimbursed over \$750 million in Federal Highway Administration-Emergency Relief (FHWA-ER) funds in addition to their other disaster grants awards. **Ms. Fitch lives in Oviedo, Florida.**

STAN GIMONT, SUBJECT MATTER EXPERT

Stan Gimont is a subject matter expert on the HUD Community Development Block Grant (CDBG) Program after spending over 30 years in various roles at HUD leading this and other grant programs. During his time at HUD, Mr. Gimont served as the Deputy Director of several HUD programs, including the Section 108 Grant Program, the Entitlement Communities Program, CDBG Disaster Recovery (CDBG-DR), and the Neighborhood Stabilization Program. More so, Mr. Gimont edited every CBDG Federal Register Notice from 2008 to 2019 and was instrumental for HUD policy development. As the Deputy Assistant Secretary for Grant Programs, Mr. Gimont also oversaw a staff of 140 staff members, \$4 billion of annual appropriations, and \$90 billion of supplemental appropriations following disasters. Since joining Hagerty, Mr. Gimont has provided subject matter expertise and project oversight for clients seeking assistance in managing and administering *American Rescue Plan Act (ARPA)*, Emergency Rental Assistance Program (ERAP), CBDG-DR, and CBDG - Mitigation (CDBG-MIT) funds.

JULIE DENNIS, SUBJECT MATTER EXPERT

Julie Dennis is a disaster recovery and economic development professional with two decades of experience and expertise in the CBDG-DR program. Ms. Dennis created and implemented a plan to distribute over \$1 billion in CBDG-DR funds throughout the State of Florida when she was the Director of the Division of the Community Development for Florida's DEO. Ms. Dennis has extensive knowledge and experience in planning for and responding to disasters within the State of Florida from her 10 years at the DEO where she managed a statewide initiative to encourage communities to plan for long-term disaster recovery; the model was later adapted to create the National Disaster Recovery Framework (NDRF) that encourages non-traditional emergency management agencies to collaborate during long-term recovery. Recently, Ms. Dennis has provided subject matter expertise through her consulting firm, OVID Solutions, where she has supported multiple counties in Florida develop comprehensive long-term recovery plans in response to Hurricanes

Irma and Michael. She is currently offering her subject matter expertise to Lee County to support long-term recovery from Hurricane Ian. **Ms. Dennis lives in Crawfordville, Florida.**

AMELIA MUCCIO, SUBJECT MATTER EXPERT

Amelia Muccio is an emergency management and public health program manager with 18 years of experience strategizing and leading national and international mitigation, preparedness, response, and recovery projects. Ms. Muccio has worked on all-hazards planning and policy development, grants management and evaluation, capacity building, *Robert T. Stafford Disaster Relief and Emergency Assistance Act* (Stafford Act) Sections 404/406 mitigation, continuity of operations, training, and exercises. Ms. Muccio has experience as a project leader and subject matter expert in support of cost recovery work related to a series of grants and funding sources. She directly supported the resiliency and consequence assessment efforts of 16 city agencies for NYC during immediate Hurricane Sandy recovery needs. Between August 2013 and May 2015, Ms. Muccio spearheaded the submission of an \$860 million HMGP Section 404 portfolio on behalf of the city as part of larger risk management and preparedness efforts. For Section 406, Ms. Muccio oversees the mitigation recovery effort for city agencies with a continuously expanding portfolio valued at \$2.2 billion.

LEE MAYFIELD, SUBJECT MATTER EXPERT

Lee Mayfield is a proven emergency response professional with over 13 years of experience at both the state and local level, most recently serving as the director of public safety and emergency management for Lee County in Southwest Florida. While with Lee County, Mr. Mayfield oversaw the county's response to and recovery from Hurricane Irma in 2017. This event included the largest evacuation in the area's history, as well as the largest single-county sheltering operation within the State of Florida. Following Hurricane Irma, he coordinated a multi-jurisdictional effort, applying for and securing approximately \$40 million in HMGP funding. He also led his emergency operations team through the response to and recovery from other hazards, including a significant cyber incident; numerous severe flooding and tropical weather events; and, most recently, the COVID-19 pandemic. Mr. Mayfield is currently providing subject matter expertise associated with response operations for Hurricane Ian in Lee County, Florida. **Mr. Mayfield is currently a resident of Tampa, Florida.**

JOHN GRATHWOL, SUBJECT MATTER EXPERT

John Grathwol is the former Deputy Director of Budget Resources for the NYC Office of Management and Budget (OMB). In this role, he directed and managed the City's \$83 billion annual operating budget and ensured compliance monitoring for roughly \$4.2 billion in CDBG-DR funding following Hurricane Sandy. He successfully directed FEMA grant claims for NYC and ensured that negotiations with the US Department of Housing and Urban Development (HUD) HUD for expanding grant opportunities went smoothly. Mr. Grathwol has also served in management consulting capacities supporting FEMA management at agency headquarters and as a project executive for several Hagerty teams across the country. In addition to his project and financial management experience, Mr. Grathwol is seasoned in policy impact analysis and providing public testimony before government bodies.

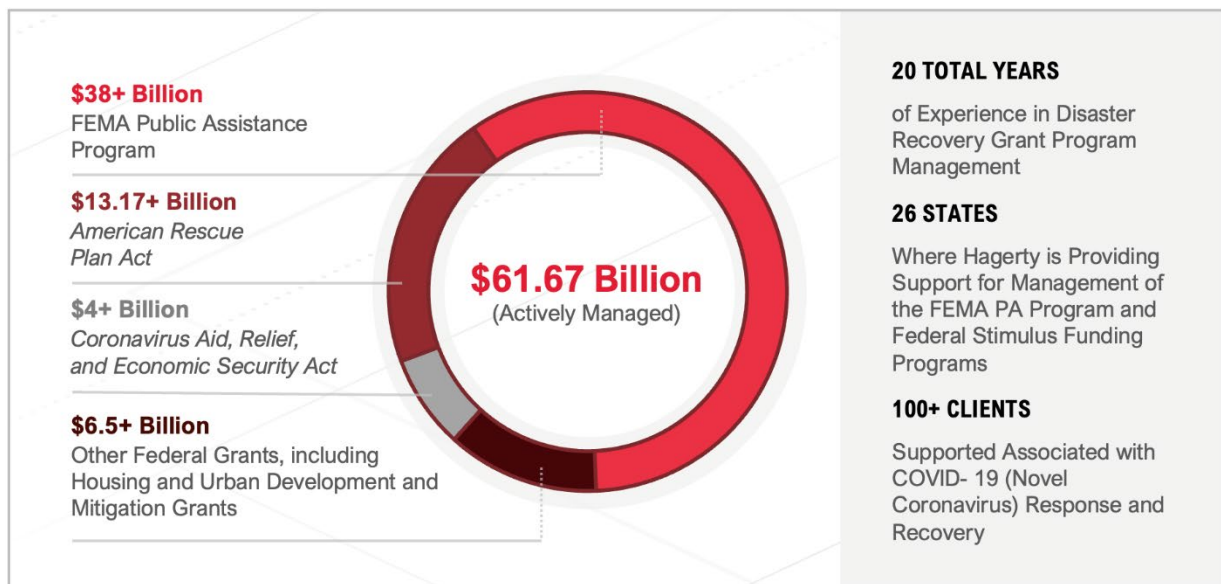
JOHN H. HAGEMAN, MUNICIPAL FINANCIAL ADVISOR

John Hageman has over 10 years of experience in strategic management, public sector finance and administration, and restructuring and turnaround. Mr. Hageman previously served as the Chief of Staff for the City of Detroit's Office of the Chief Financial Officer, helping to lead the city's successful financial recovery and reform post-bankruptcy. Immediately prior to joining Hagerty, he advised the Financial Oversight and Management Board (FOMB) for Puerto Rico, helping to develop strategies to improve the Commonwealth of Puerto Rico's financial management operations. At Hagerty, he oversees the firm's federal funds management offering and ARPA portfolio, advising clients as they manage over \$13 billion in federal funding while navigating new federal programs under the *Infrastructure Investment and Jobs Act* (IIJA). Mr. Hageman conceptualized and led the design of the State of Maryland's Non-Entitlement Units of Government (NEUs) Technical Assistance Program, which supports 145 NEUs in the administration of \$500 million in Coronavirus Local Fiscal Recovery Funds (CLFRF). Mr. Hageman serves in executive or advisory roles on Hagerty's key CLFRF engagements across the nation.

4.g Relevant Past Performance

Hagerty specializes in providing solutions for our clients' most complex problems by analyzing existing policy, identifying options, and assisting to execute solutions. Structurally, Hagerty combines the capabilities of our internal Divisions – Preparedness, Response, Recovery, and Mitigation – to support our clients, including traditional emergency management staff augmentation in the EOC, strategic advisory support through response/recovery task forces, mitigation application development and grant management, and overall cost recovery. **We call this the One Hagerty approach, and it is a core philosophy that informs and drives how we support our clients.** Through the Hagerty Project Management Team (PMT) that will collaborate with the Town, our approach ensures the identification of cross-cutting issues, actions, needs, and innovation during recovery operations, thus enhancing the Town's overall recovery program.

Hagerty's Expertise has been Leveraged to Meet Emerging Cost Recovery Needs Specific to Various Disasters



Hagerty's expertise and capability is directly aligned to the specific needs of the Town. Our 20 years of experience and expertise have been applied to meet the unique needs of each and every client, contract, and project supported by our teams. This includes the current support Hagerty is providing to Lee County, Cape Coral, and other clients impacted by Hurricane Ian. Because of this experience, we understand the full extent of the damages to the Town and the road ahead as you embark upon your recovery. This experience is further detailed and described below.

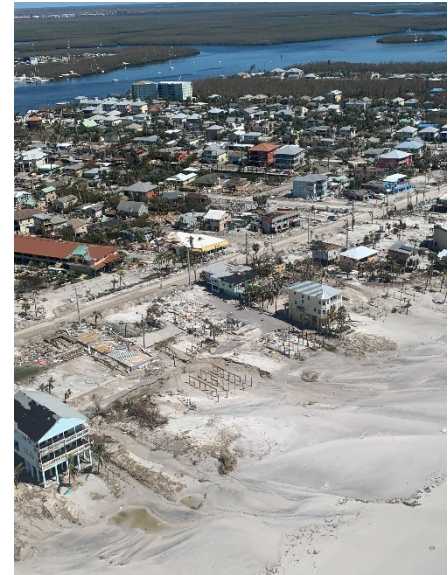
OUR CURRENT UNDERSTANDING OF THE TOWN'S NEEDS IS INFORMED BY OUR COLLABORATION WITH LEE COUNTY, LEADING TO EFFICIENCIES IN OUR IMPLEMENTATION APPROACH.

Hagerty has had personnel deployed to support Hurricane Ian response and recovery since September 26, 2022 when our consultants mobilized to the Lee County EOC. Hagerty worked side by side with County staff as Hurricane Ian made landfall causing catastrophic damages throughout southwest Florida. Hagerty quickly mobilized additional subject matter experts, with more support arriving every single day to support County departments, ensuring that they are implementing response and recovery best practices and documenting the costs in the format preferred by FEMA and FDEM.

To date, the Hagerty team has submitted a Request for Public Assistance (RPA) and has submitted two Expedited Projects. To date, the County has been paid approximately \$20 million associated with projects developed in collaboration with the Hagerty team. This funding is critical; it amounts to FEMA advancing half the costs the County has incurred in the immediate aftermath of the disaster.

Further, on Wednesday, October 5th, Hagerty coordinated FEMA PA Leadership to visit critical sites requiring expedited site inspections prior to demolition. Hagerty is in the process of submitting an additional \$30 million in projects to FEMA. These projects, which should be obligated in the coming weeks, will provide critical financial support to the County as they advance recovery. Through our work with the County, Hagerty is experienced in the changes to the FEMA PA Program as enacted by the *Disaster Recovery Reform Act of 2018* (DRRA) – notably the building code and floodplain administration and management changes as enacted by Section 1206. This Section amends the Stafford Act to provide financial assistance for building code and floodplain administration and enforcement, including inspections for substantial damage compliance. For up to 180 days, this assistance provides an invaluable resource for the Town, given the level of damages to homes and infrastructure and the costs that will be incurred as a result of Hurricane Ian. It helps provide a bridge for the Town, allowing the Town to capture and claim the costs of staff surge and staff augmentation that are eligible under Section 1206.

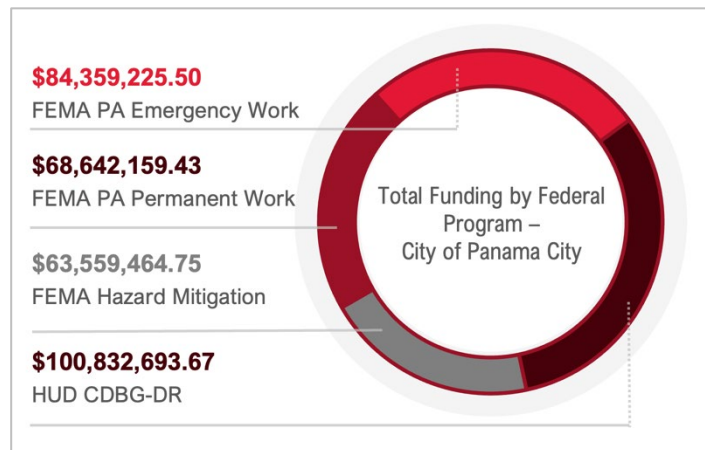
Damages to the Town as Pictured from an Aerial Tour Conducted by the County with Hagerty



Our proposed Project Executive, Tanya Shannon, is in close coordination daily with the FDEM and FEMA, ensuring they have visibility on critical areas and priorities of the County. This close coordination with FEMA and FDEM at the County level benefits all of Hagerty's clients within the Hurricane Ian impacted areas where information shared with the County is immediately disseminated to all Project Managers so they may all operate at the same expedited timeline.

OUR PROFESSIONALS HAVE SUPPORTED LONG-TERM RECOVERY OPERATIONS FOR CLIENTS WITH CATASTROPHIC DAMAGES IN THE STATE OF FLORIDA, DEMONSTRATING OUR CAPABILITY AND CAPACITY TO SUPPORT THE TOWN.

Hagerty has been the long-term partner to the City of Panama City as they recover from Hurricane Michael. Soon after this devastating Category 5 storm made landfall in October 2018, the City of Panama City requested Hagerty to provide comprehensive recovery support to help guide and support them through their worst day. Hurricane Michael was the worst storm to hit the Florida panhandle in recorded history and, at the time, the fourth worst hurricane to hit the



continental US. In six short hours, the Category 5 storm caused devastating damage to over 45,000 structures, including 98 percent of the City of Panama City's infrastructure. The Hagerty team has been their partner for more than four years as they navigate their recovery, with additional gains for the City realized as a result of our collective efforts.

Hagerty mobilized an expert team, including permanently relocating staff that still call Panama City home, to provide a myriad of services including, but not limited to: FEMA PA cost recovery services, long-term recovery planning (including economic and downtown redevelopment planning), CDBG-DR application and grant management support, comprehensive water management planning in alignment with a strategic approach to mitigation grant development and management, and much more.

Hagerty's accomplishments supporting the City are numerous. In addition to providing strategic advisory support throughout the recovery to Mark McQueen, the City Manager, Hagerty's professionals have caught and corrected \$9.8 million in errors and omissions during the review of the FEMA created PA cost estimates; ensured the City was reimbursed for 98 percent of the debris removal costs; and led the City to become the single largest recipient of CDBG-DR home buyout funding, receiving \$5 million to purchase more than a dozen repetitive flood homes.

Thus far, the City has secured with Hagerty's assistance more than **\$380 million** in disaster grant funding to support their recovery from Hurricanes Michael and Sally and the COVID-19 pandemic. This includes a recent award of \$50 million in funding to support the recovery of underground water infrastructure.

HAGERTY OFFERS INNOVATIVE SOLUTIONS THAT WILL ADDRESS THE TOWN'S ISSUES, ALLOWING HAGERTY TO ADD VALUE TO YOUR RECOVERY.

Hagerty and our professionals have been at the forefront of developing and executing innovative recovery policies, methodologies, and tools in the aftermath of large-scale complex disasters. Concepts designed and executed for our clients have **(1)** been recognized as best practices in managing recovery funding; **(2)** directly influenced the implementation of new FEMA programs; and **(3)** served as the foundation for or have become federal policy. We lead the emergency management industry in innovation, which has been proven time and time again during disaster recovery operations. Further, our innovation and expertise span the whole of the recovery programs that will be brought to bear to support the Town.

The following provides an overview of the accomplishments and innovations of the Hagerty team.

Issue Area	Innovations and Accomplishments
Expedited Projects	Hagerty has already supported Lee County to develop an expedited PW for Hurricane Ian. This PW, valued at \$12.6 million , supports the County's immediate needs associated with debris, security and safety in hazardous areas, EOC operations, and other life safety issues.
Project Funding and Cash Flow	Over time, Hagerty supported the City of Panama City to address a multitude of issues that are focused on funding and cash flow. Hagerty assisted the City with securing a loan under the CDL Program valued at \$5 million which has now been forgiven. Further, Hagerty supported the City to receive a waiver of the City's 12.5 percent cost share on all FEMA projects, saving the City an estimated \$12.7 million . Hagerty also supported the City to leverage CDBG-DR match funding to cover the City's 25 percent cost share on all FEMA 404 Hazard Mitigation funded projects. This means FEMA and CDBG-DR are paying 100 percent of the \$63.5 million requested by the City to make critical infrastructure more resilient.
Speed of Project Support	In March 2020, Hagerty mobilized a team to support Miami-Dade County through their cost recovery for expenses incurred responding to COVID-19. Hagerty immediately mobilized an expert team to provide subject matter expertise as guidance was continuously issued and reissued by FEMA and as other funding streams came to be. By September 2021, Hagerty had secured reimbursement for Miami-Dade County for more costs than double the combined amount all other local government and non-profit subrecipients within the State of Florida had received to date (meaning actual reimbursement and payment to the County by the State, not just obligation by FEMA).
Flexible Recovery Programs	Since 2013, our professionals have supported a grant portfolio valued at more than \$15 billion across the FEMA PA Program, Hazard Mitigation Assistance (HMA) Programs, and the CDBG-DR Program. Hagerty and NYC have partnered to maximize federal funding in creative ways, as evidenced by use of FEMA's Section 428 Public Assistance Alternative Procedures (PAAP) Program to fund an improved, more resilient Rockaway Boardwalk, a grant valued at \$480 million . This single project was among more than approximately \$5 billion in flexible PAAP funding secured by NYC.

Issue Area	Innovations and Accomplishments
Incorporation of Mitigation	While working with Montgomery County, Texas, Hagerty has supported multiple home buyout programs funded by the FEMA Flood Mitigation Assistance (FMA) Program and CDBG-DR Program. In January of 2022, through Hagerty's leadership, the County became the first in the State of Texas to purchase a buyout property under the CDBG-DR 2017 (Harvey) Program – more than four years after disaster.
Housing Programs	In response to Hurricane Michael, Bay County was allocated \$36 million in Hurricane Housing Recovery Program (HHRP) funding to restore and rebuild housing within the community. Hagerty was tasked with developing efficient and effective housing strategies with an emphasis on creating homeownership opportunities and affordable housing. Through our support to the County, HHRP funding assisting 285 low- to moderate-income (LMI) families with their rental and permanent housing needs. Of the 285, 204 are first-time homebuyers that were approved for down payment and closing cost assistance.

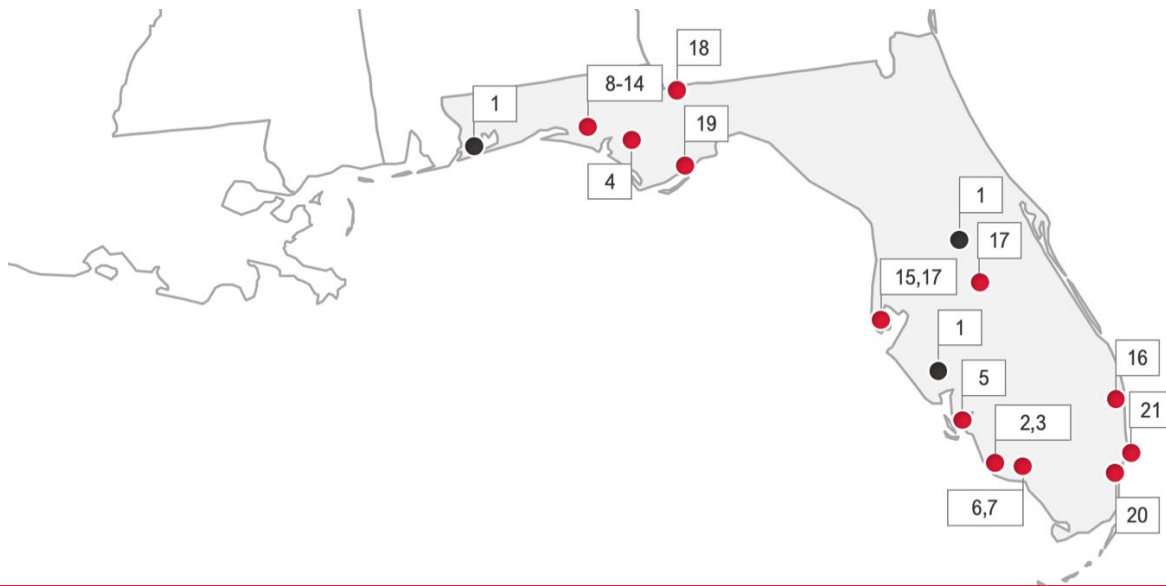
Hagerty's expertise and innovation are underscored through our understanding of recovery programs in the State of Florida. Prior to Hurricane Ian, Hagerty was engaged by Lee County to support the development of a Cost Recovery Plan. Members of the Hagerty team proposed to work with the Town, including Tanya Shannon, worked with Lee County to identify how to best document costs as they are incurred through the response and recovery.

As Hagerty team has supported the County to enact this plan, including deploying County and contractor staff prior to hurricane landfall to assist in the documentation collection and review process through the initial response and recovery. Early in the planning process FDEM announced their new Florida Recovery Obligation Calculation (F-ROC) initiative; FDEM stated they will be evaluating and assigning a F-ROC score all potential subrecipients (e.g., local governments and non-profits) and those subrecipients that have a Cost Recovery Plan will receive a higher F-ROC score. The F-ROC score will determine the percentage of dollars that will be released prior to FDEM's 100 percent audit, meaning a higher F-ROC score means more money reimbursed faster for the County. **In early Summer 2022, FDEM stated that Lee County's Cost Recovery Plan is the model for what they are looking for with the F-ROC process.** Hagerty is seeking to bring that same expertise to the Town.

Hagerty Offers Extensive Experience in the State of Florida, Including Focused on Recovery Program Management.

Hagerty's professionals have been directly engaged in preparedness, response, recovery, and mitigation across the State of Florida. The following graphic illustrates our ongoing commitment to clients in Florida and the breadth of disaster preparedness and recovery work performed over the past 20 years.

Hagerty's Past and Ongoing Support to Florida Clients



1. 2004 Florida Hurricane Season Joint Field Office
2. Collier County Recovery Support (Hurricane Irma)
3. Collier County After-Action Review (Hurricane Irma)
4. Calhoun Liberty Hospital Disaster Recovery (Hurricane Michael and COVID-19)
5. Sarasota Memorial Hospital Disaster Recovery (Hurricane Irma)
6. Lee County/Southwest Florida Regional Evacuation Plan
7. Lee County Hazard Mitigation Plan Update, Pre-Disaster Recovery Plan, COVID-19 Cost Recovery, and Cost Recovery Plan
8. City of Panama City (Hurricane Michael)
9. Panama City Beach (Hurricane Michael)
10. Bay District Schools (Hurricane Michael)
11. Palm Bay Education Group (Hurricane Michael)
12. Panama City Housing Authority (Hurricane Michael)
13. Bay Haven Charter Academy (Hurricane Michael)
14. Girls, Inc. of Bay County Disaster Recovery Administrative Services (Hurricane Michael)
15. CARES Inc. Cost Recovery (Hurricane Michael)
16. Town of Davie Emergency Management Consulting (Recovery Training)
17. Pinellas County Disaster Recovery Management (COVID-19 Fiscal Recovery Funds)
18. Leon County Recovery Support (Hurricane Michael and COVID-19 Cost Recovery)
19. FDEM COVID-19 Response and Recovery Support; FDEM Michael 428 Policy Support
20. Miami-Dade County Disaster Cost Recovery Services (COVID-19, Irma, and Champlain Building Collapse Cost Recovery Support and After-Action Report)
21. Town of Surfside (Champlain Building Collapse Cost Recovery)

Specific Past Performance and References

The Hagerty team knows there is no better evidence of our capability to support the Town than our current and previous support for disaster recovery programs in Florida – including those clients we are currently serving as they recover from the damages associated with Hurricane Ian. The following provides Hagerty's specific past performance and references. In compliance with the Town's RFP, references are also provided under **8. Reference and Contact Information for Similar Completed Projects**.

LEE COUNTY DISASTER MANAGEMENT SERVICES & HURRICANE IAN SUPPORT

Name of Entity	Lee County Office of Emergency Management
Contact Person Name and Title	Sandra Tapfumaneyi, Operations Section Chief
Contact Person Phone	239-826-5930
Contact Person Email	STapfumaneyi@leegov.com
Mailing Address	2675 Ortiz Avenue, Fort Meyers, FL 33905
Type of Services Provided	Planning and recovery support services.
Date of Services Provided	December 2019 to Present

In December 2019, Hagerty was awarded a contract to provide recovery support to Lee County on a standby basis. Recovery services include consulting, representation, assistance, and support monitoring Lee County's recovery efforts and compliance and reporting responsibilities to federal and state governments.

In June 2021, Lee County requested Hagerty support to develop a pre-disaster Long-Term Recovery Plan and Cost Recovery Plan to ensure the County effectively recovers from a Hurricane Michael-like event. Our support included the update and expansion of the County's Long-Term Community Disaster Recovery Plan and Cost Recovery Plan through a participatory process involving County departments, key external partners, and the development and provision of training to validate and socialized both plans. The Cost Recovery Plan developed by the County and Hagerty is now being touted by FDEM as the model for F-ROC compliance. In March 2022, the County requested additional Hagerty support to manage the FEMA PA COVID-19 cost recovery process.

For Hurricane Ian, Lee County mobilized Hagerty consultants on Monday, September 26, 2022, to the County EOC. Hagerty worked side by side with County staff as Hurricane Ian made landfall causing catastrophic damages throughout southwest Florida. Hagerty quickly mobilized additional subject matter experts, with more support arriving every day to support County departments, ensuring that they are implementing response and recovery best practices and documenting the costs in the format FEMA and FDEM prefers from the start. The Hagerty team has submitted an RPA and has worked with the County to secure approximately \$20 million in funding from FEMA, with another \$30 million in development. One of those projects obligated is the first Expedited PW for the disaster, valued at \$12.6 million, to support emergency protective measures, including the costs of the EOC and other security measures in highly damaged areas.

Our Project Executive, Tanya Shannon, is in close daily coordination with the FDEM and FEMA, ensuring they have visibility on critical areas and priorities of the County. On Wednesday, October 5th, Hagerty coordinated FEMA PA Leadership to visit critical sites requiring expedited site inspections prior to demolition. This close coordination with FEMA and FDEM at the Lee County level benefits all of Hagerty's clients within the Hurricane Ian impacted areas where information shared with the County is immediately disseminated to all Project Managers so they may all operate at the same expedited timeline.

CITY OF PANAMA CITY DISASTER RECOVERY CONSULTING SUPPORT

Name of Entity	City of Panama City, FL
Contact Person Name and Title	Mark McQueen, City Manager
Contact Person Phone	850-872-3010
Contact Person Email	mmcqueen@pcgov.org
Mailing Address	501 Harrison Avenue, Panama City, FL 32401
Type of Services Provided	Comprehensive recovery support including FEMA PA, housing, and utility mitigation planning, securing grant funding, and supporting implementation and compliance.
Date of Services Provided	December 2018 to Present

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

In December 2018, the City selected Hagerty for disaster recovery services. These services include the development, management, and reimbursement of federal and state grants including FEMA PA, Hazard Mitigation 404 and 406, CDBG-DR, FMA, Building Resilient Infrastructure and Communities (BRIC), Resilient Florida, and State Revolving Fund (SRF). In 2019, the City expanded their contract, asking Hagerty to provide experts in long-term recovery planning, economic development planning, unmet needs assessments (UNAs), and housing recovery. **Today, with the help of Hagerty, the City has successfully secured over \$380 million in disaster grant funding to rebuild a stronger and more resilient City of Panama City.**

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

- » Identifying and correcting \$9.8 million in errors and omissions during the review of the FEMA created PA cost estimates;
- » Supporting the City to ensure the State of Florida covers the City's 12.5-percent cost share on all FEMA PA projects, saving the City nearly \$20 million;
- » Ensuring the reimbursement by FEMA of 98 percent of the City's debris removal cost;
- » Structuring recovery programs such that FEMA and CDBG-DR are paying 100 percent of the \$63.5 million requested by the City to make critical infrastructure more resilient;
- » Supporting the City to achieve a maximum award under the FEMA CDL Program, which was forgiven in 2021 due to compliance with all loan requirements;

- » Securing approximately \$60 million in CDBG-DR funding to replace underground infrastructure and improve exterior business facades throughout five of the City’s historic business districts; and
- » Supporting the City to become the single largest recipient of CDBG-DR home buyout funding, receiving \$5 million to purchase more than a dozen repetitive flood homes.

CITY OF CAPE CORAL PREPAREDNESS AND HURRICANE IAN SUPPORT

Name of Entity	City of Cape Coral, Florida
Contact Person Name and Title	Alvin Henderson
Contact Person Phone	239-242-3611
Contact Person Email	ahenderson@capecoral.gov
Mailing Address	1115 SE 9 th Ave, Cape Coral, FL 33990
Type of Services Provided	Recovery support services, emergency planning
Date of Services Provided	June 2021 to Present

Hagerty was selected by Cape Coral in 2021 to support needs associated with disaster administration. For Hurricane Ian, the City of Cape Coral mobilized Hagerty consultants on Monday, September 26, 2022 to the City’s EOC. Hagerty worked side by side with City staff as Hurricane Ian made landfall causing catastrophic damages throughout Cape Coral.

Hagerty quickly mobilized additional cost recovery subject matter experts and an Incident Management Team (IMT) to provide additional recovery and response support to the City’s EOC and internal departments. Cost recovery consultants have been ensuring that the City’s implements cost recovery best practices and documents costs in the FEMA and FDEM PA preferred format. The Hagerty team has also submitted an RPA for the City and is currently working with FEMA to submit three Expedited Projects which will result in FEMA advancing half the costs the City has and anticipates incurring within the first 30 days of the disaster. Project Executive, Tanya Shannon, is also in close coordination with the FDEM and FEMA ensuring they have visibility on the priorities of the City.

4.h Subcontractor Information

Hagerty is proud to team with OVID Solutions to support the Town. OVID Solutions is a woman-owned and operated consulting firm that specializes in helping communities plan for the future and secure dollars to implement large-scale visions. They offer a statewide presence in Florida with under 10 dedicated employees. They are based out of Tallahassee, Florida. OVID Solutions primary services and range of activities include Strategic Project-Based Planning; Disaster Recovery; Grant Resource Making; Grant Development; and Grant Management.

Prior to founding OVID Solutions, Julie Dennis served as the top Community Development Official for the State of Florida, managing most of the state funds available to rural communities to grow their economy,

over \$100 million in federal non-entitlement grant funds and billions of dollars appropriated following disasters. She has authored and directed the development of many federal spending plans and managed statewide compliance efforts. With a diverse background in federal grant programs, we know how to help states and communities responsibly and transparently manage these funds.

OVID Solution's service offerings include, but are not limited to:

- » Grant writing and grant management for state, federal, non-profit, and private foundation sources.
- » Federal program and policy development to ensure compliance.
- » Long-term recovery planning and advisory services to help access millions to address unmet needs.
- » Resiliency planning and implementation, including coastal adaptation to sea level rise.
- » Project development and matching community priorities with funding sources.
- » Affordable housing advisory services including how to creatively access and expend Florida Housing Finance Corporation Funding to address workforce housing challenges.
- » Economic development planning and consulting to help communities attract and create jobs.

The following provides references for OVID Solutions. Personnel and alignment to the overall organizational chart are discussed earlier in this section under **4.d Organization Chart** and **4.f Staff Biographies**. Resumes are provided as an attachment to this proposal.

LIBERTY COUNTY LONG-TERM RECOVERY PLAN, CALHOUN COUNTY LONG-TERM RECOVERY PLAN, PANACEA COMMUNITY AND ECONOMIC DEVELOPMENT REVITALIZATION PLAN

Name of Entity	Apalachee Regional Planning Council
Contact Person Name and Title	Chris Rietow, Executive Director, Apalachee Regional Planning Council
Contact Person Phone	850-322-4761
Contact Person Email	CRietow@arpc.org
Mailing Address	2507 Callaway Rd #200 Tallahassee, FL 32303
Type of Services Provided	Long-Term Recovery and Economic Development Planning Support
Date of Services Provided	June 2019 to June 2020

OVID Solutions partnered with the Apalachee Regional Planning Council to draft long-term recovery plans in the wake of Hurricane Michael for two impacted rural counties in Florida. Very little long-term planning had been done; therefore, these plans served as the guide for redevelopment and planning for the future of these communities even four years after the storm. In addition, OVID Solutions partnered with the Apalachee Regional Planning Council to guide the Community of Panacea in Wakulla County through the Florida DEO Competitive Florida Economic Development program to create a Community and Economic Development Revitalization Plan. This plan is in the process of being implemented and with the support of OVID Solutions. A grant was recently awarded to complete a project to install murals and an Oyster Trail throughout the coastal areas of the small town.

MANAGEMENT OF ECONOMIC DEVELOPMENT ACTIVITIES IN WAKULLA COUNTY, FLORIDA

Name of Entity	Wakulla Economic Development Council
Contact Person Name and Title	Jessica Revell, Treasurer, Wakulla Economic Development Council
Contact Person Phone	850-528-3545
Contact Person Email	jessica@shepardaccounting.com
Mailing Address	Not Applicable
Type of Services Provided	Economic Development Consulting
Date of Services Provided	July 2019 to Current

OVID Solutions leads management of the Wakulla Economic Development Council, including business recruitment, retention, and expansion along with marketing, strategic planning, and placemaking throughout Wakulla County. The Wakulla County Economic Development Council started as a volunteer-led public-private partnership that hired its first economic development professionals in 2019. Since this time, OVID Solutions, along with its partner firm has worked to establish this organization in the region as a leading Economic Development Organization that has been awarded over \$300,000 in grant funding to support efforts. Accomplishments include development of marketing videos, international marketing and advertisement of the community, development of a strategic plan for the County, and rebranding through a new website that recently received an award from the Florida Economic Development Council.

GRANT MANAGEMENT FOR CALHOUN-LIBERTY HOSPITAL

Name of Entity	Calhoun-Liberty Hospital
Contact Person Name and Title	Chris Jepsen, CEO, Calhoun-Liberty Hospital
Contact Person Phone	402-686-4095
Contact Person Email	ChristiniaJepsen@calhounlibertyhospital.com
Mailing Address	20370 Burns Ave Blountstown, FL 32424
Type of Services Provided	Grant Management Consulting Support
Date of Services Provided	2019 to Present

OVID Solutions assists the hospital with grant writing and grant management for an approximately \$40,000,000 economic development project to construct a brand-new hospital that will serve four counties throughout the region. With the support of our team, the hospital has been awarded the only direct allocation of \$18.7 million in CDBG-DR funding that will assist with the development of the new facility. This funding, combined with FEMA PA funds will result in the largest economic development project in these two counties. OVID Solutions is actively managing this grant funding to ensure compliance and the hospital will break ground by December of 2022.

5. Description of Project Team and Team's Approach/Methodology

Hagerty is already in Lee County, which means that within hours of being issued a notice to proceed, we will have a representative on-site and ready to support the Town as you advance recovery from Hurricane Ian. Hagerty is ready to provide comprehensive services that address all aspects of disaster recovery. Hagerty will seek to meet with Town staff to identify immediate priorities and understand how costs thus far have been documented. The following outlines the steps Hagerty will seek to complete in partnership with the Town, in addition to any other priorities the Town identifies:

FIRST WEEK

- » Meet with the Town to understand response and early recovery efforts and main priorities;
- » Notify the FDEM and the FEMA PA Leadership that Hagerty is supporting Town and outline the main priorities;
- » Review insurance policies, procurement process, costs to date, and identify areas where Hagerty can provide technical assistance to expedite the Town's recovery and reimbursement of costs; and
- » Develop and submit Expedited Category A Debris and Category B Emergency Protective Measures projects for the first operational period.

SECOND WEEK

- » Initiate development of Damage Inventory Spreadsheet identifying all damages in the FEMA format while also identifying any PA awards on previous disasters and anticipated insurance proceeds;
- » Continue to collect, review, and develop reconciled packages of contract and purchase orders, invoices, payroll records, activity logs, maintenance records, and other backup documentation;
- » If desired, connect the Town with Hagerty clients within Bay County, Florida impacted by Hurricane Michael in 2018 to discuss their experience, best practices, and lessons learned;
- » Request FDEM to issue the Subrecipient Agreement so that it may be fully executed prior to Expedited Project obligation so there is no delay in advance payment; and
- » Develop a long-term strategy based on the Town's needs and present to the Town for feedback and approval.

THIRD WEEK AND BEYOND

- » Work with FEMA to schedule the Exploratory Call, Recovery Scoping Meeting, and Site Inspections;
- » Work with the Town to identify sites where additional certified engineering reports and/or 50 percent analysis cost estimates are necessary and work to have those completed;
- » Identify mitigation opportunities and develop proposals and applications for grant funding;
- » Advocate for a longer 100 percent federal cost share time period and 90 percent federal cost share on all emergency work after the 100 percent federal cost share time period; and
- » After project obligations, draw down as costs are incurred through the permanent work process and initiate closeout at the appropriate time.

The following provides additional detail regarding the specific support that the Hagerty team will provide in the weeks, months, and years to come. This includes our approach to supporting the Town across the FEMA PA Program, hazard mitigation programs, and the HUD CDBG-DR Program, once that funding becomes available to the Town. The key steps that will be taken by the Hagerty team as it applies to immediate services required by the Town will vary, given the specific needs of the Town and the progress made in the weeks since Hurricane Ian landfall.

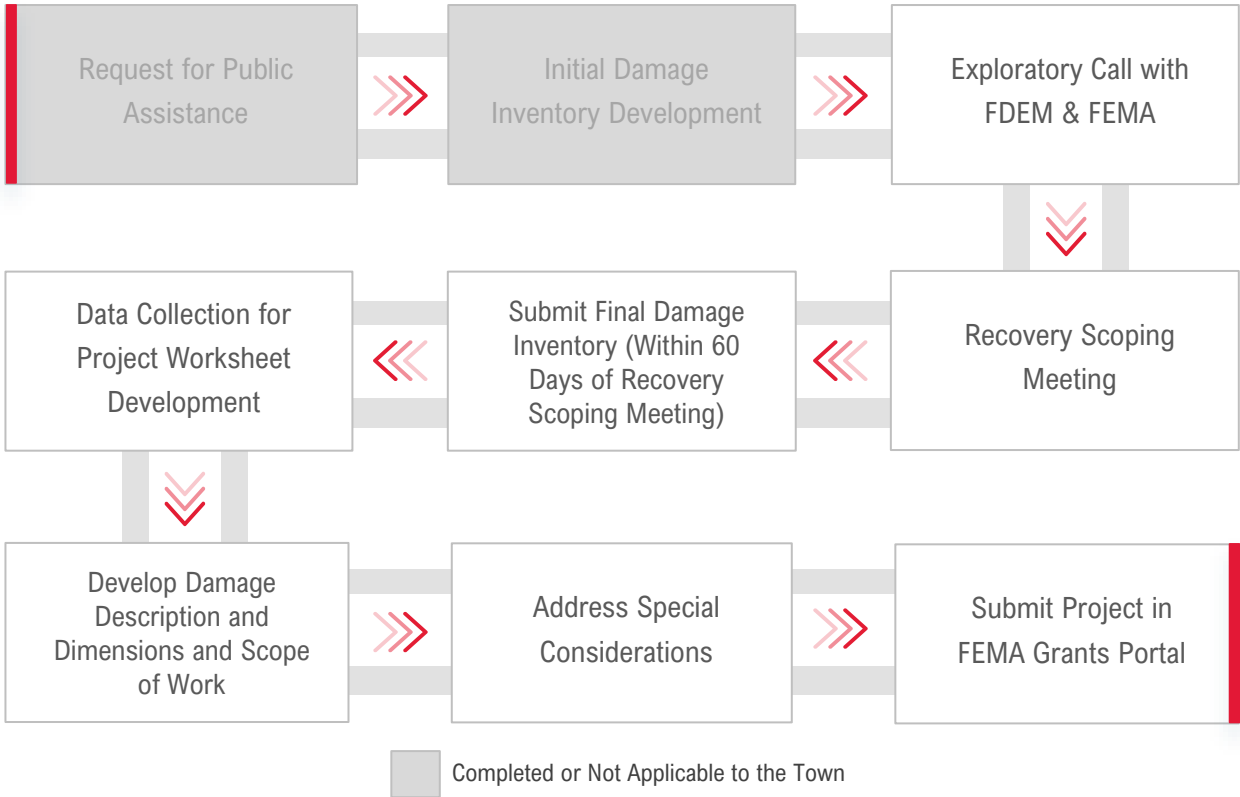
Project Team

Hagerty has provided a description of the project team, including a team structure and resumes, under Section 4. Background, Experience, and Qualifications of the Proposer.

Approach to Services: PA Grant Management

While the FEMA PA process can seem straight forward and checklist driven, when actively engaged in specific aspects of every recovery, understanding the unique considerations and nuances of the FEMA PA Program become critical for the Town, particularly given the level of damages that have been experienced as a result of Hurricane Ian. Scoping, cost estimating, leveraging the Section 428 Program, and addressing audits are all issues that need to be proactively managed and addressed through the project formulation and beyond.

Key Steps in the FEMA PA Project Formulation Process



Hagerty's approach to supporting the FEMA PA Program is founded on experience working directly with recipients and subrecipients across the US to develop grants and administer the program. Hagerty's approach to services, presented below, accounts for those activities that we know have already been completed and/or that are irrelevant for this disaster, such as the initial damage assessment (IDA) and preliminary damage assessment (PDA), which was not required; the development of the Town's Request for Public Assistance (RPA), which has already been submitted; or support for the Applicant Briefings, which have been executed on an ongoing basis via teleconference by FEMA.

THE FEMA PA DELIVERY MODEL AND KEY TIMELINES

Hagerty will support the Town in navigating the continuous changes and improvements to the FEMA processes and Grants Portal system, as our extensive network across the US gives us the advantage of frequently being aware of changes to FEMA's process prior to FEMA field assets being trained or briefed.

Scaling the Hagerty Team's Support

Hagerty's Project Manager and Project Executive will be constantly assessing with the Town the need for additional Hagerty staff on site or remotely, the need for specialized support for a specific task, or if staff are no longer needed. Hagerty will scale to meet the needs of the Town.

Under FEMA's PA Delivery Model, the Program Delivery Manager (PDMG) is the primary interface between the Town and FEMA. The PDMG will be responsible for scheduling the Exploratory Call, usually within seven working days from approval of the RPA, and the Recovery Scoping Meeting, theoretically within 21 working days upon assignment.

It is important to note that the Recovery Scoping Meeting triggers the 60-day regulatory timeline to identify all damages. The County was recently assigned a PDMG. Hagerty and the County are working to delay the Recovery Scoping Meeting to allow the County additional time and flexibility to identify damages prior to the beginning of the 60-day regulatory requirement. Hagerty will coordinate and collaborate with the Town and FEMA to similarly – strategically – schedule the Recovery Scoping Meeting in such a way that benefits the Town's timeline and priorities.

Regardless of the timing associated with the Recovery Scoping Meeting, Hagerty has experience in writing the Damage Inventory in such a way to give maximum flexibility with project formulation and create wiggle room if additional damages are identified after the 60-day deadline. Hagerty will work with the PDMG to logically group projects in the best interest of the Town.

The FEMA PA Delivery Timeline



GROUPING PROJECTS, SITE INSPECTIONS, AND COMPLETION OF ESSENTIAL ELEMENTS OF INFORMATION

It takes expertise, knowledge, tactical decision-making, and programmatic acumen to obtain all the funding that an applicant is entitled to receive. This includes coordination across multiple disaster programs, almost all of which require an application to the responsible federal agency.¹ Hagerty understands these programs and the policies and regulatory requirements that govern cost estimating, engineering design review, project cost accounting, insurance, hazard mitigation, floodplain management, and Environmental and Historic Preservation (EHP) requirements. All these factors must be carefully considered when grouping damages into PA projects.

Conditions of Success

- » Developing robust and fully compliant applications to minimize ineligibility determinations and limit common issues that arise in the administration of the PA Program.
- » Work across federal and state agencies to leverage funding streams to minimize the need for local funds to meet cost share requirements of the PA Program.

In Hagerty's view, projects should be formulated to match the Town's long-term recovery plans and construction plans while accounting for the Town's current systems for documentation and organization. As Hagerty supports the Town, we will review whether the grouped damages are comprehensive and reflective

¹ There are more than 60 federal programs that provide funding to recover from disasters. Each program brings with it its own administrative requirements, and often the policies and regulations between programs do not align.

of the actual impact to a specific facility. If any damage is identified after the 60-day deadline, Hagerty will assist the Town in reporting the additional damage to FDEM and FEMA by preparing and submitting a Late Damage Inventory Request.

Hagerty has extensive experience completing the FEMA site inspection documentation and coordinating with FEMA to ensure all damages are captured. We will coordinate with the PDMG to schedule site inspections for minimally damaged facilities if site inspectors are available. It is Hagerty's experience that FEMA has been overextended for quite some time and as a result, activities such as site inspections can be delayed due to the lack of available site inspectors. To solve this issue if it occurs, Hagerty has developed an **Applicant-Driven Site Inspection** process utilizing licensed engineers and architects contracted with the Town to complete the FEMA site inspection documentation. These costs are captured as Category E expenses, an architecture and engineering soft cost. To complete this process, Hagerty will assess the factors of each disaster (e.g., availability of qualified site inspectors, level of damages to the Town, and type of damages) to advise what strategy will result in the most efficient and expeditious recovery for the Town.

Simultaneously, as site inspections are occurring, Hagerty will continue to collect documentation and information from the various Town departments to populate the Essential Elements of Information (EEI) and the scope survey questions fields within Grants Portal. We have a clear understanding of how the Consolidated Resource Centers (CRCs) like to see documentation organized and the typical naming convention utilized. Hagerty will organize all documentation in this manner to expedite reviews and minimize Requests for Information (RFIs). We will also coordinate with both FEMA and FDEM to ensure all time extensions are submitted well in advance of deadlines.

NAVIGATING ELIGIBILITY AND APPEALS

Hagerty excels at the identification and resolution of eligibility, policy, reimbursement, and overall grant management issues related to the FEMA PA Program, and our strategic process to do so differentiates Hagerty from our competition. We are proactive and innovative, tailoring our solutions to the client's specific priorities, organizational structure, and risks. Hagerty's approach to supporting the Town in navigating these issues is summarized below.

Hagerty Focuses on Eligibility and Risk Assessment in the Project Formulation Process



Clearly outlining eligibility is essential for securing reimbursement by ensuring all work is performed and costs are incurred in accordance with statutory and program requirements. Hagerty understands the intricacies of FEMA's eligibility considerations and will use this knowledge to structure the Town's recovery process in a manner that minimizes the programmatic timeline while maximizing reimbursement. Support will include contract and purchasing documentation review; pre-emptive compliance audits on invoicing, payroll records, activity logs, and other cost documentation; and structuring the project scope of work (SOW) in alignment with program requirements, terminology, and industry standards.

It is Hagerty's goal to avoid the appeal process whenever possible. We do so by **(1)** continuous communication with FEMA; **(2)** escalation of persistent issues within FEMA and FDEM leadership; and **(3)** outlining eligibility arguments in writing clearly to the CRC Specialist assigned to ensure no misunderstanding occurs when information is relayed through the PDMG.

Hagerty will **always** provide an honest opinion on cost eligibility under the PA Program and will advise the Town against submitting costs we do not think will be determined to be eligible. Hagerty finds that the "let's see what happens" approach – submitting all costs versus only those likely to be eligible – results in more negative determinations where FEMA lumps eligible costs within their determination regarding the ineligible costs. We do not believe this is in the best interest of the Town and will focus our efforts in such a way that protects the Town and results in the greatest potential return.

Integrity as a Core Principle

Hagerty's leading core principle is to maintain integrity in all that we do. Hagerty has on multiple occasions advised a client to not pursue an appeal on a FEMA negative determination, and request that the client not issue a task order for Hagerty to perform this work as we did not think there was a significant probability where any appeal could be successful. Hagerty respects that our clients' resources are spread thin after a disaster, and we would like to focus on areas where those resources can result in the most return for the client.

If FEMA does issue a negative determination, Hagerty will provide the Town with a written assessment on the likelihood of an appeal's success. If the Town decides to pursue the appeal, Hagerty will mobilize Hagerty's leading subject matter experts and appeals writers to develop the strongest case possible in effort to secure a full or partial reversal of FEMA's original determination. Upon submission of the appeal to FDEM, Hagerty will track the appeal to ensure the State submits the appeal to FEMA within the required timeframe. Hagerty will continue to track that appeal, answer any requests for information, and regularly inquire regarding its status until formal notification is made.

PROJECT SCOPING, COST ESTIMATING, AND COMPLIANCE REVIEWS

It is critical that the SOWs developed for projects are accurate, clearly written, and complete. Our multi-disciplinary team knows federal disaster recovery programs, design standards, Florida building code, and appropriate construction methods to support the Town with the development of accurate SOWs. Hagerty

always looks for opportunities to add value. Our objective, in collaboration with the Town, is to maximize eligibility and promote resilient reconstruction.

Expedited Funding Requests

Expedited funding allows the Town to quickly receive funding to address immediate needs resulting from the impact of the disaster, including costly debris removal operations and emergency protective measures. Hagerty understands how to effectively organize and present the required information and documentation to secure expedited funding from FEMA and FDEM. In fact, as earlier noted, we have done so for Lee County for a \$12.6 million expedited PW. Hagerty is confident we will be successful in advocating for maximum flexibility for advanced payments through expedited projects for the Town.

As Hagerty supports the Town with project scoping, our professionals will account for important considerations, as further detailed below.

Key Considerations Associated with Project Scoping, Cost Estimating, and Compliance Reviews

Focus Area	Key Considerations
Cost Estimation Accuracy	Cost estimation is essential when designing projects, implementing the Section 428 Program, developing repair-versus-replace analyses, and executing alternate or improved projects under the PA Program. We have an in-depth understanding of FEMA's Cost Estimate Validation Process and FEMA's Cost Estimating Format (CEF) and will work with the Town to ensure all assumptions and considerations are consistent and applicable to the actual conditions of the Town. This includes identifying local costs which most likely exceed RSMeans unit costs, the standard reference for FEMA PA costing specialists, in a post-disaster environment. Hagerty will work with the Town to identify who will develop the Cost Estimate: FEMA, Hagerty, or an architecture and engineering firm engaged to complete repairs or replacement. Hagerty can support the architecture and engineering partners to ensure the cost estimate provides the level of detail FEMA will require. If FEMA is developing the cost estimate, Hagerty can review these estimates to ensure all eligible costs are included.
Hazard Mitigation Projects	Hazard mitigation is critical to increasing resilience. Hagerty is adept at supporting our clients to proactively identify projects with potential mitigation measures under Section 406 and to independently develop Section 404 projects. Our overall goal will be to support identification of Section 406 and Section 404 hazard mitigation opportunities to ensure the maximum amount of funding is allocated to increase resilience. Our approach to supporting hazard mitigation is further detailed in this proposal.

Focus Area	Key Considerations
Special Considerations	Special considerations, such as EHP reviews and in-depth insurance policy analysis are critical throughout the project development process. As Hagerty supports the Town focused on insurance, we will keep an eye to compliance with regulations, assisting the Town throughout the insurance adjustment process to ensure insurance is maximized, and ensure there are no duplication of benefits (DOB). These considerations must be kept in mind immediately after a disaster, so the Town does not engage in work that is later deemed ineligible. Our team will proactively account for and document any special considerations to prevent or mitigate any eligibility issues.

By applying our multi-tiered quality assurance/quality control review process to all projects, we will ensure compliance with FEMA requirements while also accounting for issues that can potentially impact other funding sources available for the Town. Our strict review process has resulted in identification of multi-million-dollar errors in favor of our clients.

Hagerty will coordinate with the Town to ensure local, state, and federal procurement policies are followed and compliant with grant requirements and will assist in the development of emergency and exigency justifications where needed. These efforts will ensure that the Town's project submissions are closeout-ready at the onset and minimize adverse determinations. Throughout the recovery process, Hagerty can make recommendations on how to amend pay and procurement policies to maximize reimbursement and compliance for future disasters.

Process Summary for Efficiently Developing and Closing Federal Grant Applications

- 1 Develop documentation packages for each identified recovery project.
- 2 Perform an integrated Quality Assurance Review to ensure that costs captured are eligible for funding through PA Program.
- 3 Submit completed documentation packed to the Town POC for review and approval. Upon concurrence, submit documentation in Grants Portal and Notify PDMG.

SECTION 428 ALTERNATIVE PROCEDURES, ALTERNATE PROJECTS, AND IMPROVED PROJECTS

In most cases, the PA Program reimburses applicants for the completion of eligible permanent repair work on an actual cost basis. However, there are instances where applicants can be reimbursed based on capped estimates under either Alternate or Improved Projects. Hagerty advises that this option be utilized when the Town does not want to rebuild exactly what was there before the disaster event.

Hagerty will meet with Town leadership to identify their recovery priorities and how the Town wants to build back. Hagerty will use this information to make recommendations on which projects should be standard,

Alternate and Improved Projects, or Section 428 Projects. If executed correctly, the Section 428 Program can provide needed flexibility to build back in a manner that suits the Town.

Alternate Projects and Improved Projects	Section 428 Program
May allow the Town to utilize federal funding in a way that provides greater flexibility and benefit than standard in-kind repairs. Proactive management will allow the Town to make alterations and/or improvements while restoring the damaged facility or even constructing an entirely different facility. The DRRR removed the 10 percent penalty for Alternate Projects.	Authorized by the <i>Sandy Recovery Improvement Act</i> (SRIA) and allows FEMA to make recovery grants for permanent work projects (Categories C through G) based on fixed-cost estimates. Hagerty will support the Town to engage the Section 428 Program, including how to minimize the risk of accepting a capped grant rather than receiving reimbursement on an actual cost basis.

Hagerty will advise on which capped funding approach may work best. Our assessment tools will show the Town the pros and cons of pursuing capped funding, including when the Section 428 Program should be used.

To support development of these fixed-capped grants, we developed a procedure to validate cost estimates, processes for drawdown, and procedures to leverage the full flexibility of the Program. These procedures include a process for streamlining the approval of changes to the SOW for a recovery project from the original scope used to capture costs, allowing the applicant to determine the most effective use of recovery funds. To date, our teams have developed more than **\$5.8 billion** in fixed-capped grants for one client alone.

OBLIGATIONS AND REQUESTS FOR REIMBURSEMENT

Prior to project obligation by FEMA, Hagerty will coordinate with FDEM's designated contractor for the Town to identify a single point of contact for all the Town's projects. As an example, for Hurricane Michael, initially a different individual was assigned to each project which led to inconsistency between contacts and prevented a full understanding of an individual applicant's recovery. Identifying a single point of contact has streamlined the communication between FDEM's contractor and the other applicants Hagerty is serving.

At times, to ensure the timely payout of reimbursements, Hagerty has had to seek intervention from FDEM's Recovery Bureau to ensure the implementation of new policies and procedures by FDEM's contractors. Hagerty will ensure every project has individualized attention to enable timely validation and payouts on reimbursement requests.

In support of the Town, Hagerty will inform FDEM's contractor which projects are soon to be obligated and provide any necessary context for the project to enable a more efficient validation process. Hagerty will develop a reporting and tracking process with FDEM's contractor to ensure the Town has visibility on which Requests for Reimbursement (RFRs) have been submitted, what percentage of the RFR has been reviewed to date, and estimated timeline for reimbursement.

After obligation, Hagerty will submit a RFR for 50 percent of the work completed funds, in accordance with FDEM's process of incremental release of funds put in place in 2019. It is Hagerty's experience that constant

contact and advocacy is needed to ensure these 50-percent funds are released in a timely manner and the remaining 50-percent validation is prioritized. Hagerty will ensure regular reporting from FDEM's contractor is provided on the status of validation and that the contractor is submitting a comprehensive RFI if needed, rather than incremental asks to the Town.

In cases where policy interpretations or insurance reductions affect the project, Hagerty will prepare the Town to defend itself with comprehensive project packages. Even after obligation of an initial version of a project, if costs are still being incurred or new costs are identified, Hagerty will work to amend the previously obligated project.

GRANT CLOSEOUT AND AUDITS

Recovering from a major disaster takes time. Closing out projects in a timely manner is a step toward completing the recovery process. There are proactive steps that can be taken early to make project closeout more efficient and compliant. By structuring grant formulation and administration processes around the Town's internal financial management systems and preparing grant documentation consistently, we can facilitate a streamlined application and administration process that expedites recovery. Depending on the needs of the Town, we are available to support the following project closeout tasks:

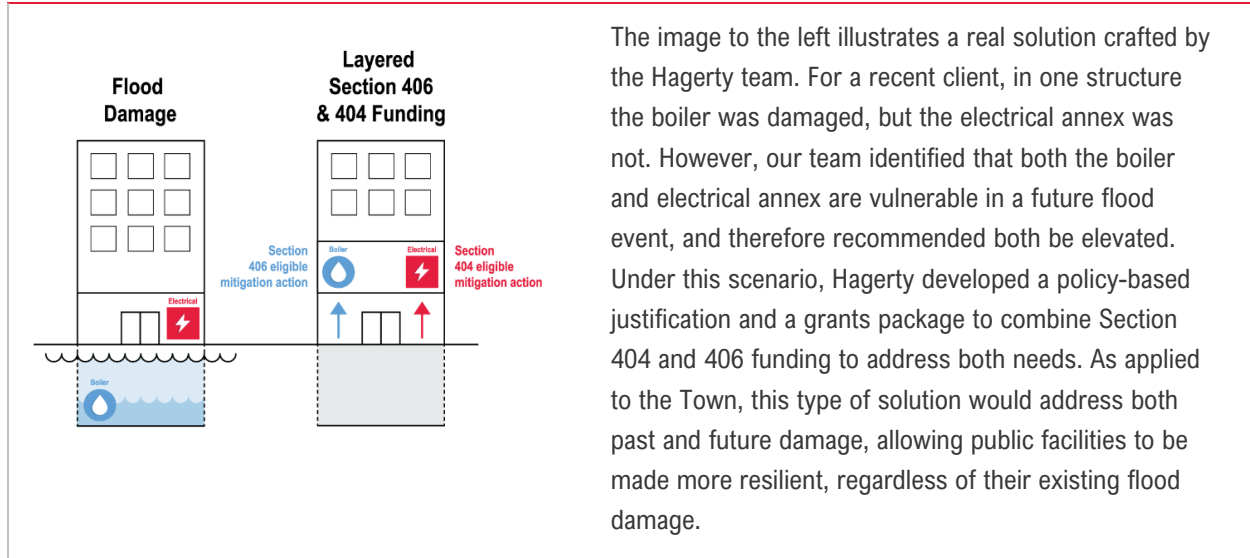
- » Ensuring all damages and costs are accounted for, and that no cost overrun or underrun exists;
- » Developing project completion reports and attestation of DOB forms, and initiating project closeouts;
- » Participating and/or facilitating as needed, final site inspections with FDEM;
- » Analyzing FDEM financial summary reports and FEMA closeout requests to ensure that FDEM's findings and recommendations are reflective and in support of the Town's understanding;
- » Analyzing FEMA PW closeout determinations to determine whether an appeal is warranted; and
- » Conducting a final and complete cost reconciliation on all disaster related costs to ensure all costs are accurately reflected within the Town's financial system and provide clarity to the Town on why certain costs were not able to be claimed for consideration during the next disaster response.

From the very beginning, Hagerty strives to prepare highly detailed, audit-ready projects that contain accurate information at a high level, but also the necessary supporting documentation to validate the information in the project. That effort, combined with thorough document management, has allowed Hagerty clients to avoid adverse audit findings and de-obligations.

Approach to Services: Hazard Mitigation Support

Every permanent work project will be assessed for potential Section 406 mitigation opportunities, on top of the code and standards requirements within the State of Florida. Our professionals understand how to maximize the available mitigation dollars under Section 406 for permanent work under the standard PA Program. We are also adept at the Section 428 Program and alternate projects utilizing the PA Program and Policy Guide Appendix J to seek up to 100 percent on top of the project costs in pre-approved mitigation measures. This funding is key to building back more resilient to limit the impacts of future disasters.

Hagerty's Approach to Mitigation Identifies Opportunities for Layered Funding



Hagerty has extensive experience in navigating FDEM's Three-Tiered approach for the Section 404 HMGP. In Bay County, Florida, Hagerty developed over **\$120 million** in Section 404 HMGP proposals; these projects have now all been awarded and Hagerty is supporting our clients through the construction phase to ensure they are compliance with all grant requirements (e.g., procurement reviews, reporting, developing and submitting RFR).

Approach to Services: Community Development Block Grant – Disaster Recovery Programs

Hagerty has a diverse background in assisting disaster-affected communities eligible to receive CDBG-DR funds for long-term recovery needs following a major disaster. While we know CDBG-DR resources are not currently available to the Town, we also know that these resources will be critical when it comes to long-term recovery – particularly for housing. We understand the CDBG and CDBG-DR Programs, and we can offer the Town the right professionals across all program phases: from informing and influencing the development of an Unmet Needs Assessment (UNA) by Florida DEO to project closeout.

Hagerty's Approach to the Community Development Block Grant – Disaster Recovery Program



The Hagerty team can assist the Town in coordinating with Florida DEO (or other local and regional stakeholders) and federal requirements; designing and implementing programs in housing, infrastructure, economic revitalization; as well as including additional resilient features currently required for the use of CDBG-DR.

UNMET NEEDS ASSESSMENT

To support the allocation of CDBG-DR, the UNA outlines the type and location of community needs. It is critical that the Town communicates with Florida DEO on what the Town's unmet needs are during this phase to increase the likelihood that the limited resources are targeted to those areas with the greatest need. The UNA evaluates three core aspects of recovery: housing, infrastructure, and businesses and the economy. It also considers mitigation and resilience measures through dedicated funding focused on these areas. Our professionals can support the collection of the information below to submit to Florida DEO to ensure the Town's needs are known and advocated for in the UNA process. This step can be performed prior to a HUD CDBG-DR allocation and often times can inform that allocation decision if performed in advance. .

Unmet Needs Assessment Development Focus Areas

	Review Existing Data	Review existing data and reach out to key community partners to obtain updated data, or data not previously collected by the Town. This data will be used to identify disaster recovery needs that are not likely to be addressed by other sources of funds.
	Housing Data	Collect and analyze housing data, including numeric counts and the estimated type of need (e.g., home repair, rent assistance, etc.), estimated amount of financial need, demographic, and other information to identify outstanding housing needs that should be addressed.
	Infrastructure Data	Collect and analyze infrastructure data to determine if there is anything that has not been considered and conduct an analysis of financial sources that could address outstanding unmet needs to ensure all resources are maximized.
	Business Data	Collect and analyze business data, including number and type of businesses impacted, how they are impacted, estimated type of need (e.g., capital repairs, machinery/equipment replacement, etc.) and estimated amount of financial need.
	Mitigation and Resiliency Measures	Consider mitigation and resiliency measures, as well as associated estimated costs.

The result of this analysis will determine if the overall need in each category remains unmet, given all resources already available, as well as those already being pursued. An outstanding gap will be identified, which will then be incorporated in the overall UNA.

ACTION PLAN REVIEW AND APPLICATION DEVELOPMENT

For each disaster, Florida DEO determines which programs they would like to implement to meet the unmet needs identified through the Action Plan development phase. For the last several disasters Florida DEO has

selected to directly implement a housing program for the general public while also initiating grant programs such as the:

- » **Infrastructure Program:** Grants for public infrastructure improvements to increase resiliency to future disasters within or benefiting designated low- and moderate-income areas and populations.
- » **Hometown Revitalization Program:** Grants for local governments to make improvements to commercial areas.
- » **Voluntary Home Buyout Program:** Grants up to \$5 million to purchase homes in areas that repeatedly flood and provide funding to turn the land into green space (e.g., parks) to increase resilience.

Hagerty has expertise in advising clients how to identify the appropriate and most competitive projects for these funds that align with DEO priorities, as well as developing the applications and managing these grants.

Before funding is authorized to be spent, local governments must illustrate through the application phase the connection between the recovery needs and the priorities outlined within Florida DEO's Action Plan. The projects selected and outlined within each application must demonstrate that they:

1. Qualify for CDBG eligibility (or received a waiver);
2. Meet CDBG national objective; and
3. Address direct or indirect impact of disaster.

Hagerty has been very successful in developing and implementing strategies to maximize funding awards. In the first infrastructure awards under the CDBG-DR allocation for Hurricane Michael, Hagerty's two clients eligible to be direct applicants under Florida DEO's procedures for this event, the City of Panama City and Panama City Beach, received a **\$18.9 million** award to repair and increase the capacity of several miles of underground water infrastructure, and a **\$21.3 million** award for a outfalls project. The average award during that round of funding, when not including Panama City and Panama City Beach's awards, was \$3.5 million. Since that initial round of funding was announced, Hagerty has assisted these clients with several more applications under the different CDBG-DR programs resulting in over \$80 million being invested into the water infrastructure and economic recovery of this area.

Grant Compliance, Draw Downs, and Closeout

The CDBG-DR program as crafted by DEO will outline the amount of time the Town will have to complete the SOW outlined within the grants and expend the awarded funding. Hagerty will work with the Town to develop reviews processes to ensure that the Town is compliant with the unique requirements of the CDBG-DR grants (e.g., Davis Bacon compliance and reporting) to ensure all funds expended in the correct manner, tracked sufficiently for reimbursement, and prepare for closeout as the projects are implemented.

6. Management Plan for the Project

Hagerty understands that the key to any project's success is clear and frequent communication with the client and the implementation of proven quality assurance measures. A core component to establishing this open communication is a project kickoff meeting between our PMT and key stakeholders from the Town. The purpose of this meeting will be to confirm the scope of services, timeline, administrative expectations (e.g., reporting and invoicing), review the draft Project Management Plan (PMP) developed from this proposal, and create relationships to guide the project forward. Upon receipt of the notice to proceed, **our proposed Project Manager, Kalindi Fitch**, will work with the Town to identify a date and time for this initial meeting. Our initial project kickoff meeting will also discuss access to web-based documents or plan repositories. A final PMP will be shared two weeks after the project kickoff meeting to incorporate additional information gathered during the project kickoff.

The PMP will serve as a roadmap for the project.

Following the kickoff meeting, Hagerty will revise the draft PMP to incorporate changes and feedback from Town project leads and the assigned project manager. The final PMP will detail the approved approach, schedule, milestones, staffing, and project management tasks.

Project Management

Project management and quality control are important considerations for Hagerty in our support to the Town. Hagerty places an emphasis on sound management practices, transparency, assertive problem solving, and issue resolution to ensure our professionals meet the evolving needs of our clients. The Hagerty PMT will support project management functions, serving as the core work group in project administration and daily management. The PMT will include the project manager, Hagerty team members, and Town stakeholders who will oversee the project. The core tasks associated with our project management approach aim to facilitate two functions.

Hagerty also employs in-house graphics and editorial staff who will be engaged for key deliverable reviews, ensuring templates and design standards are aligned with Town's requirements and that all documents are grammatically accurate.

- » **First**, our team aims to provide an effective management team to work hand-in-hand with the Town to increase transparency into the overall project status, coordinate efforts seamlessly, maintain open lines of communication, and coordinate with identified agencies and stakeholders.
- » **Second**, our team aims to ensure project activities meet local, county, regional, State, and federal rules, regulations, and reporting requirements to maintain compliance with accrediting bodies.

Hagerty understands that a project is a collaborative effort, and to provide the Town with as much visibility as possible, we will conduct bi-weekly status meetings with the PMT and regularly deliver project status reports for the Town's review. Project status reports will cover all activities planned or completed for the

reporting period; a dashboard indicating our assessment of the project's health; a risk and issues section; a decision and considerations section; a deliverables page describing the deliverable; date; action required; owner and status; and a budget analysis showing actual expenditures to date versus budget. The elements of the status reports are discussed at the kickoff meeting with the client.

Within the PMT, task managers will be assigned to execute specific items based on the subject matter expertise required, allowing multiple tasks to progress simultaneously. The table below describes project management tools that Hagerty will use to ensure the PMT and Town remain apprised of the project's status:

Program Management Tools and Tactics

Project Status Meetings	Bi-weekly meetings between the PMT and Town representatives will provide overall updates and seek feedback from project sponsors on crucial issues or decision points.
Status Reports	Monthly written reports that include updates to project timeline and identification of efficiencies or deficiencies by task.
Meeting Facilitation	At each formal project meeting, Hagerty will present an agenda, monitor attendance, and take notes. These records will be shared with the Town to provide visibility.
Microsoft Teams and SharePoint	The PMT will utilize Microsoft Teams and SharePoint throughout the project for overall project management and document management. This resource will include an integrated project schedule accessible for the stakeholder team.
Perfolio	An internal Hagerty management tool that tracks and allocates time associated with projects and specific tasks. Used to track consultant time weekly (with daily/hourly tracking) in support of invoice, budget, and task management.

Our processes focus on executing support in a way that meets or exceeds the expectations of the Town. Careful planning and active monitoring will ensure consistent performance, maintain work quality, timeliness, and result in efficiencies for the Town.

Execute Project

Upon the implementation of quality assurance measures, the Hagerty team will execute project work based on the approved SOW and time schedule. The Project Manager will ensure our flexible and dynamic project management approach is followed. The Hagerty team will work in conjunction with the Town to execute all agreed-upon SOW deliverables with the highest degree of expertise and quality. Upon completion of all SOW elements, the Hagerty project manager will conduct closeout meetings with relevant project stakeholders to ensure that all milestones, timeframes, and expectations have been met. All final project materials will be provided to the client at this meeting, unless amendments need to be administered to fully satisfy the Town.

The following provides the Town with an overview of Hagerty's proposed management plan to support the Town. The specific timelines and sequence of events will be adjusted in collaboration with the Town during the kickoff process based on the activities and progress made to date within the overall recovery timeline.

Task	Staff Mobilization and Demobilization	Deadline for completion	Dependencies
Kick-Off Meeting & Identification of Needs	Project Executive, Project Manager & PA subject matter expert mobilized.	T + 2 Days	Or at discretion of Town
Deployment of Initial Team & Establishment of Data Collection Point of Contact	1-2 Emergency Work Specialists mobilized.	T + 2 days	Or at discretion of Town
Deployment of Additional Key Staffing	2-3 Damage Assessment & Cost Estimator Specialist(s) mobilized.	Ongoing – 48 hours from identification of need by Town or approved recommendation from Hagerty	
Recovery Scoping Meeting		T + 6 weeks to 5 months	Dependent on PDMG availability.
Completion of All Site Inspections	Demobilize Permanent Work Specialists. Cost Estimators would continue to support on an as needed basis remotely.	R** + 0 weeks to 1 year	Dependent on number of damaged sites, complexity of damages, availability of FEMA site inspectors, availability of architects and engineers, FEMA staff turnover, etc. Damage Description and Dimensions (DDD) will be completed iteratively.
Identify Mitigation Needs and Develop 406 and 404 Applications	Mobilize Mitigation Team Lead and Mitigation Specialist. Team on site for project identification but can work remote on as needed bases through project closeout.	T + 6 months	Dependent on Town's interest in pursuing mitigation opportunities and the amount of funds available under Section 404 mitigation.
Completion of All EEs	Number of Documentation Specialists mobilized adjusted to match the level of effort.	R + 1 month to 1.5 years	Dependent on the availability of documentation, construction schedules, and quality of historical documentation (e.g., maintenance records). If the Town is completing construction during the project formulation phase, EEs cannot be submitted until the project is ready

Task	Staff Mobilization and Demobilization	Deadline for completion	Dependencies
			for submission to the CRC. Development of scopes of work and cost estimates cannot commence until after DDDs are codified if utilizing an architect or engineer to cost the project instead of the CRC. EEs will be completed iteratively.
Project Eligibility Reviews		Ongoing at all times at every step	
Recommendations for use of Section 428 Program or Alternate/Improved Projects		Ongoing	Will occur prior to individual project submission to the CRC.
Completion of all SOWs and Cost Estimates		R + 2 months to 1 year 7 months	Dependent on the completion of DDDs, availability of documentation such as building plans and environmental testing reports, and construction schedules.
Request for Reimbursements or Request for Advance Payment for Section 428 Submitted		O*** + 1 week	Dependent on available proof of payment and if work has started. For Section 428 Advanced payments, dependent on availability of construction and payment schedule.
Identify CDBG-DR Opportunities	Mobilize CDBG-DR Lead and Specialist upon Florida DEO Action Plan approval by HUD.	T + ~2 years	Dependent on the amount of funds available.
Closeout	Demobilize staff on an ongoing basis.	TBD	Small project closeout will occur when the last Small Project is completed. Large projects will occur less than 180 days of the individual project deadline.
Reporting		Ongoing	Weekly and Quarterly reports will be provided as well as any other interval requested by the Town.
* T is the start of the Hagerty contract.			** R is the date of the Recovery Scoping Meeting.
			*** O is the date of the individual project obligation.

Acquire Feedback

As management consultants, we have a heartfelt belief that performance can always be improved. For that reason, we embed seasoned project executives and project managers on each project, evaluate individual performance, and ask our clients to evaluate the performance of our teams. These and other actions allow us to identify how we can improve, both individually and collectively, and provide clients with work products and solutions that meet or exceed their expectations. Project closeout meetings and project reviews will be used to collect feedback from the Town.

7. Demonstrated Understanding of the Project

As noted earlier in this proposal, the Hagerty team's understanding of the project is demonstrated in two ways:

- 1) In the wake of Hurricane Michael, Hagerty assisted many of the most impacted communities in their recovery from the storm to include the City of Panama City and Panama City Beach. Through this experience Hagerty understands how to design successful recoveries in the State of Florida and has built and maintained relationships with many of the same stakeholders that the Town may work with for the next five to 10 years including, but not limited to: FEMA Region IV, FDEM, Florida DEO and HUD. This experience cannot be discounted as the Town can expect to negotiate on recovery outcomes with all of these stakeholders. Thus, having a partner with a proven track record in these negotiations is vital.
- 2) Through our current work with Lee County in the response to and recovery from Hurricane Ian, Hagerty provides the Town with a vendor that both knows how to operate within Florida and offers an understanding of the specific recovery issues related to Hurricane Ian.

As the prime contractor to the County, Hagerty and our professionals have been working in the County since September 26, 2022 – prior to Hurricane Ian making landfall. Since then, our professionals have been supporting response operations in the EOC, executing field surveys, and supporting the County and other clients – including the City of Cape Coral – as they begin to navigate the road to recovery. Because of our support to the County, the Hagerty team has been engaged in efforts at both the County and the State levels to support the Town.

Damages Incurred by the Town as Captured by Hagerty's Local Team



Because of our local presence, Hagerty is intimately familiar with the current state and needs of the Town that are a result of the catastrophic damage of Hurricane Ian. We know that all Town infrastructure – including Town Hall, water utilities, and parks – have incurred this level of damage. That damage is in addition to housing, beaches, and local businesses damaged by Hurricane Ian which will have an overall impact on the recovery of the Town, including long-term impacts to the local economy due to the effect on the Town's tax base.

This recovery presents a series of unique challenges to the Town that will come to bear in the weeks and months to come. The level of coordination that is required is significant as the State is taking a highly active role in information collection. Hagerty will support the Town to ensure maximum support is provided for this coordination, including both information sharing to the State and providing the Town visibility into the State's activities. This will be particularly important when it comes to housing recovery within the Town and developing solutions to transition survivors from sheltering to temporary housing and ultimately to permanent repair and re-construction.

With the level and type of damage incurred by the Town, we understand there is a significant potential impact on the local tax base. As Hagerty collaborates with the Town, our professionals will work through the floodplain and substantial damages issues that will be faced as the Town considers housing recovery. Those issues are likely to make it cost prohibitive for individuals and households to rebuild due to the level of mitigation that will be required to build, given floodplain and building code considerations. Hagerty will work with the Town to develop housing strategies and advocate for funding streams that will help residents stay in the area in a safe way that is also compliant with Florida building codes and regulations.

As expenses are mounting due to the response and recovery operation, the Town will need a partner that understands how to obtain reimbursements quickly. This enables vendor payment and allows the recovery to progress. **Working with Lee County, Hagerty has helped secure the first Hurricane Ian Expedited PW for emergency protective measures valued at more than \$12.6 million.** In total, we have supported the County to receive approximately \$20 million in federal recovery funding to date – money that is in the County's account to support cash flow and payments as the recovery is ongoing. Hagerty knows the Town is working with the State on an Expedited PW. Hagerty will identify additional opportunities, through PWs or through programs like FEMA's CDL, to increase cash flow to expedite the Town's recovery to the greatest extent possible.

8. References and Contact Information for Similar Completed Projects

Hagerty knows there is no better evidence of our ability to support the Town than our successful past performance with similar clients. Through more than 20 years of experience supporting emergency management and disaster recovery programs and more than 17 years of experience focused on disaster recovery in the State of Florida, Hagerty has developed a strong reputation for successful recovery program implementation paired with our unique understanding of recovery issues across Florida.

The following provides three references for Hagerty's past performance. This includes the clients Hagerty is currently supporting associated with Hurricane Ian recovery as well as our client in the City of Panama City. Should the Town require any additional information regarding this past performance or additional references, Hagerty will happily provide that information upon request.

LEE COUNTY DISASTER MANAGEMENT SERVICES & HURRICANE IAN SUPPORT

Name of Entity	Lee County Office of Emergency Management
Contact Person Name and Title	Sandra Tapfumaneyi, Operations Section Chief
Contact Person Phone	239-826-5930
Contact Person Email	STapfumaneyi@leegov.com
Mailing Address	2675 Ortiz Avenue, Fort Meyers, FL 33905
Type of Services Provided	Planning support services including cost recovery planning in alignment with F-ROC requirements. Response support and comprehensive recovery support for Hurricane Ian.
Date of Services Provided	December 2019 to Present

CITY OF CAPE CORAL PREPAREDNESS AND HURRICANE IAN SUPPORT

Name of Entity	City of Cape Coral, Florida
Contact Person Name and Title	Alvin Henderson
Contact Person Phone	239-242-3611
Contact Person Email	ahenderson@capecoral.gov
Mailing Address	1115 SE 9 th Ave, Cape Coral, FL 33990
Type of Services Provided	Response and recovery support focused on Hurricane Ian. Preparedness support to include a risk assessment and Community Lifeline review.
Date of Services Provided	June 2021 to Present

CITY OF PANAMA CITY DISASTER RECOVERY CONSULTING SUPPORT

Name of Entity	City of Panama City, FL
Contact Person Name and Title	Mark McQueen, City Manager
Contact Person Phone	850-872-3010
Contact Person Email	mmcqueen@pcgov.org
Mailing Address	501 Harrison Avenue, Panama City, FL 32401
Type of Services Provided	Comprehensive recovery support including FEMA PA, housing, and utility mitigation planning, securing grant funding, and supporting implementation and compliance.
Date of Services Provided	December 2018 to Present

9. Fee Schedule

Hagerty submits the following pricing to the Town for immediate support. Years of experience and educational requirements are interchangeable on a one for one basis. Our rates do not include:

- » Travel costs. Travel costs are typically billed to our clients in alignment with the US General Services Administration (GSA) Federal Travel Regulations.
- » Other direct costs. Other direct costs may include printing and reproduction, facility rental, equipment rental, or refreshments. Other direct costs are identified at an open market rate specific to a project based on the scope of work requirements.

Hagerty offers our services on a time-and-materials basis. Hagerty offers base year pricing, as presented below. These rates will be held firm through the first year of the contract. For any option year, rates will increase based upon changes in the Consumer Price Index (CPI).

Labor Category	Staff Qualifications	Hourly Rate
Senior Project Executive	Experience of fifteen or more years with an advanced degree or fifteen or more years with a bachelor's degree. Demonstrates senior experience in management consulting.	\$250.00
Project Executive	Experience of twelve or more years with an advanced degree or fifteen or more years with a bachelor's degree. Demonstrates senior experience in management consulting.	\$220.00
Senior Subject Matter Expert	Experience of fifteen or more years in a specific subject or industry, or ten years' experience and more than one specialized advanced degree.	\$250.00
Subject Matter Expert	Experience of twelve or more years in a specific subject or industry, or eight years' experience and more than one specialized advanced degree.	\$220.00
Senior Project Manager	Experience of eight or more years with an advanced degree, or ten or more years with a bachelor's degree.	\$185.00
Project Manager	Experience of five or more years with an advanced degree, or eight or more years with a bachelor's degree.	\$160.00
Engineer / Scientist III	Experience of eight or more years plus, at minimum, a college degree in a relevant field (e.g., engineering, biology, ecology, construction management).	\$190.00
Senior Engineer / Planner / Analyst	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g., engineering, biology, ecology, construction management).	\$160.00
Engineer / Planner / Analyst	Experience of one or more years plus, at minimum, a college degree in a relevant field (e.g., engineering, biology, ecology, construction management).	\$115.00

Labor Category	Staff Qualifications	Hourly Rate
Damage Assessment Estimator III	Experience of ten or more years plus, at minimum, a college degree in a relevant field (e.g., cost estimating, construction management).	\$195.00
Senior Damage Assessment Estimator	Experience of six or more years plus, at minimum, a college degree in a relevant field (e.g., cost estimating, construction management).	\$160.00
Damage Assessment Estimator	Experience of one or more years plus, at minimum, a college degree in a relevant field (e.g., cost estimating, construction management).	\$115.00
Financial Management Specialist III	Experience of ten or more years plus, at minimum, a college degree in a relevant field (e.g., accounting, management, finance, information technology).	\$195.00
Senior Financial Management Specialist	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g., accounting, management, finance, information technology).	\$160.00
Financial Management Specialist	Experience of one or more years plus, at minimum, a college degree in a relevant field (e.g., accounting, management, finance, information technology).	\$115.00
Grant Management Specialist III	Experience of eight or more years with a bachelor's degree, or three or more years with an advanced degree.	\$180.00
Senior Grant Management Specialist	Experience of four or more years plus, at minimum, a college degree in a relevant field (e.g., accounting, management, finance).	\$145.00
Grant Management Specialist	Experience of one or more years plus, at minimum, a college degree in a relevant field (e.g., accounting, management, finance).	\$115.00
Recovery Consultant IV	Experience of eight or more years with a bachelor's degree, or six or more years with an advanced degree.	\$190.00
Recovery Consultant III	Experience of five or more years with a bachelor's degree, or three or more years with an advanced degree.	\$170.00
Recovery Consultant II	Experience of three or more years with a bachelor's degree, or one or more years with an advanced degree.	\$150.00
Recovery Consultant I	Minimum college degree.	\$115.00
Analyst	Experience of less than two years with a college degree.	\$110.00
Senior Administrator	Experience of two or more years with no college degree required.	\$80.00
Administrative Assistant	No college degree required.	\$60.00

10. Required Forms

a. Sworn Statement Form

SWORN STATEMENT UNDER SECTION 287.133 (3) (A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES
This form must be signed in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to the TOWN OF FORT MYERS BEACH by

Katie Freeman, Director of Operations

(Print individual's name and title)

for Hagerty Consulting, Inc.

(Print name of entity submitting sworn statement) whose business address is

1618 Orrington Avenue, Suite 201, Evanston, IL 60201

and (if applicable) its Federal Employer Identification Number (FEIN) is

37-1431085

If the entity has no FEIN, include the Social Security Number of the individual signing this Sworn Statement:

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision or any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt of a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime; or

2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of public entity crime.

5. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with legal power to enter into a binding contract and which bids or appeals to bid on contracts for the provision of goods and services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Indicate which statement applies.)

☒ Neither the entity submitting this sworn statement, nor one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officers determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (ATTACH A COPY OF THE FINAL ORDER).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR A CATEGORY TWO OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

(Signature)

Sworn to and subscribed before me this 2 day of
November

2022

2018

Personally known yes

Or produced identification yes

Notary Public-State of Illinois

My commission expires SEPTEMBER 16, 2026

(Printed, typed, or stamped commissioned name of notary public.)

OFFICIAL SEAL
JUDITH R HYNES
NOTARY PUBLIC, STATE OF ILLINOIS
COOK COUNTY
MY COMMISSION EXPIRES 09/16/2026

b. Indemnification Form

The Town did not provide an indemnification form with the solicitation for completion by vendors. Hagerty is happy to review and complete the indemnification form at the Town's convenience. Hagerty also offers the following requests for revision to the Town's indemnification language contained in Section 11 of the RFP and noted below:

11 INDEMNIFICATION Contractor agrees to save harmless, indemnify, and defend Town and their agents, officers and employees from any and all claims, losses, penalties, interest, demands, judgments, and costs of suit, including attorneys' fees and paralegals' fees, for any expense, damage or liability incurred by any of them, or economic loss, including environmental impairment, arising directly from Contractor's breach of contract or negligence of the Contractor in performing the ~~or indirectly on account of or in~~ SPECIFICATIONS OCTOBER 19, 2022 PAGE 18 OF 20 RFP-23-01-AD connection with the Work done by Contractor under this Agreement or by any person, firm or corporation to whom any portion of the Work is subcontracted by Contractor or resulting from the use by Contractor, or by any one for whom Contractor is legally liable, of any materials, tools, machinery or other property of Town. Town and Contractor agree the first \$100.00 of the Contract Amount paid by Town to Contractor shall be given as separate consideration for this indemnification, and any other indemnification of Town by Contractor provided for within the Contract Documents, the sufficiency of such separate consideration being acknowledged by Contractor by Contractor's acceptance and execution of the Agreement. The Contractor's obligation shall not be limited by, or in any way to, any insurance coverage or by any provision in or exclusion or omission from any policy of insurance. ~~The Contractor agrees to pay on behalf of Town of Fort Myers Beach, as well as provide a legal defense for the Town, both of which will be done only if and when requested by the Town, for all claims made.~~ Such payment on the behalf of the Town shall be in addition to any and all other legal remedies available to the Town and shall not be considered to be the Town's exclusive remedy

c. Insurance Certificate



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/8/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hays Companies Inc. 1200 North Mayfair Road Suite #100 Milwaukee WI 53226	CONTACT NAME: Allie Stannard PHONE (A/C, No, Ext): (414)443-0000 FAX (A/C, No): E-MAIL ADDRESS: astannard@hayscompanies.com <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> <tr> <td>INSURER A: National Fire Insurance Co of Hartford</td> <td>20478</td> </tr> <tr> <td>INSURER B: Continental Insurance Company</td> <td>35289</td> </tr> <tr> <td>INSURER C: Valley Forge Insurance Company</td> <td>20508</td> </tr> <tr> <td>INSURER D: Steadfast Insurance Company</td> <td></td> </tr> <tr> <td>INSURER E: American Casualty Co of Reading, PA</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: National Fire Insurance Co of Hartford	20478	INSURER B: Continental Insurance Company	35289	INSURER C: Valley Forge Insurance Company	20508	INSURER D: Steadfast Insurance Company		INSURER E: American Casualty Co of Reading, PA		INSURER F:	
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INSURER D: Steadfast Insurance Company															
INSURER E: American Casualty Co of Reading, PA															
INSURER F:															
INSURED Hagerty Consulting, Inc. 1618 Orrington Ave, Suite 201 Evanston IL 60201															

COVERAGES
CERTIFICATE NUMBER: 22
REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY			6023741069	1/1/2022	1/1/2023	EACH OCCURRENCE \$ 1,000,000
	☐ CLAIMS-MADE ☒ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000
			MED EXP (Any one person) \$ 15,000				
			PERSONAL & ADV INJURY \$ 1,000,000				
GEN'L AGGREGATE LIMIT APPLIES PER:							GENERAL AGGREGATE \$ 2,000,000
	☒ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG \$ 2,000,000
	OTHER:						\$
A	AUTOMOBILE LIABILITY			BUA 6023741055	1/1/2022	1/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	☐ ANY AUTO						BODILY INJURY (Per person) \$
	☐ ALL OWNED AUTOS	☐ SCHEDULED AUTOS					BODILY INJURY (Per accident) \$
	☒ HIRED AUTOS	☒ NON-OWNED AUTOS					PROPERTY DAMAGE (Per accident) \$
							\$
B	☒ UMBRELLA LIAB			6023741072	1/1/2022	1/1/2023	EACH OCCURRENCE \$ 2,000,000
	☐ EXCESS LIAB	☒ OCCUR					AGGREGATE \$ 2,000,000
	☐ DED ☒ RETENTION \$ 10,000	☐ CLAIMS-MADE					\$
E	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			6023741086 \$1M (CA) WC 6023741041 (AOS)	1/1/2022	1/1/2023	☒ PER STATUTE ☐ OTH-ER
C	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N ☐	N/A				E.L. EACH ACCIDENT \$ 500,000
If yes, describe under DESCRIPTION OF OPERATIONS below							E.L. DISEASE - EA EMPLOYEE \$ 500,000
							E.L. DISEASE - POLICY LIMIT \$ 500,000
D	Professional			E0C 4241066-01	1/1/2022	1/1/2023	Each Claim/Aggregate \$ \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER
CANCELLATION

Evidence of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

James Hays/FHALAS

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d. References

LEE COUNTY DISASTER MANAGEMENT SERVICES & HURRICANE IAN SUPPORT

Name of Entity	Lee County Office of Emergency Management
Contact Person Name and Title	Sandra Tapfumaneyi, Operations Section Chief
Contact Person Phone	239-826-5930
Contact Person Email	STapfumaneyi@leegov.com
Mailing Address	2675 Ortiz Avenue, Fort Meyers, FL 33905
Type of Services Provided	Planning support services including cost recovery planning in alignment with F-ROC requirements. Response support and comprehensive recovery support for Hurricane Ian.
Date of Services Provided	December 2019 to Present

CITY OF CAPE CORAL PREPAREDNESS AND HURRICANE IAN SUPPORT

Name of Entity	City of Cape Coral, Florida
Contact Person Name and Title	Alvin Henderson
Contact Person Phone	239-242-3611
Contact Person Email	ahenderson@capecoral.gov
Mailing Address	1115 SE 9 th Ave, Cape Coral, FL 33990
Type of Services Provided	Response and recovery support focused on Hurricane Ian. Preparedness support to include a risk assessment and Community Lifeline review.
Date of Services Provided	June 2021 to Present

CITY OF PANAMA CITY DISASTER RECOVERY CONSULTING SUPPORT

Name of Entity	City of Panama City, FL
Contact Person Name and Title	Mark McQueen, City Manager
Contact Person Phone	850-872-3010
Contact Person Email	mmcqueen@pcgov.org
Mailing Address	501 Harrison Avenue, Panama City, FL 32401
Type of Services Provided	Comprehensive recovery support including FEMA PA, housing, and utility mitigation planning, securing grant funding, and supporting implementation and compliance.
Date of Services Provided	December 2018 to Present

e. IRS W-9

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Hagerty Consulting, Inc.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ► _____ ☐ C Corporation ☒ S Corporation ☐ Partnership ☐ Trust/estate	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions. 1618 Orrington Avenue, Suite 201	Requester's name and address (optional)
6 City, state, and ZIP code Evanston, IL 60201	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
		-			-				
or									
Employer identification number									
3	7	-	1	4	3	1	0	8	5

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ►

Date ► **November 2, 2022**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

f. Proposal Form

PROPOSAL FORM

Town of Fort Myers Beach, Florida

Date: November 2, 2022

The undersigned, hereinafter called "Proposer", having reviewed the scope of services requested and familiarized themselves with the local conditions, nature of the work, and having carefully developed an acceptable method of providing services as described herein, and having carefully examined the form of agreement and contract documents shall furnish all materials, labor, services and any other items for the proper execution of contract number **RFP-23-01-AD** at the proposed price stated within this proposal.

Information for Proposal Fee to be included within the Proposal Format Part II (TO BE FILLED IN)

CONTRACTOR REQUIREMENTS

Acknowledgment is hereby made of receipt of the following addenda issued during the proposal period:

Addendum No. 1 Date 10/24/22 Addendum No. 2 Date 10/31/22

Addendum No. Date Addendum No. Date

(PLEASE TYPE INFORMATION BELOW)

SEAL IF PROPOSAL IS BY CORPORATION

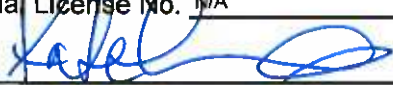
State of Florida Department of State Certificate of Authority

Proposer Hagerty Consulting, Inc.

Document Number F10000003279

By Katie Freeman, Director of Operations

Occupational License No. N/A

Signature 

NOTE: By signing and submitting this Proposal for consideration by the Town of Fort Myers Beach, Florida the vendor acknowledges that they have read, understand and agree to all aspects of the specifications as presented without reservation, exception or alteration.

[if applicable]

Florida DBPR Contractor's License, Certification and/or

Title N/A

Registration No. N/A

Address N/A

Type of Contractor's License, Certification and/or

Registration N/A

Expiration Date N/A

Person to contact concerning this bid:

Katie Freeman, Director of Operations

Phone/Toll Free/Fax 847-492-8454 x119 (Phone)

847-859-1710 (Fax)

Page 2 of 2
RFP-23-01-AD

Town Permits/Fees required for this project: N/A

Home Page Address N/A

Permit Cost N/A

Person to contact for emergency service: Katie Freeman, Director of Operations

Phone/Cell/Pager No. 510-851-2644 (Mobile)

Person to contact for disaster service: Lee Mayfield, Director of Response

Home Address: 12128 Bishopsford Drive Tampa, FL 33626

Home Phone/Cell/Pager No: 239-220-8593

Names and addresses of proposed Subcontractors to be utilized for work on this project:

1. OVID Solutions, 47 Andrew J Hargrett Sr. Rd, Crawfordville, FL 32327

2.

3.

4.

g. Information Sheet for Transactions and Conveyances Corporation Identification

**Information Sheet
for Transactions and Conveyances
Corporation Identification**

The following information will be provided to the Town for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, capitalization, etc. is exactly as registered with the state or federal government.

(Please Circle One)

Is this a Florida Corporation:

Yes or **No**

If not a Florida Corporation,

In what state was it created: Illinois

Name as spelled in that State: Hagerty Consulting, Inc.

What kind of corporation is it:

"For Profit"

or

"Not for Profit"

Is it in good standing:

Yes

or

No

Authorized to transact business in Florida:

Yes

or

No

State of Florida Department of State Certificate of Authority Document No.: F10000003279

Does it use a registered fictitious name:

Yes

or

No

Names of Officers:

President: Stephen H. Hagerty Secretary: Stephen H. Hagerty

Vice President: _____ Treasurer: Stephen H. Hagerty

Director: Lisa Altenbernd Director: _____

Other: _____ Other: _____

Name of Corporation (As used in Florida):

Hagerty Consulting Services, Inc.

(Spelled exactly as it is registered with the state or federal government)

Corporate Address:

Post Office Box: _____

Town, State Zip: _____

Street Address: 1618 Orrington Avenue, Suite 201

Town, State, Zip: Evanston, IL 60201

(Please provide post office box and street address for mail and/or express delivery; also for recorded instruments involving land.)

Information Sheet continued
Page 2 of 2

Corporate Identification

Federal Identification Number: 37-1431085

(For all instruments to be recorded, taxpayer's identification is needed)

Contact person for company: Katie Freeman, Director of Operations

Telephone Number: 847-492-8454 x119 Facsimile Number: 847-859-1710

Name of individual who will sign the instrument on behalf of the company:
Bradley R. Grining

(Upon Certification of Award, Contract shall be signed by the President or Vice-President. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded contractor shall submit a copy of the resolution together with the executed contract to the Office of Purchasing.)

(Spelled exactly as it would appear on the instrument)

Title of the individual named above who will sign on behalf of the company:
Chief Operating Officer

h. Compliance with Federal Law, Regulations, And Executive Orders and Acknowledgement of Federal Funding

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

**Compliance with Federal Law, Regulations, And Executive Orders
and Acknowledgement of Federal Funding**

Certification

This is an acknowledgement that FEMA financial assistance will be used to fund all or a portion of the contract. The contractor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives.

If the Contractor subcontracts any of the work required under this Agreement, a copy of the signed subcontract must be available to the County for review and approval. The Contractor agrees to include in the subcontract that (1) the subcontractor is bound by the terms of this Agreement, (ii) the subcontractor is bound by all applicable state and federal laws and regulations, and (iii) the subcontractor shall hold the County and the Grantor Agency harmless against all claims of whatever nature arising out of the subcontractor's performance of work under this Agreement, to the extent allowed and required by law. The County may document in the quarterly report the Contractor's progress in performing its work under this agreement.

On behalf of my firm, I acknowledge, the grant requirements identified in this document.

Vendor/Contractor Name Hagerty Consulting, Inc.

Date November 2, 2022

Authorized Signature



i. Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY
and VOLUNTARY EXCLUSION**

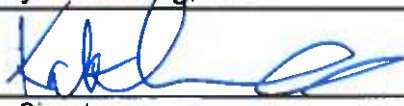
Contractor Covered Transactions

Town of Fort Myers Beach

- (1) The prospective subcontractor of the Sub-recipient, ~~Collier County~~, certifies, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the Sub-recipient's subcontractor is unable to certify to the above statement, the prospective contract shall attach an explanation to this form.

CONTRACTOR

Hagerty Consulting, Inc.

By: 

Signature

Katie Freeman, Director of Operations

Name and Title

1618 Orrington Avenue, Suite 201

Street Address

Evanston, IL 60201

City, State, Zip

EGUJR2HGY9W8

UEI Unique Entity Identifier (for SAM.gov verification)

November 2, 2022

Date

Town of Fort Myers Beach, Florida

Sub-Recipient Name:

~~Collier County Board of County Commissioners~~

DEM Contract Number:

TBD

FEMA Project Number:

TBD

j. Lobbying Certification

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

LOBBYING CERTIFICATION
(To be submitted with each bid or offer exceeding \$100,000)

The undersigned [Contractor] certifies, to the best of his or her knowledge, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form- LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Contractor certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

Hagerty Consulting, Inc.

Contractor (Firm Name)



Signature of Contractor's Authorized Official

Katie Freeman, Director of Operations

Name and Title of Contractor's Authorized Official

November 2, 2022

Date

k. Addendum 1



ADDENDUM TO CONTRACT DOCUMENTS

RFP-23-01-AD

Addendum No.: 1

CONTRACT/PROJECT NAME: Disaster Recovery Consultant Services

DATE OF ISSUE: October 24, 2022

The following information shall be included in the Contract documents and is hereby made part of the project documents in the form of clarification, addition, deletion or revision to the contract requirements, specifications and/or drawings.

CHANGE TO DUE DATE OF DOCUMENTS

The sample contract incorrectly includes a signature (page 80). This oversight should not be construed or interpreted as an award of contract to any proposer. Attached is a clean sample contract.

Please Print

Hagerty Consulting, Inc.; 847-492-8454

Company Name & Phone Number

Signature

Yadzia Roa, Contracts Manager
bids@fmbgov.com
239-765-0202

I. Addendum 2



ADDENDUM TO CONTRACT DOCUMENTS

RFP-23-01-AD

Addendum No.: 2

CONTRACT/PROJECT NAME: Disaster Consultant Services

DATE OF ISSUE: October 31, 2022

The following information shall be included in the Contract documents and is hereby made part of the project documents in the form of clarification, addition, deletion or revision to the contract requirements, specifications and/or drawings.

Clarifications

Q: Could the Town please confirm the proposal due date?

A: Proposals are due on November 3, 2022 by 2 p.m. local time. Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line "SEALED BID: RFP-23-01-AD"

Q: I downloaded the RFP packet for the Disaster Recovery Consultant Services and I cannot seem to locate the Price/Fee schedule within the packet. Could you please direct me to where I can retrieve these documents so I properly return the RFP to you all on November 3rd, 2022?

A: There are no standardized forms, please provide a pricing list deemed fit.

Q: RFP, page 10 - The major delivery services are all reporting service distributions for the area affected by Hurricane Ian- including Fort Myers Beach, FL (zip code 33931). Will the government please allow for electronic submission instead of hard copies?

A: Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line "SEALED BID: RFP-23-01-AD"

Q: RFP, page 19. Certificate of Liability Insurance- Will the Government please provide the intent of this form? It appears to have been already partially completed with information for another Contractor and Client.

A: This is a sample. If awarded a contract, the organization will need to provide a certificate of liability insurance from your insurance carrier naming the Town of Fort Myers Beach as additional insured.

Q: RFP, page 31; Certification Regarding Debarment, Suspension Ineligibility and Voluntary Exclusion- Will the Government please provide the intent of this form?

A: The form is pertinent to the Executive Order 12549- Debarment and suspension.

Q: RFP, page 32 Anticipated Disadvantaged, Minority, Women or Veteran Participation Statement- Will the Government please provide the intent of this form? It appears to be a form for Collier County.

A: That was an oversight on our part. The forms should say Town of Fort Myers Beach. We have no affiliation to Collier County.

Q: page 13- Will the Government please provide additional details for what items should be included in the Management Plan?

A: We are leaving up to the interested vendors to provide.

Q: Will the Government please supply the form to be filled out to the list the 3 references?

A: The Town doesn't have a specific form for references. Please include your 3 references with their contact information as an additional sheet in your proposal.

Q: Will the Government please clarify if they want Contractors to supply reference contracts in 3 separate areas of the proposal? The RFP is asking reference in the following sections:

- Page 3, part 6.c
- Part III. 4.g.
- Part III.8.

A: Yes, all three sections require references, we understand if they are the same references.

Q: For Appendix 1, Exhibit I-8, please confirm whether the stated Data Collection monitoring standards are intended to be required for this solicitation. If yes, the link for the Project Monitoring Standards is not included in Exhibit I-8 of Addendum 1; please provide a link.

A: Please copy and paste the link provided into a web page.

<https://floridadep.gov/sites/default/files/PhysicalMonitoringStandards.pdf>

Q. Many of the forms provided specifically identify Collier County, whereas the Town is in Lee County. Should vendors cross out Collier County and input Lee County or will the Town correct that via addendum?

A: Yes, vendors can cross out and input Lee County.

Q: The RFP states that proposers will submit a fee schedule showing hourly rates for consultant services and hourly rates for education services and an itemized list of all direct and indirect costs associated with the performance of this contract. Are the direct costs considered fully loaded bill rates, and the indirect costs considered other than direct costs?

A: Yes.

Q: Please confirm that vendors need to provide proof of the necessary insurance coverages in the form of a sample certificate of insurance as part of their proposal, and that a certificate of insurance naming the Town as additional insured is only required once an award is made.

A: Yes, that is correct.

Q: Please advise if submitting for the subject RFP via DemandStar through the online portal only is acceptable to the Town, or does the requirement for 1 original, and 4 bound copies stand given the emergency procurement (reduced timeframe to submit)?

A: Currently the Town does not have the ability to use the Demand Star portal. Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line "SEALED BID: RFP-23-01-AD"

Please Print Hagerty Consulting, Inc.; 847-492-8454
Company Name & Phone Number

Signature

Yadzia Roa, Contracts Manager
bids@fmbgov.com
239-765-0202

Attachment 1: Proposed Personnel Resumes

Education

- » Master of Public Administration (MPA), Florida State University, 2013
- » Graduate Certification in Emergency Management and Homeland Security, Florida State University, 2013
- » Bachelor of Arts in International Relations and Religious Studies, University of California, Davis, 2010

Relevant Highlights

- » Coordinated the cost recovery strategy for a large metropolitan local jurisdiction for COVID-19 totaling over \$1.3 billion of FEMA and *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act) funding
- » Oversaw the \$1.2 billion recovery for 14 local jurisdictions for Hurricane Michael
- » Developed strategy to train over 2,600 PA, Mitigation, and EHP assets including FEMA staff and US Army Corps of Engineers (USACE) for Hurricanes Florence, Michael, Harvey, and Irma in coordination with senior leadership from PA cadre management and field leadership
- » Managed and lead a team of 70+ remote instructors to deliver PA training, new PA Model mentoring support, and Grants Manager/Portal training

Professional Biography

Ms. Tanya Shannon is an emergency management professional with 12 years of experience. Ms. Shannon serves as the project manager for local jurisdictions throughout the State of Florida (FL) and other areas overseeing recoveries from natural disasters and Novel Coronavirus (COVID-19). With expertise in the Federal Emergency Management Agency (FEMA) Public Assistance (PA) Program, she has improved the process of and trained professionals in the Section 428 Public Assistance Alternative Procedures (PAAP) Program and Delivery Model throughout the United States (US). Specifically, Ms. Shannon developed curriculum and a training strategy for 1,200 PA, mitigation, and Environmental and Historic Preservation (EHP) staff on Section 428 to support Puerto Rico's recovery from Hurricane Maria, and 1,800 FEMA responders for Hurricanes Harvey and Irma. She supported the setup of PA operations on 116 declared disasters nationwide from 2016 to 2018 coordinating training and strategic planning support for FEMA and state/territory field leadership. She managed a team of 70+ PA instructors imbedded in field operations providing training and technical assistance to FEMA, recipient, and sub-recipient assets.

In addition to her PA training expertise, she is skilled in immigration services project management. Ms. Shannon served as the Director of both the Survivors of Human Trafficking and Immigration Legal Services Programs for the US Department of Health and Human Services (DHHS)-funded Opening Doors Inc. (ODI), where she developed the Emergency Operations Plan (EOP), conducted needs assessments, designed individual action plans, and represented clients before the Department of Homeland Security (DHS) and US Citizenship and Immigration Services (USCIS).

Relevant Professional Experience

Project Executive | Palm Beach County, FL Materials, Training, and Disaster Assessment | Hagerty Consulting, Inc.

- » Managed and oversaw the planning and implementation of programming in support of Palm Beach County's planning for a series of disaster events

Project Manager | Florida Division of Emergency Management COVID-19 Recovery | Hagerty Consulting, Inc.

- » Provided FEMA PA COVID-19 and CARES Act policy subject matter expertise to multiple jurisdictions.

Project Manager | Hurricane Michael Recovery Florida Division of Emergency Management | Hagerty Consulting, Inc.

- » Oversaw the recovery of 14 local jurisdictions in their recovery from Hurricane Michael working with clients to develop their wholistic recovery strategy, layering funding opportunities from FEMA PA, Community Disaster Block Grant – Disaster Recovery (CDBG-DR), FEMA Hazard Mitigation Grant Program (HMGP), and other client specific funding sources to address mental health issues caused by the disaster and addressing the long-term housing issues.

Project Manager | Miami-Dade County COVID-19 Recovery | Hagerty Consulting, Inc.

- » Developed the cost recovery strategy for the County in their financial recovery from COVID-19. This included an analysis of the 19 different grants the client was receiving from federal sources, working with the 20+ department heads to identify the best use of funds in line with leadership priorities, and designing then implementing programs to distribute Coronavirus Relief Funds (CRF) to the public for eligible uses.
- » Oversaw the distribution of \$100 million of CRF funding to municipalities within the client's jurisdiction to reimburse eligible expenses and coordinating the distribution of \$25 million of CRF to cover overdue rent for targeted populations.

Public Assistance Training Section Chief | FEMA

- » Oversaw the recruitment and hiring of 33 full time staff and 40 contract instructors.
- » Supervised the development and implementation of a strategy to increase section to 57 individuals.
- » Developed strategy to train over 800 PA, Mitigation, and EHP assets including FEMA staff and Rehired Annuitant Organization (RAO) USACE for Hurricanes Florence and Michael in coordination with senior leadership from Workforce Development Division (WDD), Center for Domestic Preparedness, cadre management, and field leadership.
- » Developed curriculum and training strategy for Puerto Rico's Hurricane Maria recovery for 1,200 staff on the Section 428 PAAP policy, *Bipartisan Budget Act* authorities, and sector-based approach.
- » Developed training strategy and budget for the implementation of the *Disaster Recovery Reform Act* (DRRA) stipulations and authorities.
- » Served on a temporary assignment as acting PA cadre coordinator, overseeing the management and deployment of the 1,900 PA cadre for all newly declared disasters and Hurricanes Harvey, Irma, and Maria within this period. In addition, oversaw the kickoff of the hiring initiative within the reservist cadre and local hires to compensate for significant staffing shortages.

Public Assistance Training Team Lead | FEMA

- » Developed strategy to train more than 2,000 PA assets including FEMA staff, Technical Assistance Contract, and RAO USACE for Hurricanes Harvey, Irma, and Maria in coordination with senior leadership from WDD, EMI, cadre Management, and field leadership; Supervised a remote team of over 45 instructors dedicated to the training mission requirements set by PA field leadership, and Consolidated Resource Centers (CRCs).
- » Developed mechanism to report assessments of individuals reporting to the Joint Field Offices (JFOs) to ensure field leadership has visibility on the skills of staff reporting.
- » Coordinated with Missouri, Texas, Florida, Georgia, South Carolina, and Louisiana field leadership to provide on-the-ground training support for new PA Model disasters.
- » Served as Key Speaker at 2017 PA Workshop training 50+ states and territories on the new PA Delivery Model.

- » Managed and led a team of 14 remote instructors to deliver FEMA Qualification System (FQS) PA Training, new PA Model mentoring support, and Grants Manager/Grants Portal subject matter expert (SME) support nationwide.
- » Managed the design and regular updating of the PA's seven 508 compliant FQS new Model courses.
- » Developed the strategy and managed the implementation of the "New PA for Recipients and Applicants" course, coordinating with regions and states to enact a force multiplying strategy to train State, Local, Tribal, and Territorial (SLTT) clients on the new PA Model, Grants Portal, and best practices.
- » Developed the strategy and managing of the development of 28 independent studies for the SLTT audience.
- » Developed and managed the Grants Manager/Grants Portal hotline including the recruitment and training of hotline and budgetary requirements and recommendations for PA leadership in meeting blue sky and grey sky training requirements.
- » Trained 1,400 individuals in 70 course offerings between October 2016 and June 2017.
- » Managed the PA training operations at the Atlanta Reception, Staging, Onward Movement, and Integration for Hurricane Matthew, and at the Denton CRC managing a team of 12 individuals and training over 500 individuals in the PA new Delivery Model and old Delivery Model.
- » Developed and implemented a training strategy to train regional staff on PA new Delivery Model incorporating Grants Manager and Grants Portal.

Assistant Reservist Program Manager | FEMA

- » Identified reporting needs for PA cadre, developed methods to procure data via the Deployment Tracking System and other FEMA systems, developed tools to simply and effectively present information, and wrote a Standard Operating Procedure (SOP) manual.
- » Managed data management system for the re-titling of more than 1,500 PA cadre personnel as part of the implementation of the new PA Delivery Model.
- » Trained as Infrastructure Assets Group Supervisor in the National Response Coordination Center and acted in role during FEMA's 2016 Eagle Horizon Continuity of Operations (COOP) Exercise.

Program Coordinator | Center for Disaster Risk Policy at Florida State University

- » Designed recovery portion of the 2015 Florida Statewide Hurricane Exercise Phase 3 Full-Scale Exercise (FSE) and Phase 4 Tabletop Exercise (TTX).
- » Collaborated with Florida Division of Emergency Management's (FDEM's) Bureau of Recovery, FEMA, and Emergency Support Functions (ESFs) with recovery responsibilities and facilitated delivery of federal disaster programs.
- » Researched and analyzed pre and post disaster recovery planning best practices, presented these findings to the exercise design team, and incorporated findings into functional and TTX injects.
- » Provided technical assistance to support exercise personnel in methods to conduct Initial Damage Assessment (IDA) numbers analysis.
- » Prioritized joint Preliminary Damage Assessment (PDA) efforts, better met the needs of the exercise scenario, and identified training requirements prior to the exercise.
- » Designed, wrote, and facilitated functional exercise and TTX from information collected from exercise design team to meet goals set by ESFs, agencies, and 67 county jurisdictions.

- » Introduced use of the online system, Go-To-Training, to facilitate the Phase 4 TTX to engage participating counties more effectively with over 20 state, federal, and non-governmental agencies.
- » Managed the Simulation Cell including, recruitment, coordination, and training of volunteers. The TTX focused on the integration of Recovery Support Functions (RSFs) into state operations and planning, and exercising and/or developing post-disaster redevelopment plans at the county level.
- » Developed classroom curriculum and taught a graduate-level course on emergency management exercise design, leadership and communication, hurricane policies, and business continuity plans.
- » Coordinated with the FDEM's Bureau of Preparedness to offer the Advanced Professional Series (APS) courses, leading to the highest number of APS certification awarded in Florida history.
- » Served as unmanned aircraft liaison officer during grey skies activation. Coordinated with air operations and state small, unmanned aircraft systems assets to improve post-disaster situational awareness.

Research Intern | Government of India, Indian Institute of Public Administration | New Delhi, India

- » Conducted comparative study on disaster management systems at the national, state, and local level between the US and India.
- » Analyzed and drafted recommendations on proposed disaster management legislation the Jammu and Kashmir policy changes to improve mitigation and response effectiveness for isolated populations.
- » Drafted a proposal for the Ministry of External Affairs for the creation of the Centre of International Capacity Development.

Director, Survivors of Human Trafficking Program / Director, Immigration Legal Services Program | Opening Doors, Inc.

- » Provided direct case management services to 111 survivors of human trafficking.
- » Provided direction and guidance to law enforcement officials and victim advocates for post-human trafficking rescue cases. Conducted needs assessments and developed individual action plans for an average caseload of 18 individuals. Coordinated activities and services of 19 local organizations for each case, including the Federal Bureau of Investigations (FBI) and DHS.
- » Collaborated in the development and completion of the EOP with four agencies and the FBI for multiple case human trafficking incidents. Wrote and trained staff and volunteers on SOPs for different human trafficking incident responses.
- » Managed northeastern California's human trafficking emergency phone hotline.
- » Developed and maintained COOP for agency.
- » Advocated for and developed policy for the standardized processing of human trafficking victims' federal benefits at the state and county government level.
- » Provided consultations and rendered immigration legal services for immigrant victims of crime and family reunifications.
- » Represented clients before the DHS, USCIS.
- » Developed program infrastructure, including creating protocols for interns from McGeorge School of Law and University of California, Davis School of Law; intern training; developing and implementing guidelines for caseloads and supervision of staff and volunteers; crafting a fee and payment schedule for services; and fashioning a subsidized funding agreement with Mexican Consulate for Mexican victims of crime.

Tanya Shannon

Project Executive



Employment History

Hagerty Consulting, Inc., Recovery Senior Managing Associate, 2018 to Present

FEMA, Public Assistance Training Section Chief, 2018

FEMA, Public Assistance Training Team Lead, 2016 to 2018

FEMA, Assistant Reservist Program Manager, 2016

Center for Disaster Risk Policy at Florida State University, Program Coordinator, 2013 to 2015

Government of India – Indian Institute of Public Administration, Research Intern, 2013

Opening Doors, Inc., Director, Survivors of Human Trafficking Program. 2008 to 2012

Opening Doors, Inc., Director, Immigration Legal Services Program, 2010 to 2012

Opening Doors, Inc., Intern Coordinator, 2008

Education

- » Master of Business Administration, Rollins College, Crummer Graduate School of Business, 2009
- » Bachelor of Arts, Spanish, Rollins College, 2006

Training / Certifications

- » Project Management Professional (PMP#2016422)
- » Office of Management and Budget (OMB) Uniform Guidance (2CFR200) Trained
- » Notary Public, State of Florida (Comm#GG250890)
- » Tetra Tech Award Recipient (Rookie of the Year – 2010 | Shining Star – 2011)
- » FEMA Independent Study (IS) Courses (IS-1000 thru IS-1027)

Relevant Highlights

- » Direct Management of the following grants:
 - » FEMA Individual Assistance
 - » FEMA Public Assistance (PA)
 - » FEMA Hazard Mitigation Grant Program
 - » United States (US) Department of Housing and Urban Development (HUD), Community Development Block Grant (CDBG) – Disaster Recovery (-DR)/Mitigation (-MIT)

Professional Biography

Ms. Kalindi Fitch is an emergency management recovery expert, achieving progressive career advancement and responsibility over 14 years, including post-disaster grant management experience. She possesses a proven track record of using interpersonal, communication, and organizational skills to lead and improve project and division performance, grow contracts, number of clients, program portfolios, and improve efficiencies and maintain and strengthen client relationships. Her understanding of Federal Emergency Management Agency (FEMA) grant recovery and trainings position her perfectly to assist on disaster cost recovery and relief projects.

Ms. Fitch is a team player with excellent communication skills, high quality of work, driven and highly self-motivated. With Hagerty Consulting, Inc. (Hagerty) she has directly supported recent disasters, including: Novel Coronavirus (COVID-19) emergency relief in Connecticut, Massachusetts, Georgia, South Carolina, Florida, and Texas; Hurricanes Dorian, Michael, Harvey, Irma, and Maria; and wildfires in Ventura County, including the 2017 Thomas and 2018 Woolsey-Hill fires. These deployments, spanning all FEMA regions, directly supported the cost recovery and immediate response to emergencies.

Relevant Professional Experience

Subject Matter Expert | Surfside, Florida Disaster Recovery | Hagerty Consulting, Inc.

- » Supported Miami-Dade County, Florida (FL) in documenting response efforts in a comprehensive after-action report and developed a website to document the key milestones of the response. Hagerty conducted over 80 different interviews with responders and community groups from all disciplines to identify both strengths and areas for improvement.

Subject Matter Expert | Miami-Dade County Disaster Recovery Support and Appeals | Hagerty Consulting, Inc.

- » Supported recovery and appeals work for Miami-Dade County, FL, following Hurricane Irma related to reimbursement and applicable policies for long-term recovery.
- » Assisted in the grant development and status updates of PA projects currently underway in the region, including support for the ongoing COVID-19 pandemic emergency.

- » Undertook development of recovering municipal Coronavirus Relief Fund (CRF) dollars for Miami-Dade following information release about the federal *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act).

Program Director, Disaster Management | ICF

- » Executed disaster management recovery and mitigation programs.
- » Anticipated and met client's needs and strategically positioned the Company's resources and expertise to grow the business.
- » Served as ICF's lead technical advisor and program manager providing implementation services for the Florida Department of Economic Opportunity's \$679.9 million CDBG-MIT program.
- » Provided subject matter expertise and staff training for the North Carolina Office of Recovery and Resiliency's \$160 million CDBG-DR and CDBG-MIT's Strategic Buyout Program and the Texas General Land Office (GLO)'s \$5 billion CDBG-DR Program.
- » Led HUD CDBG-DR technical assistance for American Samoa for their \$23 million award following 2018 severe Storm Gita.

Senior Program Manager and Operational Planner for Post Disaster Programs | Tetra Tech, Inc.

- » Managed a portfolio of 50+ post-disaster federally funded projects with grant awards ranging from \$10 million to \$250 million.
- » Generated year over year growth in sales for the division providing outward facing client management, business development, sales, and marketing.
- » Trained, mentored, and developed a team of 20+ direct reports focused on project execution.
- » Served as subject matter expert for program specific grant guidance and monitoring, reporting, and training staff on changes that impact project execution utilizing FEMA, HUD, and *Disaster Recovery Reform Act* (DRRA) expertise.
- » Recruited and maintained a call-up list of over 60 qualified grant specialists available in a surge capacity.
- » Served as Incident Command Planning Chief for large-scale activations.
- » Managed supplier and subcontractor performance (scope, budget, schedule).
- » Managed and monitored contract performance (scope, budget, schedule), and implemented required corrective action as needed. Synthesized and presented executive level reports to senior management.
- » Worked with IT developers to collect requirements for build- out of proprietary systems.

Consultant, Post Disaster Programs | Tetra Tech, Inc.

- » Managed the collection, reconciliation, digitization, and tracking and reporting of grant specific documentation (over \$400 million in grants specifically assigned).
- » Wrote grant applications and drafted appeals.
- » Drafted programmatic determinations and guidance documents which directly applied to laws, policies, and regulations that govern post-disaster programs.
- » Attended project kickoff meetings, federal and state agency briefings, site visits, and interim status meetings.
- » Conducted homeowner consultations, contractor briefings, public outreach meetings, internal project start-up and demobilization/debrief meetings.

- » Developed technical language and infographics to support proposal development.
- » Attended trade shows as a technical consultant.

Marketing Specialist | Tetra Tech, Inc.

- » Achieved month over month win rate increase as a proposal writer for post-disaster debris monitoring and grant management work (proposal win rates of 80 percent of recompeteted contracts, and 90 percent of new contracts).
- » Performed market analysis inclusive of internal and external forces as well as a detailed review of the competitive landscape.
- » Managed marketing collateral updates and other administrative tasks assigned.

Advisory Analyst | KPMG, LLC

- » Assisted in the development of client requested requests for proposals, satisfaction survey, and quarterly eNewsletter.
- » Supported the preparation and review of invoices prior to client submission for payment.

Employment History

Hagerty Consulting, Inc., Senior Manager, Recovery, 2021 to Present

ICF, Program Director, Disaster Management, 2020 to 2021

Tetra Tech, Inc., Senior Program Manager and Operational Planner for Post Disaster Programs, 2013 to 2020

Tetra Tech, Inc., Consultant, Post Disaster Programs, 2011 to 2013

Tetra Tech, Inc., Marketing Specialist, 2010 to 2011

KPMG, LLC, Advisory Analyst, 2008 to 2009

Education

- » Senior Managers in Government Program, Harvard Kennedy School of Government, 2012
- » Master of Public Administration, George Washington University, 1987
- » Bachelor of Arts, George Washington University, 1983

Training and Certifications

- » Certified Economic Development Professional, National Development Council, 1991

Relevant Highlights

- » 17 years of highly successful experience managing disaster recovery and community
- » Recipient of the Presidential Rank Award (Meritorious Level) for service in the US Government
- » Extensive experience working with HUD
- » Project responsibilities have included managing teams of +140 staff and more than \$90 billion of supplemental appropriations after disasters
- » Directly involved in setting policy for CDBG Program

Professional Biography

For 32 years, Mr. Stan Gimont has been at the center of the United States (US) Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) program. After beginning his career as a presidential management intern at HUD, Mr. Gimont has dedicated his career to HUD and the CDBG program. He has served as director or deputy director of several HUD programs, including the Section 108 Grant Program, the Entitlement Communities Program, CDBG-Disaster Recovery (-DR), and the Neighborhood Stabilization Program. He has been at the center of policy development and change at HUD and has edited every CDBG-DR Federal Register Notice from 2008 to 2019. Mr. Gimont is also an experienced manager of personnel and funds: as Deputy Assistant Secretary, he was responsible for 140 staff members, \$4 billion of annual appropriations, and \$90 billion of supplemental appropriations following disasters. Recently, Mr. Gimont has been providing subject matter expertise and advisory support to Hagerty's clients seeking assistance in managing and administering *American Rescue Plan Act* (ARPA) and Emergency Rental Assistance Program (ERAP) funds.

Relevant Professional Experience

Senior Advisor | Nassau County, New York, Office of Emergency Management American Rescue Plan Act Utilization and Implementation Management | Hagerty Consulting, Inc.

- » Supports the administration of a portion of the \$385 million funding allocation made to the County from the Coronavirus Local Fiscal Recovery Fund (CLFRF) under ARPA to provide Novel Coronavirus (COVID-19) relief.

Project Executive | Montgomery County, Texas, Community Development Block Grant – Mitigation Application Development | Hagerty Consulting, Inc.

- » Supported the preparation of six total CDBG-Mitigation (MIT) applications for funding, including four drainage projects and two infrastructure projects.

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

- » Supported development of a CDBG-DR action plan for the State after the 2019 flooding, bomb cyclone, and straight-line winds.

Project Advisor | Texas General Land Office Alternative Housing Study | Hagerty Consulting, Inc.

- » Advised on efforts to gather, analyze, and evaluate data relating to alternative housing options to determine whether there are innovative, cost-effective, safe, and secure solutions for accommodating disaster survivors.

Regulatory Subject Matter Expert | California Department of Housing and Community Development Community Development Block Grant – Disaster Recovery Grant Management Services | Hagerty Consulting, Inc.

- » Performed grant management and other services relative to disaster recovery programs for the California Department of Housing and Community Development, which received CDBG-DR funds to implement programs to aid in the State's recovery from 2017 wildfires, debris flows, and mudslides.

Subject Matter Expert | Santa Rosa, California, Community Development Block Grant – Disaster Recovery | Hagerty Consulting, Inc.

- » Hagerty coordinated a CDBG-DR needs assessment, action plan, implementation and reporting, and provided assistance with other state and federal grant opportunities associated with disaster recovery.

Deputy Assistant Secretary for Grant Programs | Community Development Block Grant Program Management | United States Department of Housing and Urban Development

- » Oversaw the CDBG-DR supplemental appropriations for long-term disaster recovery with a portfolio of more than 120 open grants and more than \$90 billion of available funds.
- » Edited all CDBG-DR Federal Register Notices from 2008-2019 and was directly involved in setting policy.
- » Represented HUD to outside stakeholders, including the Office of Management and Budget, House and Senate staff, and partner agencies such as the Federal Emergency Management Agency (FEMA), the Recovery Support Function Leadership Group, the Mitigation Federal Leadership Group, and the Federal Permitting Improvement Steering Council.
- » Managed 140 professionals responsible for all facets of the CDBG program, the HOME Investment Partnership Program (HOME), and HUD's environmental compliance efforts.
- » Oversaw \$4 billion of annual appropriations distributed to more than 1,300 jurisdictions nationwide.

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

- » Managed all components of HUD's CDBG program including Entitlement Communities and state programs, the Section 108 Loan Guarantee Program, CDBG-DR grants, and the Neighborhood Stabilization Program.
- » Oversaw the National Disaster Resilience Competition conducted between 2014 to 2016. Coordinated within HUD, working with the Office of General Counsel, Chief Financial Officer, and Policy Development and Research to implement effective programs that deliver benefits to low- and moderate-income communities across the nation.

Director | Community Development Block Grant Entitlement Program | United States Department of Housing and Urban Development

- » Focused on policy development and interpretation activities, implementation of new initiatives, coordination with other HUD programs, and management of headquarters staff to providing program guidance to HUD field staff and grantees.

Deputy Director | Section 108 Loan Guarantee Program | United States Department of Housing and Urban Development

- » Worked with a Wall Street-based underwriting group to finance Section 108 guaranteed loans through public offerings, managed loan portfolio management staff, and resolved findings on major Inspector General audits related to projects in Cleveland and Los Angeles.

Employment History

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

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

United States Department of Housing and Urban Development, Director, Office of Block Grant Assistance, 2008 to 2016

United States Department of Housing and Urban Development, Director, Entitlement CDBG Program, 2004 to 2006

United States Department of Housing and Urban Development, Deputy Director, Section 108 Loan Guarantee Program, 2002 to 2004

United States Department of Housing and Urban Development, Multifamily Housing Specialist, 2001 to 2002

United States Department of Housing and Urban Development, Senior Financial Analyst, 1993 to 2001

United States Department of Housing and Urban Development, CPD Specialist, 1989 to 1993

United States Department of Housing and Urban Development, Presidential Management Intern, 1987 to 1989

Education

- » Master of Science, Florida State University
- » Bachelor of Science, Florida State University
- » Associate of Arts, Gulf Coast State College

Relevant Highlights

- » Recipient of the American Planning Association, Florida Chapter, Best Practices Award of Merit for “Post-Disaster Redevelopment Planning: A Guide for Florida Communities”
- » Served on the Board of Directors for the Florida Housing Finance Corporation
- » Advised the Executive Director on how to solve complex community issues, including the redevelopment of the state in the wake of Hurricanes Irma and Michael

Professional Biography

Ms. Julie Dennis is a disaster recovery and economic development professional with two decades of experience and expertise in the United States (US) Department of Housing and Urban Development (HUD) Community Development Block Grant - Disaster Recovery (CDBG-DR) program. As former Director of the Division of Community Development for the State of Florida (FL) Department of Economic Opportunity (DEO), she created and implemented a plan to distribute over \$1 billion in CDBG-DR funds, designing new recovery programs for disaster survivors. Ms. Dennis also worked closely with the Governor and Cabinet, advising on housing and community development. She developed statewide programs and initiatives, aimed at assisting communities in economic development and building resilience. In addition, Ms. Dennis is the recipient of the American Planning Association, Florida Chapter’s Best Practices Award of Merit for authoring “Post-Disaster Redevelopment Planning: A Guide for Florida Communities.”

Relevant Professional Experience

Owner/Consultant | OVID Solutions

- » Launched a consulting business to help states and communities accomplish their goals for long-term disaster recovery and economic development.
- » Worked with local and state officials to develop a comprehensive unmet needs assessment for Butte County, Town of Paradise, and other impacted communities following the devastating Camp Fire of 2018. This assessment, developed for the State of California, was intended to help guide the allocation of federal and state disaster recovery resources.
- » Developed comprehensive long-term recovery plans for Liberty County, FL and Calhoun County, FL, who were deeply impacted by Hurricane Michael.
- » Assisted with the development and launch of ReHouse Bay, an initiative to guide spending of state housing recovery dollars in the wake of Hurricane Michael to address unmet housing needs in Bay County, FL – where Category 5 Hurricane Michael made landfall.
- » Developed a long-term recovery and resiliency plan for Monroe County in the wake of Hurricane Irma to identify infrastructure projects need to recover from the storm and adapt to future sea level rise in the Florida Keys. This plan also included the documentation of lessons learned and development of a new guide and structure to assist with recovery from future storms.

- » Developed a future post-disaster long-term recovery structure and plan for the City of Hallandale Beach, FL.
- » Assisting with the development of Adaptation Action Areas for Monroe County – a policy tool that can be used for growth management and infrastructure planning to adapt to sea level rise.
- » Secured over \$18 million in CDBG-DR funding for a rural hospital in North Florida to build a new campus to replace the facility that was significantly damaged by Hurricane Michael.
- » Developed successful CDBG-DR applications for projects in Jackson County, the City of Cottondale and City of Bristol in the wake of Hurricane Michael.
- » Provided grant development and management services for two non-profits in Florida focused on marine life education, helping them to secure funding to make their property more resilient and expand their educational offerings.
- » Served as the Economic Development Coordinator for the Wakulla County Economic Development Council.

Director, Division of Community Development | State of Florida Department of Economic Opportunity

- » Led a division which helps cities and counties accomplish their goals through community and economic development. Directed a team of over 100 individuals and managed an annual operating budget of over \$200 million.
- » Advised the Executive Director on how to solve complex community issues, including the redevelopment of the state in the wake of Hurricanes Irma and Michael.
- » Presented critical solutions to challenges in the Florida Keys to the Governor and Cabinet.
- » Served on the Board of Directors for the Florida Housing Finance Corporation, a public-private partnership that allocates hundreds of millions of dollars on an annual basis to support affordable housing needs.
- » Met with Senators and Representatives to help tackle issues in their districts.
- » Worked closely with base commanders and other top-ranked military base officials around the state to address community development and land use needs.
- » Created and implemented a plan to spend more than \$1 billion in disaster recovery funding through CDBG-DR, working closely with hardest hit communities around the state and other partnering agencies. This includes designing and standing up programs that are brand new and building a new team of staff and consultants to support this effort.
- » Developed a proposal for the Governor and Cabinet to solve critical workforce housing challenges in the Florida Keys while ensuring the safety of residents in the event of a hurricane.
- » Streamlined a program to protect military bases by making improvements to the grant application process and establishing better relationships with agencies to address their concerns.
- » Led agency implementation of the National Disaster Recovery Framework (NDRF) following Hurricanes Irma and Michael, focused on housing, community planning, and capacity building.
- » Served on the 2017 Affordable Housing Work Group, a legislatively created task force comprised of state and local elected officials and other housing experts, that affected policy change to address workforce housing across the state.

Staff Director, Division of Community Development | State of Florida Department of Economic Opportunity

- » Functioned as the Chief of Staff for the Division of Community Development, assisting with all aspects of leading a division which helps cities and counties accomplish their goals through community and economic development. Coordinated the division management team to ensure important deadlines are met and projects are accomplished.

Organized events to improve teamwork, collaboration, and integration of the Division. Managed special projects for the Division Director.

- » Connected local organizations to remove barriers to employment and help people get a job through integrating the efforts of local community action agencies and workforce boards.
- » Managed an annual allocation of \$100 million in federal funding to help boost the lives of people who need a hand up and help communities thrive by strengthening infrastructure through the CBDG Program, Low-Income Home Energy Assistance Program, and Weatherization Assistance Program.

Community Program Manager, Division of Community Development | State of Florida Department of Economic Opportunity

- » Developed Competitive Florida, a program that assists rural areas of the state by helping them set realistic goals for advancing their local economy based on unique local assets such as historic downtowns, proximity to interstates or rail and natural resources. To-date, this program has helped 18 communities including Port St. Joe, Gadsden County and the Town of White Springs, create and implement economic development strategies based on their unique features.
- » Secured dedicated state funding for the program which has now been included in the annual budget for four consecutive years.
- » Created a network of community champions across the state that are learning from the efforts of other likeminded individuals.
- » Integrated local community and economic development, workforce development, and community services into a comprehensive locally driven effort.
- » Achieved millions of dollars in grants to small communities across the state to help implement these visions and attract new businesses to their communities.

Planning Analyst, Division of Community Development | State of Florida Department of Economic Opportunity

- » Provided assistance to coastal communities focused on waterfront revitalization, post-disaster redevelopment and sea level rise adaptation planning. Represented the agency and state on the Gulf of Mexico Alliance, the Governors' South Atlantic Alliance and State Hazard Mitigation Advisory Team, and interagency and interstate collaborative efforts to addressing resilience. Worked in partnership with the Florida Division of Emergency Management (FDEM) to help communities plan for long-term recovery in advance of a storm. Advised federal officials on the development of long-term recovery coursework for state and local governments and published articles and presented at national conferences on working waterfronts preservation, sea level rise adaptation and disaster recovery.
- » Spearheaded state efforts to prepare for sea level rise adaptation by creating the Community Resiliency Initiative in partnership with the Florida Department of Environmental Protection that help communities plan for and adapt to increased flooding risk. This effort resulted in local resilience plans and guidebooks for communities.
- » Managed statewide initiative that encourages communities to plan for long-term disaster recovery under blue skies. This model was adapted to create the NDRF, which encourages non- traditional emergency management agencies to collaborate during long-term recovery. In addition, this initiative produced statewide guidance on how communities could incorporate adaptation to sea level rise into redevelopment efforts following major disasters.

Community Planner | CSA Ocean Sciences, Inc.

- » Served as the Tallahassee representative for a marine sciences and planning consulting firm. Focused on the synergies among emergency management, wildfire mitigation and community planning. Managed individual projects and assisted with marketing company services and building client relationships.

Hazard Mitigation Planner | Federal Emergency Management Agency Region IV

- » Managed the review of local hazard mitigation plans to meet the requirements of the *Disaster Mitigation Act of 2000* and provided technical assistance to local governments throughout the Southeastern United States. Participated in the response and long-term recovery efforts for the Florida 2004 Hurricane Season – the second largest disaster declaration in the history of the United States.

Employment History

Ovid Solutions, LLC, Owner/Consultant, 2019 to Present

Florida DEO, Planning Analyst/Manager/Staff Director/Director, 2009 to 2019

CSA Ocean Sciences, Inc., Community Planner, 2005 to 2009

Federal Emergency Management Agency Region IV, Hazard Mitigation Planner, 2005 to 2006

Florida Department of Community Affairs, Intern, 2003 to 2004

Bay County Planning and Zoning, Intern, 2002

Education

- » Master of Public Administration, New York University, 2007
- » Bachelor of Science, Rutgers College, 2002

Training and Certifications

- » Certified Emergency Manager (CEM)
- » Certified Business Continuity Professional (CBCP)
- » Master Exercise Practitioner (MEP)
- » FEMA Professional Development Series
- » Homeland Security Exercise and Evaluation Program (HSEEP) certified
- » Incident Command System (ICS) Train-the-trainer certified

Relevant Highlights

- » Experienced disaster mitigation, preparedness, and recovery planner
- » More than 14 years managing complex domestic and international response and recovery projects
- » Founded and managed a global disaster relief non-profit organization

Professional Biography

Ms. Amelia Muccio is an emergency management and public health program manager with 17 years of experience strategizing and leading national and international mitigation, preparedness, response, and recovery projects. Ms. Muccio has worked on all-hazards planning and policy development, grants management and evaluation, capacity building, *Robert T. Stafford Disaster Relief and Emergency Assistance Act* (Stafford Act) Sections 404/406 mitigation, continuity of operations, training, and exercises.

Ms. Muccio has experience as a project leader and subject matter expert in support of cost recovery work related to a series of grants and funding sources. She directly supported the resiliency and consequence assessment efforts of 16 city agencies for New York City (NYC) during immediate Hurricane Sandy recovery needs. Between August 2013 and May 2015, Ms. Muccio spearheaded the submission of an \$860 million Hazard Mitigation Grant Program (HMGP) Section 404 portfolio on behalf of the city as part of larger risk management and preparedness efforts. For Section 406, Ms. Muccio oversees the mitigation recovery effort for city agencies with a continuously expanding portfolio valued at \$2.2 billion. Hazard mitigation programs of 404 and 406 are under the Federal Emergency Management Agency (FEMA) purview.

Before joining Hagerty Consulting, Inc. (Hagerty), Ms. Muccio served for five years as the Director of Emergency Management for the New Jersey Primary Care Association. In this position, she created statewide planning initiatives stressing ambulatory emergency preparedness and criticality assessments as a vital component to national and economic stability.

Relevant Professional Experience

Hazard Mitigation Assessment Advisor | California Governor's Office of Emergency Services Surge Capacity Staffing | Hagerty Consulting, Inc.

- » Provided project management support to the California Governor's Office of Emergency Services (Cal OES) Hazard Mitigation Branch and the Hagerty Mitigation Team.
- » Assisted Cal OES on their 2020 Building Resilient Infrastructure and Communities (BRIC) submission; California was awarded approximately \$100 million, the highest allocation in the United States.

Amelia Muccio, CEM, CBCP, MEP

Subject Matter Expert



- » Managed a team of project specialists assigned with overseeing approximately 230 obligated hazard mitigation projects totaling \$880 million in project costs.
- » Reviewed and adjudicated 750 Notices of Interests (NOIs) and subapplications, and provided a technical review for programmatic, feasibility, and Environmental and Historic Preservation (EHP) components totaling \$4.23 billion in costs.
- » Provided implementation expertise for inception of the PrepareCA Jumpstart initiative, which yielded 59 applications totaling \$38.9 million in project costs.
- » Developed and delivered over 110 capacity building webinars for Cal OES staff and eligible sub applicants on the Hazard Mitigation Assistance Program (HMAP).

Mitigation Subject Matter Expert | Montgomery County, Texas Pre- and Post-Disaster Support | Hagerty Consulting, Inc.

- » Provided support for Hagerty teams currently supporting pre-and post-disaster support related to the Novel Coronavirus (COVID-19) emergency and concurrent disaster events.
- » Oversaw and developed debris monitoring operations, HMGP applications, Community Development Block Grant – Disaster Recovery (CDBG-DR) and Mitigation (-MIT) applications, and COVID-19 response management.

Project Manager/Team Lead | New York City Office of Management and Budget Hurricane Sandy Recovery | Hagerty Consulting, Inc.

- » Managed 10-person team and coordinated with NYC agencies on technical assistance issues including Project Worksheet (PW) development and hazard mitigation.
- » Developed proposals, cost effectiveness determinations, Request for Information (RFI) responses, campus-based mitigation solutions, 428 Alternative Procedures, and programmatic eligibility.
- » Submitted an \$860 million HMGP portfolio.
- » Oversaw Section 406 expanding portfolio valued at \$2.2 billion.

Project Manager | New York City Office of Management and Budget Hurricane Sandy Recovery, Section 404 Hazard Mitigation Grant Program | Hagerty Consulting, Inc.

- » Managed 17-person team during the Letter of Intent (LOI) and initial application phase; coordinated with city agencies for technical assistance issues including scope of work changes, benefit-cost analysis (BCA), RFI responses, EHP, advance assistance application requests, and technical feasibility.
- » Developed 43 HMGP applications for NYC agencies. Provided ongoing technical assistance to NYC for HMGP applications.

Senior Project Manager | Nebraska Emergency Management Agency Mitigation Services Contract | Hagerty Consulting, Inc.

- » Assisted with the immediate implementation and administration of the HMGP for DR-4420 and the FEMA Hazard Mitigation Assistance (HMA) programs generally. Directed technical assistance on application review, technical reviews of BCA, EHP compliance, and procedural improvements for the implementation of the State mitigation program.

Subject Matter Expert | City of Panama City, Florida Disaster Recovery | Hagerty Consulting, Inc.

- » Reviewed project with the city leadership and engaged the citizenry to develop the city's long-term recovery plan to make the city the premier location in the Florida Panhandle.

Amelia Muccio, CEM, CBCP, MEP

Subject Matter Expert



- » Developed engagement events with the public through the early summer of 2019 to identify how people want to build back the city, taking advantage of the FEMA 428 alternative procedures to remove severely damaged buildings that were not being fully utilized to create more green spaces and community areas.

Director, Emergency Management | New Jersey Primary Care Association

- » Directed emergency management planning activities of 1,600 employees in launching all-hazards preparedness program.
- » Secured million-dollar Tamiflu donation and led swine flu (H1N1) dispensing and inventory responsibilities for 20 Federally Qualified Health Centers (FQHCs) during the H1N1 pandemic.
- » Integrated emergency preparedness, developed standard operating procedures/guides (SOPs/SOGs), provided annual training/exercise activities, and tailored continuity of operations (COOP) plans, and business continuity plans.
- » Trained 5,000+ health care professionals in the National Incident Management System (NIMS), Incident Command System (ICS), National Response Framework (NRF), COOP planning, novel pandemic influenza, infection control, personal protective equipment, fit-testing and behavioral health awareness.

Cities Readiness Initiative Exercise and Training Consultant | City of Portland Department of Health and Human Services

- » Coordinated Portland's Cities Readiness Initiative (CRI) training and exercise program designed to maximize response capabilities during large scale public health emergency.
- » Planned, conducted, and evaluated CRI training and exercises focused on mass prophylaxis and point of distribution (POD) effectiveness.

Director, Haiti Project and Disaster Operations | Humane Society International

- » Provided emergency management, international development, and public health expertise to ongoing recovery projects in Japan and Haiti; provided direct, field oversight in Haiti to staff of 12.
- » Coordinated field disaster response and zoonotic disease surveillance for Haitian veterinarians including 2012's Tropical Storm Isaac and Hurricane Sandy.
- » Advised Haitian Ministries on emergency management; developed first all hazards disaster preparedness training for high-ranking government officials.

Employment History

Hagerty Consulting, Inc., Director of Mitigation, 2017 to Present

Hagerty Consulting, Inc., Senior Managing Associate, Recovery, 2013 to 2017

The Humane Society of the United States, Director, Haiti Project and Disaster Operations, 2011 to 2013

ATCS, P.L.C., Emergency Management Planning Specialist, Consultant, 2011

City of Portland Department of Health and Human Services, Consultant, 2010 to 2011

New Jersey Primary Care Association, Director of Emergency Management/Bioterrorism Educator, 2004 to 2011

The Humanitarian Project, Founder/Executive Director, 2004 to 2010

Education

- » Master of Public Administration and Policy, Florida State University, 2008
- » Graduate Certificate, Emergency Management and Homeland Security, Florida State University, 2008
- » Bachelor of Science, Business Administration – Economics, University of Florida, 2004

Training and Certifications

- » Certified Emergency Manager (CEM)
- » Emergency Management Accreditation Program (EMAP) Manager

Relevant Highlights

- » Program Committee Chair, Florida Governor's Hurricane Conference, 2021 to Present
- » Bob Lay Emergency Management Award, Florida Governor's Hurricane Conference, 2018
- » Chad Reed Emergency Manager of the Year Award, Florida Emergency Preparedness Association, 2017
- » Certificates of Recognition for support of Operation Haiti Relief and Deepwater Horizon Response

Professional Biography

Mr. Lee Mayfield is a proven emergency management leader with more than 15 years of experience in disaster planning, response, and recovery, specializing in state and local coordination, training and exercise, mass care, evacuation prioritization, and crisis response.

Prior to joining Hagerty Consulting, Inc. (Hagerty) as Director of Response, Mr. Mayfield served as the Director of Public Safety and Emergency Management for Lee County, Florida, where he oversaw the county's response to and recovery from Hurricane Irma in 2017. This event included the largest evacuation in the area's history as well as the largest single-county sheltering operation within the State of Florida. Following Hurricane Irma, he coordinated a multi-jurisdictional effort, applying for and securing approximately \$40 million in Hazard Mitigation Grant Program (HMGP) funding.

Mr. Mayfield has led numerous emergency response operations associated with a wide variety of natural and man-made hazards. These include a significant cyber incident; numerous severe flooding and tropical weather events; and, most recently, the Novel Coronavirus (COVID-19) pandemic. Prior to his local government service, Mr. Mayfield worked for the Florida Division of Emergency Management (FDEM) in a variety of positions including as a state regional coordinator focused as a liaison between counties. In this role, he responded to events including the Deepwater Horizon Oil Spill, repatriation of United States (US) citizens from Haiti post-earthquake, numerous severe weather incidents, and National Special Security Events (NSSEs).

Relevant Professional Experience

Emergency Management Subject Matter Expert | California Department of Public Health Surge Capacity Staffing | Hagerty Consulting, Inc.

- » Provided operational and project management leadership and support to COVID-19 response project based in Southern California.
- » Supported the overall build-out of a response staff augmentation team to include Incident Management Team (IMT) and field-based emergency management professionals.
- » Managed an initial team of professionals in support of the California Department of Public Health (CDPH) COVID-19 mission and priorities.

Director | Lee County, Florida Public Safety and Emergency Management

- » Co-led Department of Public Safety and oversaw the Division of Emergency Management serving a community of 800,000; interfaced daily with senior County and State leadership.
- » Coordinated day-to-day public safety/emergency management priorities, including budget oversight.
- » Served as Director/Incident Commander for all Emergency Operations Center (EOC) activations and as primary public/media spokesperson for emergency management day to day and during EOC activations, including as emergency management lead on all Hurricane Irma response and recovery efforts.
- » Coordinated numerous planned and unplanned events/incidents to include Very Important Person (VIP) visits, large public events, flooding, severe weather, wildfires, hurricanes, and public health events.
- » Served as Local Mitigation Strategy (LMS) Working Group Chair post-Hurricane Irma, leading county-wide efforts to develop, vet, apply for, and implement approximately \$40 million of grant opportunities.
- » Coordinated with county leadership on all other emergency management grant opportunities.

Planning Chief/Manager | Lee County, Florida Public Safety and Emergency Management

- » Supervised the Planning Section and staff responsible for the special medical needs program, healthcare facility planning, Comprehensive Emergency Management Plan (CEMP) and Annexes, LMS, HMGP and evacuation, storm surge planning, and decision-making.
- » Oversaw 2017 LMS update contract with vendor; instructed numerous trainings community-wide.

Emergency Management Coordinator/Emergency Operations Center Operations Chief | Collier County, Florida Bureau of Emergency Services/Emergency Management

- » Managed and provided leadership to the emergency shelter operations program (staffing, logistics, interagency coordination).
- » Maintained National Incident Management System (NIMS) compliance county-wide.
- » Served as Operations Section Chief in the EOC during incidents, maintaining the operational readiness of the EOC.
- » Managed county-wide training efforts and programmatic grants management.
- » Conducted EOC staff team building and other roles including significant day-to-day and EOC activation support to Planning and Logistics Sections.

Regional Coordinator | Florida Division of Emergency Management – Response Bureau

- » Served as the State Emergency Management liaison to FDEM Region 6/Southwest Florida and supported 10 counties in all areas of emergency management.
- » Responsible for grants/funding support, training and exercise support, EOC activation support during incidents, additional special projects that required extensive regional collaboration, and group facilitation and coordination with FDEM staff.

Operations Officer | Florida Division of Emergency Management – Response Bureau

- » Monitored events/incidents in Florida's 67 counties. Initiated state assistance as needed. Maintained operational readiness of the state EOC and coordinated with all 18 Emergency Support Functions (ESFs) and counties during incidents.

Comprehensive Emergency Management Plan and Florida Catastrophic Planning Project Lead | Florida Division of Emergency Management – Preparedness Bureau

- » Served as the project lead on the Florida Catastrophic Planning Project. Coordinated with subject matter experts across all aspects of emergency management on a comprehensive, all-hazards catastrophic disaster plan focused on how state, local, and federal governments would respond and recover when resources are overwhelmed.
- » Reviewed local CEMPs submitted by local jurisdictions per Florida Statute.

Employment History

Hagerty Consulting, Inc., Director of Response, 2021 to Present

Lee County, Florida Public Safety and Emergency Management, Director, 2017 to 2021

Lee County, Florida Public Safety and Emergency Management, Planning Chief/Manager, 2014 to 2017

Collier County, Florida Bureau of Emergency Services/Emergency Management, Emergency Management Coordinator/Emergency Operations Center Operations Chief, 2011 to 2014

Florida Division of Emergency Management – Response Bureau, Regional Coordinator, 2009 to 2011

Florida Division of Emergency Management – Response Bureau, Operations Officer, 2008 to 2009

Florida Division of Emergency Management – Preparedness Bureau, Comprehensive Emergency Management Plan and Florida Catastrophic Planning Project Lead, 2007 to 2008

Presentations and Publications

Speaker/Presenter at Florida Governor's Hurricane Conference, Multiple Years

Speaker/Presenter at Florida Emergency Preparedness Association Meetings and Conferences, Multiple Years

Education

- » Master of Public Administration, Humphrey School of Public Affairs, University of Minnesota, 1987
- » Bachelor of Arts, Biology, University of St. Thomas, 1980

Relevant Highlights

- » More than 30 years of experience in government financial management, tax policy, and revenue estimation
- » Over ten years of experience in federal recovery grant programs, including CBDG-DR
- » Extensive project management experience
- » Current Workforce Subcommittee Vice Chair and Former Response & Recovery Subcommittee Vice Chair, FEMA National Advisory Council
- » Successfully led internal advocacy for the creation of a NYC entity to provide insurance support for the City's On-Call Emergency Contractor program and other disaster related insurance support
- » Several board leadership roles on New York Management Benefits Fund Advisory Board, NYC Audit Committee, and NYC Deferred Compensation Board

Professional Biography

Mr. John Grathwol has over 30 years of experience in financial management and forecasting in the nation's largest city, New York City (NYC). In NYC he directed more than 70 analysts in the NYC Office of Management and Budget (OMB) responsible for the management of large parts of the city's \$95 billion plus annual budget. During his tenure, Mr. Grathwol managed NYC's federal recovery grant programs after Hurricane Sandy, which included winning the approval of more than \$10 billion in Federal Emergency Management Agency (FEMA) grants and more than \$4 billion in United States (US) Department of Housing and Urban Development (HUD) grants.

Mr. Grathwol has extensive experience with FEMA Public Assistance (PA), Hazard Mitigation Grant Programs (HMGP), and HUD Community Development Block Grant-Disaster Recovery (CDBG-DR) programs. Over the past three years Mr. Grathwol has served in management consulting capacities supporting FEMA management at agency headquarters (HQ) and as a project executive for several Hagerty Consulting, Inc. (Hagerty) teams across the country. In addition to his project and financial management experience, Mr. Grathwol is seasoned in policy impact analysis and providing public testimony before government bodies.

Relevant Professional Experience

Project Executive | Arkansas Department of Finance and Administration Coronavirus Aid, Relief, and Economic Security Act Funds Management | Hagerty Consulting, Inc.

- » Senior advisor to consultant team supporting the delivery of *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act)/Coronavirus Relief Fund (CRF) and *American Rescue Plan Act* (ARPA) funded initiatives by the State of Arkansas in its statewide response to the Novel Coronavirus (COVID-19) public health emergency.
- » Advised client on US Treasury eligibility and regulatory requirements; supported the design and implementation of internal control systems; and assisted the State in the delivery of funding to impacted subrecipients.
- » Supported the ongoing implementation of CRF and ARPA funded programs.

Project Executive | Wyoming Office of Homeland Security, Wyoming, COVID-19 Recovery Support | Hagerty Consulting, Inc.

- » Senior advisor to consultant team developing FEMA grant strategy for expenses originally funded by the more flexible CARES Act/CRF funding.
- » Advised client on FEMA PA Program rules and regulatory requirements, documentation requirements, and FEMA engagement strategy.
- » Led the Wyoming Department of Homeland Security to win approval for FEMA grants totaling \$61 million, allowing CRF funding to be re-programmed to activities not eligible for FEMA funding before the expenditure deadline for CRF grants.

Expert Consultant | FEMA Recovery Directorate – Public Assistance Division

- » Served as lead directing a PA and Individual Assistance (IA) analyst team responsible for the development of non-congregate sheltering policy to support operations in consideration of COVID-19.
- » Supported an inter-agency FEMA/HUD team developing coordination of benefits policy allowing for the simplified application of HUD CDBG-DR funds to the FEMA PA required non-federal cost share.
- » Supported development of other initiatives including implementation of the new COVID-19 PA application process.

Deputy Director - Budget Resources, Accounting Services, and Recovery Grant Management | New York City Office of Management and Budget

- » Advised budget director on the management of NYC's annual operating budget valued at more than \$95 billion and contributed to the development of critical budget documents.
- » Directed the development of the city's \$10 billion in FEMA grant claims for reimbursement of Hurricane Sandy-related damages across 54 city agencies. Managed NYC's relationship with FEMA.
- » Directed a team leading financial management and compliance monitoring for \$4.2 billion in HUD-funded disaster recovery programs.
- » Managed OMB's accounting services unit to resolve issues, including interfund borrowing. Prepared analyses of the budget impact of federal and state law changes. Testified on behalf of the administration at City Council hearings.

Deputy Director - Budget Resources, Accounting and Workforce | New York City Office of Management and Budget

- » Advised the Budget Director on the management of the city's budget. Launched teams responsible for managing the development and approval of the city's FEMA grant portfolio across 54 city agencies and for directing the financial management and compliance monitoring for \$4.2 billion in HUD-funded disaster recovery programs.
- » Managed the unit conducting cost analyses for collective bargaining with the city's more than 350,000 unionized workers. Directed the unit analyzing required city contributions to its pension funds. Supervised the team responsible for managing, budgeting, and forecasting the city's \$7 billion miscellaneous revenue budget.

Assistant Director - Tax Policy, Economic Forecasting Task Force | New York City Office of Management and Budget

- » Led 14 analysts in preparation of the city's \$65 billion tax revenue budget and advised the Budget Director on forecast risks, tax policy, and current economic issues.
- » Developed policy recommendations and estimates of tax law changes; evaluated the revenue impact of economic development proposals.

- » Calculated the city's constitutional debt limit and operating limit. Defended city tax forecasts before fiscal monitors, presented to investors, and testified at City Council hearings.

Deputy Assistant Director - Tax Policy, Economic Forecasting Task Force | New York City Office of Management and Budget

- » Directed ten analysts in preparing the city's revenue budget and developed policy responses and revenue estimates for policy changes. Served on the management team structuring debt and tax lien securitizations.

Unit Head - Tax Policy, Economic Forecasting Task Force | New York City Office of Management and Budget

- » Directed four analysts in forecasting the city's economically sensitive tax revenue budget, e.g., business income and sales taxes. Supervised the design of a variety of econometric tax revenue forecasting models.

Supervising Analyst - Tax Policy, Economic Forecasting Task Force | New York City Office of Management and Budget

- » Directed three analysts in forecasting personal and business income tax revenue. Reduced the unit's annual forecast error from seven percent to one percent over four years.

Senior Tax Analyst - Tax Policy, Economic Forecasting Task Force | New York City Office of Management and Budget

- » Designed rates and performed forecasts for two personal income tax rate increases totaling over \$1 billion.
- » Developed a new model that accurately forecasted the impact of city, state, and federal tax law changes on the city's personal income tax, the city's \$1.2 billion bank tax, and \$1.8 billion unincorporated business tax.

Employment History

Hagerty Consulting, Inc., Independent Contractor, 2019 to Present

Federal Emergency Management Agency, Recovery Directorate – Public Assistance Division, 2020

NYC Mayor's Office of Management and Budget, Deputy Director of Budget Resources, Accounting Services, and Recovery Grant Management, 2011 to 2019

NYC Mayor's Office of Management and Budget, Assistant Director/Deputy Assistant Director, 1997 to 2011

NYC Department of Parks and Recreation, Budget Analyst, 1987 to 1988

The Earl Craig Company, Management Consultant, 1984 to 1987

Presentations and Publications

A Case for the Budget Office as Local Government Lead for Disaster Recovery: Lessons Learned from NYC After Hurricane Sandy, Grathwol, John, Government Finance Review Volume 35, No. 4, 2019

Education

- » Bachelor of Arts, Indiana University College of Arts and Sciences, 2012

Training and Certifications

- » Professional Certificate in Municipal Finance, The University of Chicago Harris School of Public Policy, 2018

Relevant Highlights

- » Worked on the two largest financial crises in United States (US) history
- » Experience advising elected and senior appointed government officials
- » Fiscal management reform and restructuring expertise
- » Focused on helping governments transform and rebuild their operations during critical crises
- » Experienced consulting professional with dedicated public service focus

Professional Biography

Mr. John H. Hageman is a senior manager at Hagerty Consulting, Inc. with 10 years of demonstrated experience in strategic management, public sector finance and administration, and restructuring and turnaround. Mr. Hageman has a proven track record of planning and implementing transformational change, leading and empowering high performing teams, and strengthening organizational and staff capacity. He previously served as the Chief of Staff for the City of Detroit's Office of the Chief Financial Officer, helping to lead the city's successful financial recovery and reform post-bankruptcy. Immediately prior to joining Hagerty, he worked on Puerto Rico's fiscal crisis, helping to develop strategies to improve the commonwealth's financial management operations. In his current role, he provides leadership and guidance on Hagerty's *American Rescue Plan Act* (ARPA) service offering.

Relevant Professional Experience

Program Manager | State of Maryland Department of Budget and Management, American Rescue Plan Act Administration and Management | Hagerty Consulting, Inc.

- » Lead Hagerty team that supports the State of Maryland's \$3.7 billion Coronavirus State Fiscal Recovery Funds allocation. Responsible for ARPA policy advisory, US Treasury and Uniform Guidance compliance, federal and internal reporting, and technical assistance to Department of Budget and Management (DBM) and state agencies.
- » Conceptualized and oversaw the design and administration of the State of Maryland's Non-Entitlement Units (NEUs) of Government Technical Assistance Program, which supports 145 NEUs in the administration of \$500 million in Coronavirus Local Fiscal Recovery Funds (CLFRF).

Project Advisor | New York City Office of Management and Budget, American Rescue Plan Act Support and Advisory Services | Hagerty Consulting, Inc.

- » Provided direction and guidance to Hagerty team that supports New York City Office (NYC) of Management and Budget (OMB) in organizational design/implementation, compliance with US Treasury program guidance and Uniform Guidance, and Federal reporting associated with their \$5.9 billion CLFRF.
- » Advised the City and Hagerty team on the development and implementation of a new, internal stimulus unit focused on CLFRF.

John H. Hageman

Municipal Finance Advisor



Program Manager | Nassau County, New York, Office of Emergency Management, American Rescue Plan Act Implementation Program Management | Hagerty Consulting, Inc.

- » Oversaw Hagerty team that supports the administration of a portion of their \$385 million CLFRF. Provided subject matter expertise on program administration and internal controls.

Senior Subject Matter Expert | Nueces County, Texas, American Rescue Plan Act Support | Hagerty Consulting, Inc.

- » Provided subject matter expertise to Hagerty team that supports Nueces County's strategic planning and community engagement efforts associated with its \$73 million CLFRF.

Subject Matter Expert | Pinellas County, Florida, American Rescue Plan Act Recovery Support | Hagerty Consulting, Inc.

- » Provided subject matter expertise to the county in their planning efforts associated with its \$189 million CLFRF.

Recovery Consultant | City of Santa Rosa, California, American Rescue Plan Act Funding Support | Hagerty Consulting, Inc.

- » Provided initial planning, policy guidance, compliance, and coordination support on the use of ARPA funding received through the city's \$35 million allocation.

Advisor and Consultant | Hageman Consulting

- » Worked with the US congressionally created Financial Oversight and Management Board for Puerto Rico (FOMB) to assess the Commonwealth of Puerto Rico's financial organization, laws, policies, technology, and human capital during the largest municipal bankruptcy in US history.
- » Developed and recommended key initiatives, strategies, and implementation plans focused on strengthening the commonwealth's fiscal management operations.
- » Advised the incoming City of Detroit Chief Financial Officer (CFO) as part of the transition between incoming and outgoing CFOs.
- » Partnered with the incoming CFO for the City of Detroit. Led and performed fiscal management improvements, organizational analyses, and executive coaching for C-suite finance executives.
- » Led and facilitated a review of the city's Fiscal Year (FY) 20 budget development process and recommended improvements.
- » Assessed debt management functions and recommended new organizational model, workstreams, and staffing.

Chief of Staff | City of Detroit, Michigan, Office of the Chief Financial Officer

- » Led day-to-day operations of the Office of the Chief Financial Officer (OCFO), the city's cross-functional financial organization with 470+ full time employees (FTEs) and a \$56 million budget.
- » Created and managed the CFO's Office, including staff covering strategic planning, fiscal management reform, performance management, human capital, and messaging/communications.
- » Directed, managed and/or executed top-priority fiscal management reform initiatives. Examples include: (1) implemented a restructuring of all finance functions citywide, (2) designed/operationalized a new Forecasting and Economic Analysis Division, (3) created all new financial/budget policies and drafted changes to City legislation, and (4) performed quality control and oversight on Oracle Cloud Enterprise Resource Planning (ERP) implementation.

John H. Hageman

Municipal Finance Advisor



- » Advised on and participated in bond offerings, including the city's first General Obligation tax-exempt bond offering (\$135 million) on its own credit in decades. Focused on telling Detroit's turnaround story and messaging/communications with rating agencies, investors, media, and the general public.
- » Worked to create a plan to address higher than expected legacy pension obligations, including establishing an irrevocable IRS Section 115 Trust to accumulate funds to partially offset pension contributions resuming in FY 24.

Business Analyst | Public Consulting Group

- » Served as the Special Assistant to City of Detroit CFO John W. Hill during the city's bankruptcy, helping to develop and implement Detroit's financial recovery and reform strategy. Performed high-priority and/or politically sensitive projects, including the creation of a new governance/administrative system for the Finance Department, and coordinated with the city's executive leadership on their needs/requests from the Obama-Biden Administration.
- » Assessed the City of Detroit's grants management and planned/executed its successful turnaround. Work resulted in Detroit bringing in over \$1 billion in grant revenue since bankruptcy and reducing its questioned costs on federal funds to \$0 from upwards of \$18 million.
- » Built and implemented new city agencies for grants management and development, established new local laws, policies, and procedures, implemented a new grants information technology (IT) system, and led hiring/training of inaugural city staff.
- » Re-wrote local procurement laws and advised consulting team on procurement reform initiative, which included implementing the city's first IT procurement system, redesigning all procurement processes, and training city staff.

Volunteer Coordinator | AmeriCorps VISTA, Hearts and Hands of Indiana

- » Designed and implemented a volunteer outreach strategy for home construction and counseling services in a moderate-low-income neighborhood on Indianapolis' westside.

Employment History

Hagerty Consulting, Senior Manager, 2021 to Present

Hageman Consulting, Independent Consultant, 2019 to 2021

City of Detroit, Michigan Government, Chief of Staff, Office of the Chief Financial Officer (OCFO), 2015 to 2019

Public Consulting Group, Business Analyst, 2013 to 2015

AmeriCorps VISTA, Hearts & Hands of Indiana, Volunteer Coordinator, 2012 to 2013

Obama For America, Deputy Field Organizer, 2012

Indiana University, School of Public Health, Research Assistant, 2012

Town of Fort Myers Beach Florida

Disaster Recovery Consultant Services

RFP-23-01-AD

November 3, 2022



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November 3, 2022

Town of Fort Myers Beach
2525 Estero Boulevard
Fort Myers Beach, FL 33931

Attn: Amy Baker, Town Clerk

Subject: Response to RFP-23-01-AD, Disaster Recovery Consultant Services

Dear Ms. Baker:

Atkins has provided disaster recovery services in Florida for nearly 30 years through the FEMA Public Assistance (PA) and Hazard Mitigation Assistance (HMA) programs. Our team is highly adept in providing complex policy advice and guidance in the development, review, implementation, and closeout of projects.

The Town of Fort Myers Beach (Town) will need a strong, ready-to-deliver team that brings a Florida focus, insight, and responsiveness to assist on this contract. As highlighted within our proposal, Atkins is intimately familiar with federal grant compliance and has direct experience working with the Florida Division of Emergency Management (FDEM) since 2018.

In addition to our national expertise, we have worked with a community facing very similar difficulties following a major storm, the City of Mexico Beach, Florida. As a prime contractor with Mexico Beach, we have worked across housing, emergency operations, FEMA PA, mitigation, and resiliency to help the City recover more than \$100M, all of which was 100% reimbursable. We will put those best practices in use in working with the Town in response to Hurricane Ian and provide:

Local focus. Atkins has 13 hub offices in Florida, including Fort Myers.

Insight. Our team has a proven track record locally in Florida, statewide through direct contracts with the FDEM, and nationally with FEMA for nearly 30 years.

Responsiveness. Our team has mobilized for large-scale, federal operations and small communities leveraging our experience managing more than 50,000 projects and \$50 billion in federal funding.

As an Atkins Vice President, I affirm that I am authorized to commit and sign on behalf of Atkins. I will also serve as the point of contact and can be reached on my cell phone at 813.765.5973, by office direct dial at 813.281.8367, or by email to charlotte.maddox@atkinsglobal.com. We respectfully request your consideration and are confident we have the experience to help the Town at this critical time.

Sincerely,



Charlotte Maddox, PE, PMP, CFM, D.WRE, F.NSPE, F.FES
Vice President, Sector Manager

Section 1 – Background, Experience, and Qualifications

1.1 Company Background

Established in Florida in 1960, Atkins North America, Inc. (Atkins) is one of the most respected design, engineering, and project management consultants with offices across the United States and globally. We are an industry leader in providing emergency management services, including the development and administration of Federal Emergency Management Agency (FEMA) Public Assistance (PA) and Hazard Mitigation Assistance (HMA) projects.

Atkins has been a part of the fabric and culture of the Sunshine State for the past six decades and has proudly supported some of the most challenging infrastructure projects, in addition to helping Floridians recover from multiple disasters through support to the Florida Division of Emergency Management (FDEM).

Effective July 3, 2017, SNC-Lavalin purchased WS Atkins plc., parent company of the Atkins North America Holdings Corporation. Atkins North America, Inc., remains a wholly owned subsidiary of The Atkins North America Holdings Corporation.

Atkins has more than 3,300 employees and 70 offices located throughout North America and over 1,000 employees across 19 offices in Florida.

While we have national experts that may work remotely on the project as needed, the location from which work will be completed is our Fort Myers office, which has more than 25 staff members. Our local office is located at:

1514 Broadway, Suite 202
Fort Myers, Florida 33901

Atkins has enjoyed working closely with federal, state, and local agencies on a wide variety of projects. Atkins is very proud of our long history of providing clients with responsive and reliable emergency management, planning, and engineering

services, and this is evident by our 90 percent repeat business. We are especially proud of our long service to emergency management clients like FDEM and communities throughout Florida in their times of need after disasters. As part of this effort to reduce the disaster damage cycle, we have worked extensively in recovery, mitigation, and resiliency.



1.2 Proposed Staff

As one of the world's most respected design, engineering, and project management consultancies, we have a responsibility to help move the world forward, one step at a time.

We care about it; we want it to be a place where everyone is considered and where lives are enriched through the implementation of our ideas. Working with our clients, we believe that the scale of what we can accomplish together is greater than anyone can imagine. This is our time to make a difference and protect the world in which we live and prosper.

The Atkins team combines the specialized talents of a Florida-based team, combined with national experts, each with 20 years of FEMA experience. Bios for the Atkins team follow, and our team's organization is shown on **Figure 1**.

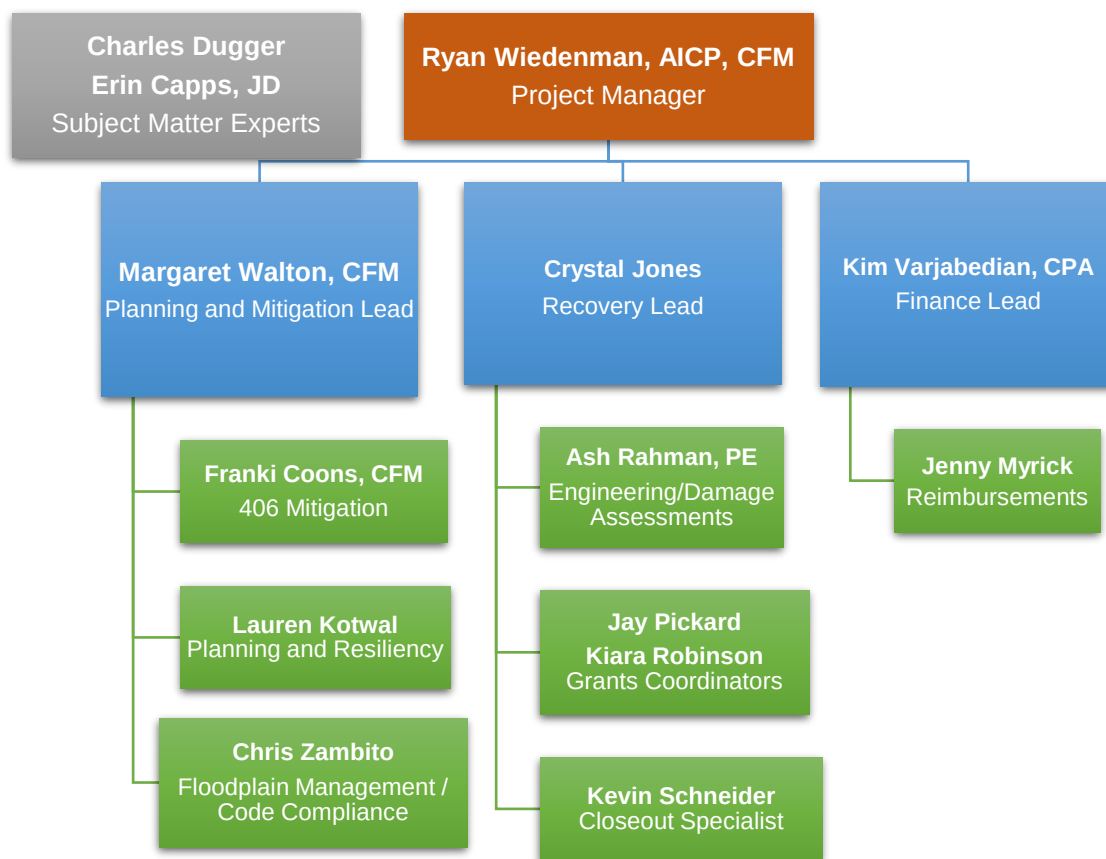


Figure 1. Project Organization

Our robust team represents expertise in all areas of recovery, mitigation, and planning. While we have presented a broad range of capabilities, **team members will only be assigned as requested or required by the Town.**

Additionally, while we have included personnel specifically to address each area of the scope of work, **all team members have in-depth experience working across all programmatic areas.**



Erin Capps, JD
Subject Matter Expert

Erin Capps is a licensed attorney specializing in FEMA and HUD compliance to maximize funding for communities while minimizing risk. As a planner, project manager, grant manager, and subject matter expert, Ms. Capps leverages over 18 years of experience in providing programmatic oversight and working with state and federal agencies in the implementation of mitigation, recovery, and resiliency programs. She has worked with communities throughout Florida, including the City of Mexico Beach.



Charles Dugger
Subject Matter Expert

Charles Dugger has 21 years of experience as an emergency management specialist working with local, state, and federal governments and the private sector. During his deployments to more than 50 declared disaster sites nationwide, Mr. Dugger has managed as many as 70 emergency staff and approved millions of dollars in federal grants per deployment.

His well-rounded experience includes serving as a PA specialist, closeout specialist, training program developer, facilitator, insurance/technical lead, appeal analyst, planner, and Incident Management Assistance Team infrastructure lead. He has experience across all PA categories, including oversight and advice from debris & emergency protective measures and all infrastructure FEMA Categories (A-G), to providing assistance directly to subgrantees through work with FEMA Region IV & VIII. Mr. Dugger also provides part-time support to FDEM under a subcontract for technical assistance related to Hurricanes Irma and Michael and COVID-19.



Ryan Wiedenman, AICP, CFM
Project Manager

Ryan Wiedenman is a senior planner and project manager with more than 10 years of experience in risk assessment, hazard mitigation, plan development, and community engagement. Since joining Atkins, he has worked primarily with state and local governments on mitigation, recovery, and resilience projects aimed at reducing overall risk in communities. Mr. Wiedenman also led a number of tasks for the Federal Emergency Management Agency and Department of Housing and Urban Development, including RiskMAP outreach, substantial damage estimation, and CDBG-DR program support. Additionally, he has helped as a project manager to Mexico Beach, Florida in the receipt and reimbursement of more than \$100M in response to Hurricane Michael.



Margaret Walton, CFM
Planning and Mitigation Lead

Margaret Walton has 15 years of experience in emergency management including a wealth of experience in disaster relief management and coordination. She is experienced in project management, stakeholder involvement, and the organization of coordination and

collaboration between agencies as related to planning. Ms. Walton has led several planning projects to include hazard mitigation planning and recovery planning for municipalities, states, and universities. She has assisted in grant and plan development in the areas of Continuity of Operations Plan planning, recovery planning, emergency communications planning, and training and exercise design for various projects. Ms. Walton has managed disaster grants programs in relation to individual assistance and recovery.



Crystal Jones
Recovery Lead

Crystal Jones has 9 years of experience working with local, state, and federal governments, tribal nations, and the private sector in disaster preparedness, response, recovery, and hazard mitigation planning, program management, reviewing/submitting request for information and operations. She also has extensive experience with FEMA Public Assistance grant management, reviewing applications, project development and management, reviewing for duplication of benefits, appeals review, time extension reviews, reimbursement requests and reviews, and quarterly reports. She has worked in logistics in the State EOC through three major disasters.



Kim Varjabedian, CPA
Finance Lead

Kim Varjabedian has 31 years of experience. She has extensive experience in leading strategic planning and analysis teams, digital and customer marketing strategy analysis, operational efficiencies, and business development. Ms. Varjabedian has provided direct support to the Florida Division of Emergency Management (FDEM) in the administration of the FEMA PA program. She provides high level financial analysis and establishes controls for cost tracking and reimbursement.



Jenny Myrick
Reimbursements

Jenny Myrick has 19 years of experience, including experience with FEMA PA project development, management, compliance, and policy support. As a lead for cost reimbursement, she is adept in all areas of cost tracking for FEMA projects. Ms. Myrick has experience working in management roles, managing as many as 75 employees. She has an extensive background in financial processes, including accounts payable, accounts receivable, payroll, monthly sales tax, bank reconciliations, and quarterly tax preparation. Ms. Myrick has also prepared departmental budgets, maintained cash flows using budget analysis software, and worked directly with auditors to complete annual audits.



Ash Rahman, PE
Engineering/Damage Assessments

Ash Rahman is adept at creating tools and technology through GIS. He has worked on the development of risk and vulnerability assessments for mitigation plans and updates. Additionally, his background includes more than 3 years of water resource engineering experience, specializing in hydrology and hydraulics with a focus on floodplain modeling and construction management. In working with the City of Houston, Mr. Rahman has helped to verify damages and review code compliance for damages to the City's wastewater facilities in response to Hurricane Harvey.



Kiara Robinson
Grants Coordinator

Kiara Robinson offers extensive experience providing monitoring and compliance for FEMA PA and HUD Community Development Block Grant – Disaster Recovery (CDBG-DR) projects. Ms. Robinson began her career in disaster recovery by managing the Non-Profit Rebuilding Pilot Program in response to Hurricane Katrina; this project involved more than 150 projects. She has since assisted local and state governments in all phases of recovery, from PW development to reconciliation for reimbursement and project closeout. Adept at interpreting rules and regulations and reviewing projects, procurements, and contracts for compliance with 2 CFR, she has particular expertise in Category B PW development and review. Ms. Robinson is also familiar with the new FEMA delivery model and with implementation of provisions and opportunities for communities under the Disaster Recovery Reform Act.



Felix Merced Cruz
Grants Coordinator

Felix Roman Merced Cruz has more than 15 years of experience in many facets of the project management and construction industry, including disaster management experience in support of FEMA, the New Jersey Office of Emergency Management, and other public agencies. He has experience with multimillion-dollar projects through coordinating trades, developing partnership, and building positive rapport with architects, engineers, local officials, vendors, clients while maintaining costs. Mr. Cruz is versed in contract negotiations, project estimating, impending design challenges, document preparation, building codes and regulations, material purchasing, and site management through certification of occupancy.



Kevin Schneider
Closeout Specialist

Kevin Schneider has 31 years of emergency management, disaster recovery, and health and safety experience. For the last 15 years, he has provided emergency disaster response and recovery services to the most devastating natural disasters in North America including Hurricanes Michael, Irma, Maria, Irene, Katrina, Charley, Frances, and Jeanne, as well as Ice Storm Pax. Additionally, Mr. Schneider has provided PA technical assistance at all levels of government, including assistance on a subcontract to FDEM for validation, review, and closeout of projects after Hurricane Irma.



Franki Coons, CFM
406 Hazard Mitigation

Franki Coons has 38 years of extensive experience managing and integrating diverse disaster recovery-related programs. Prior to joining Atkins, Ms. Coons spent 20 years with FEMA where, after multiple progressive promotions, she served in the position of Chief of the Grants Implementation Branch at HQ. She is skilled at interpreting program requirements related to duplication of benefits, managing match and cost shares, leveraging programs, and managing contracts. Ms. Coons is familiar with the unique opportunities and challenges associated with coordinating multiple programs during large, complex recoveries such as Hurricanes Katrina and Rita, and Superstorm Sandy. She has an established reputation for working cooperatively, is experienced articulating program requirements to varied audiences.



Lauren Kotwal
Planning and Resiliency

Lauren Kotwal is an environmental and land use planner with 10 years of experience in the development and delivery of mitigation programs. She has extensive experience conducting environmental reviews of infrastructure, disaster recovery, mixed-use, and residential projects. Additionally, Ms. Kotwal has two years of project management experience administering Community Development Block Grants (CDBG) and has assisted with the creation of databases for HMA grant tracking.



Chris Zambito, CFM
Floodplain Management and Code Compliance

Chris Zambito, CFM, has 24 years of hazard mitigation and emergency management experience including projects requiring risk communication and public involvement activities. His responsibilities have included working with stakeholders to design public outreach strategies, developing presentations with an emphasis on simplification of technical jargon, and facilitating or presenting at public events. Mr. Zambito assisted with Pinellas County Local Mitigation Strategy project.

While staff will be assigned to the project based on the need or request from the Town, all team members proposed are available to start immediately. Project roles, responsibilities, and labor categories are shown in **Table 1** below.

Table 1. Staff Roles and Responsibilities

Name	Role	Labor Category	Responsibilities
Erin Capps, JD	Subject Matter Expert	Subject Matter Expert	Programmatic and policy advice; project implementation; contract/procurement compliance; training.
Charles Dugger	Subject Matter Expert	Subject Matter Expert	Programmatic and policy advice; project implementation; FEMA Grants Portal Project formulation; cost estimates; eligibility; appeals; housing; training and infrastructure rebuilds after catastrophic damages.
Ryan Wiedenman, AICP, CFM	Project Manager	Project Manager	Project oversight; liaison to FDEM and FEMA; strategy implementation; identifying funding opportunities; training; meetings, reporting, and QA/QC.
Crystal Jones	Recovery Lead	Senior Specialist	Grant identification and application; project formulation; project tracking; oversight and review; FEMA grants portal.
Kim Varjabedian, CPA	Finance Lead	Senior Specialist	Financial oversight and management; establish systems for cost reimbursements.
Margaret Walton, CFM	Planning and Mitigation Lead	Senior Specialist	Development of recovery, reconstruction, or mitigation plans; oversight of HMA grants.
Franki Coons	406 Hazard Mitigation	Planner/Engineer III	FEMA Hazard Mitigation Grant Program (HMGP) development; 406 HM; environmental/historical preservation; training.
Chris Zambito, CFM	Floodplain Management / Code Compliance	Planner/Engineer III	Floodplain management, including Substantial Damage Estimates (SDE); review/update flood ordinances; code compliance review; training
Lauren Kotwal	Planning and Resiliency	Planner/Engineer II	Mitigation planning and grant development.
Ash Rahman, PE	Engineering/Damage Assessments	Planner/Engineer I	Engineering review; construction management oversight; damage assessments.
Felix Cruz	Grants Coordinator	Technical Specialist	Project development; grant review and management; coordination with FDEM; compliance; cost tracking.
Kiara Robinson	Grants Coordinator	Technical Specialist	Project development; grant review and management; coordination with FDEM; compliance; cost tracking.
Kevin Schneider	Closeout	Technical Specialist	Closeout process; appeals; cost reimbursement.
Jenny Myrick	Reimbursements	Technical Specialist	Review of reimbursement requests; cost tracking; financial compliance; appeals.

1.3 Experience

Atkins has provided disaster response and recovery support to Florida following every major storm since Hurricane Andrew. We are currently supporting FDEM as a prime contractor in the management of the COVID-19 response and state agency support for all disasters.

A key to Atkins' success has been our emphasis on strong project management designed to meet client needs through responsive performance and delivery of quality service and products. Our in-depth understanding of business, environmental, technical, and political factors enable us to move projects forward rapidly and efficiently.

We offer full recovery support from development to closeout and can access subject matter experts from finance to legal compliance to highly technical engineering as needed. Since 1992, we have provided the following services for recovery:

- Conducting project development.
- Performing technical assistance and training.
- Contract and procurement compliance in accordance with 2 CFR 200.
- Project implementation.
- Processing Requests for Information (RFI) and Requests for Reimbursement (RFR).
- Using FloridaPA and FEMA Grants Portal to track project status and expedite reimbursements.
- Processing appeals
- Responding to appeals.
- Conducting correspondence and acting as representative/facilitating meetings with FDEM/FEMA.
- Expediting and maximizing funding opportunities across FEMA, HUD, DOT, and State grants.
- Providing housing support to include sheltering, Substantial Damage Estimates (SDE), and inspections.
- Providing programmatic and policy advice.
- Conducting small and large closeout.

Atkins' comprehensive knowledge of emergency operations and recovery greatly assists our clients as we have worked at all levels of government in the management of disasters. **Figure 2** illustrates our expansive work with local and state clients.

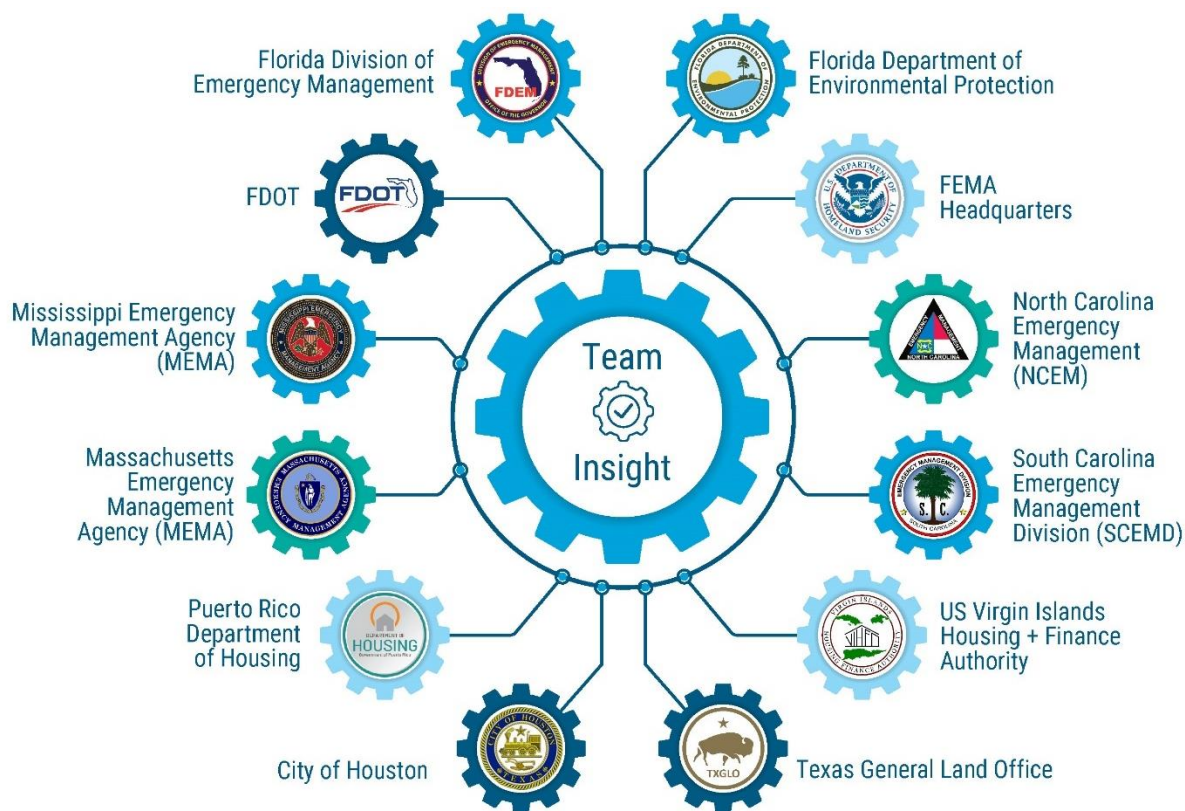


Figure 2. Key Recovery and Mitigation Clients

Our extensive state and local emergency management experience allows us to recognize our clients' needs and provide them with comprehensive pre-disaster planning and post-disaster response and recovery services. **Figure 3** illustrates our breadth of experience across multiple state and federal grant programs.

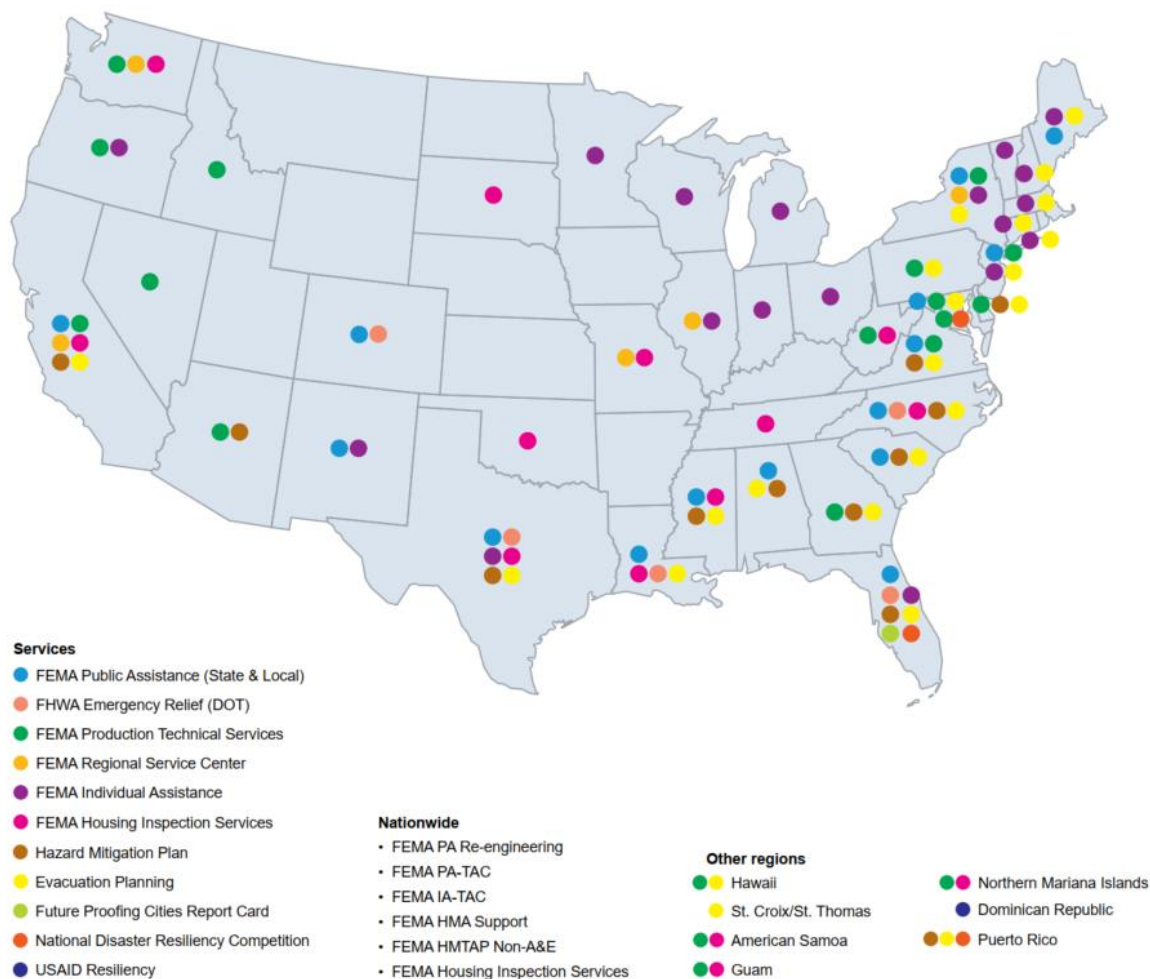


Figure 3. Location/Type of Recovery Services

In the wake of some of the nation's worst natural disasters, many government agencies have relied on Atkins to assist with recovery efforts and to develop strategies for minimizing the effects of future hazard events. Atkins has a dedicated emergency management group composed of disaster planners, engineers, policy specialists, geographers, and scientists who focus entirely on providing disaster preparedness, response, recovery, and mitigation services.

We have collectively overseen more than 50,000 grant projects, have managed more than \$50 billion in funding, including more than \$1 billion in closeout.



A sampling of our recovery and mitigation projects over the last 5 years is shown in [Table 2](#).

Table 2. Recovery and Mitigation Sample Projects

Client	Role/Description	Period of Performance
City of Mexico Beach, FL	Prime contractor providing comprehensive FEMA PA, HMA, and HUD CDBG-DR and MIT grant management services following Hurricane Michael. Additionally, Atkins developed a Resiliency and Recovery Plan utilizing funding from FDEP & total infrastructure rebuilds utilizing FEMA and other funding sources for a more resilient city.	2018-2023
FDEM State Agency	Prime contractor providing all hazard FEMA PA grant management services.	2022-2024
FDEM COVID-19 PA	Prime contractor providing FEMA PA consulting services in response to the COVID-19 Pandemic.	2020-2024
FDEM Hurricane Irma/Michael	Subcontractor responsible for technical assistance, including processing and reviewing projects, RFIs, RFRs, and conducting closeout.	2018-2021
City of Miami, Florida, American Rescue Plan Act (ARPA) Consulting	Prime contractor providing management of ARPA State and Local Fiscal Recovery Funds (SLFRF) responsible for management and compliance of infrastructure projects.	2021-2024
State of New York, COVID-19 Public Assistance Management	Provided FEMA PA consulting services, to include review of verification and expenses, documentation, and reconciliation between FEMA and CARES Act funding	2021–2022
City of Houston, TX, Disaster Recovery Services	Prime contractor under a staff augmentation contract performing comprehensive FEMA disaster recovery and hazard mitigation support for legacy disasters, including Hurricane Harvey, and future disasters.	2022-2025
Massachusetts Emergency Management Hazard Mitigation Assistance Management	Atkins provides HMA grant management expertise on behalf of MEMA, to include detailed projects reviews across all programs: HMGP, Flood Mitigation Assistance (FMA), PDM, and Building Resilient Infrastructure and Communities (BRIC)	2020–2024
California Office of Emergency Services	Subcontractor providing support services for a range of disaster recovery and mitigation tasks, technical assistance, and training	2018–present
Montgomery County, TX	As a subcontractor, provides response and recovery services including substantial damage estimates and debris monitoring, with staff on the ground within 48 hours of activation	2018–present
Maine Emergency Management Agency Emergency Management and Planning Services	Subcontractor PA project assistance including training, technical assistance, and closeout	2018–2023
Puerto Rico Sheltering and Temporary Essential Power (STEP) and CDBG-DR Programs Management	Building on the success of the island-wide STEP program (temporary housing repairs), Atkins helped manage grants through the implementation of the CDBG-DR program	2018–2019
Virginia Division of Emergency Management	Statewide PA consulting to include small project closeout and training	2017–present

1.4 Past Performances

Our firm is uniquely qualified to help the Town of Fort Myers Beach with project development and management and maximizing recovery. There are many similarities to the City of Mexico Beach following Hurricane Michael where we have helped to recover more than \$100 million. We have worked with the City, FDEM, and FEMA in maximizing funding. **All costs and services have been 100% reimbursable.**

Hurricane Michael Comprehensive Disaster Recovery

Client: City of Mexico Beach, Florida

Description: Atkins professionals have been on the ground supporting City of Mexico Beach recovery efforts since Hurricane Michael made landfall. We assist the City with overall recovery efforts by providing disaster assessment assistance, training, project formulation, professional cost estimating (including 428 project formulation), policy and compliance reviews, and daily communication with both FEMA and FDEM to support each agency with project reviews for approval, obligation, and reimbursement.

Our team manages relationships with all City stakeholders, including Bay County, FDEM, FEMA, and HUD, to maximize recovery efforts. Our team was successful in pushing the first Hurricane Michael project through for obligation and continues to provide grant management support across state and federal resources, including those from FEMA, Natural Resources Conservation Service (NRCS), and FDEP as well as donated resources. Our work to streamline responsiveness has resulted in nearly all projects being obligated. From accounts from FEMA Region IV, despite the size of the City, and



due to the efforts of the team, Mexico Beach is farther along in their recovery than other communities impacted by Michael. Further, through the work of our team and with assistance from FDEM, **the first large project obligated Project Application for Hurricane Michael was for Mexico Beach.** Mexico Beach is one of the only communities impacted by Hurricane Michael that did not use loans as part of their recovery efforts despite being ground zero with catastrophic damages. Atkins supported and coordinated the City's substantial damage estimate (SDEs)/50% rule appeals using Atkins experience providing SDEs via FEMA

software/inspection processes. Due to our knowledge of FEMA policies and procedures and The City of Mexico Beach vision of rebuilding quickly and also more resilient has resulted in a new and stronger coastal construction from sand dunes, parks, marinas, jetties, fire/police station approved rebuild and relocated designs to include a new City Hall.

Period of Performance: 2018–2023

Point of Contact: Doug Baber, City Administrator, 850.648.5700, ext. 3,
d.baber@mexicobeachgov.com

COVID-19 Public Assistance Disaster Recovery Grant Management

Client: Florida Division of Emergency Management (FDEM)

Description: Since 2020, Atkins has provided more than \$500 million of public assistance (PA) and grant management services for 150+ applicants in South Florida, who were impacted by COVID-19. This includes Miami-Dade County, City of Miami, Broward County, and Palm Beach County, Florida.

The project involves eligibility determination, initial and final applicant review processes, bookmarking and validating invoices, cost summary validation, drafting cost summary of requests for information (RFI), validation of information report (VIR) development, RFR drafting, creation of project budgeting tools, and organizing FEMA grants portal informational reference documents for Applicants. Atkins' management and finance team adheres to strict documentation and accountability for all work performed. We ensure compliance with contract standards implemented by FDEM. We deliver high level coordination and guidance with the FDEM leadership team on program changes, FEMA engagement and program progress analysis, inclusive of an eligibility matrix to assess consistency of FEMA eligibility determinations.

Period of Performance: 2020-2024

Point of Contact: Kevin Adkison, Public Assistance Officer,
850.570.7073, kevin.adkison@em.myflorida.com

Atkins has consistently delivered projects successfully, on time, and on budget, and with the utmost respect for our clients' goals.

Statewide Comprehensive Disaster Recovery Services

Client: South Carolina Emergency Management Division (SCEMD)

Description: Atkins has supported back-to-back declared disasters in South Carolina, including the 2014 winter storms, 2015 Hurricane Joaquin, 2016 Hurricane Matthew, 2016 Pinnacle Mountain Fire, 2018 Hurricane Florence, and most recently, COVID-19.

Atkins has played an integral role in the support of more than 1,200 projects, totaling an estimated \$250 million, throughout South Carolina. Atkins attended site visits, wrote and reviewed PWs, evaluated eligibility, discussed potential opportunities for Section 406 hazard mitigation, and served as a liaison between FEMA and various applicants. We also coordinated with the Natural Resources Conservation Service regarding waterway debris removal for a grant totaling more than \$3 million.

For the Town of Nichols, Atkins leveraged funding sources from a variety of state and federal programs, including a Community Disaster Loan application. In 2016, **Atkins received the Coin of Excellence award from Lexington County** for our work to expedite recovery and maximize reimbursements.

Period of Performance: 2014-2022

Point of Contact: Emily Bentley, Chief of Recovery and Mitigation, 803.737.8500,
ebently@emd.sc.gov



Section 2 – Approach to Scope of Work

While disasters can be unpredictable, our approach is consistent and proven, based on an extensive history in providing PA and federal program management and technical advisory services for nearly 30 years.

Following the mobilization of our team, our first objective will be to establish and prioritize internal program management guidance following the State Administrative Plan for the disaster and designate Mr. Wiedenman, as project manager, a point of contact with the Town.

We will prioritize the most urgent needs and establish a liaison within our team for each department to fully evaluate the overall impact and extent of damage. We will also establish a communication plan for coordinating with the debris removal and management contractors in response to Hurricane Ian.

The Atkins team believes in open communication with the Town and its departments not only foster communication but ensure a successful program management and closeout. We are committed to providing the requisite knowledge across all areas of recovery for the entire disaster life cycle as shown in **Figure 4**.

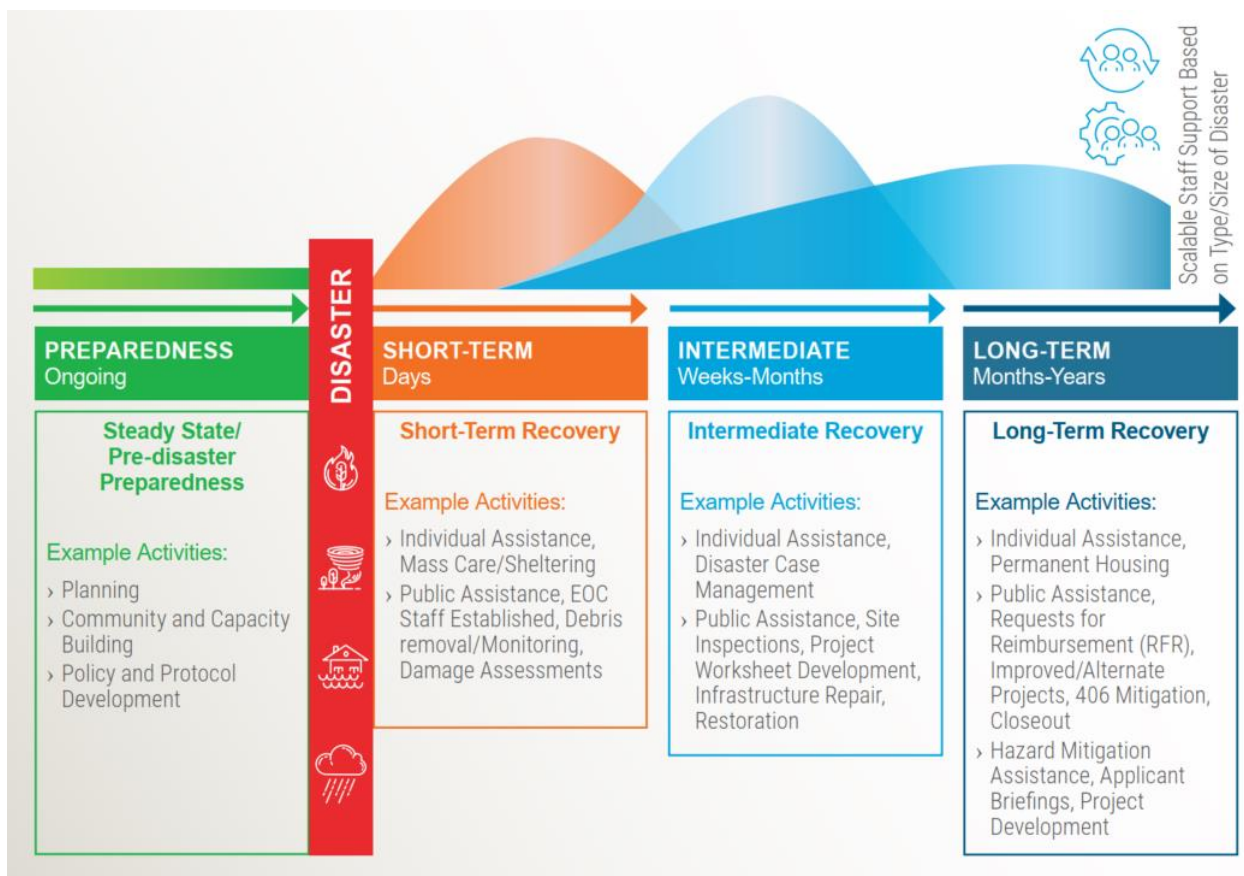


Figure 4. Disaster Recovery Life Cycle

2.1 Housing/Emergency Response Support

Given the timeline and recency of Hurricane Ian, assistance may be needed for any emergency operations and logistics support. We will first make an assessment by working with the Town to determine if our expertise may be utilized in:

- Assisting at the County EOC
- Processing/tracking voluntary resources
- Conducting correspondence or meetings with Town Departments
- Coordinating with FDEM/FEMA
- Providing housing inspection or other services

We have overseen more than \$400 million in FEMA housing, feeding, and response mobilization missions and can provide support across needs as shown in **Figure 5**.



Figure 5. Housing/Response Process

2.2 Project Development

While assessments have occurred, there will be reviews and opportunities to assist with Preliminary Damage Assessments (PDA). Our team has provided PDA assistance at the federal level and has a team ready to mobilize to assist in this coordination. We have seen firsthand the need for accurate assessments at the beginning to prevent future time spent in closeout and appeal.

Our recommendation is to have as accurate a reflection and documentation of the pre-disaster condition of the asset. Scopes of work can be developed for not only repair to facilities but improvements upon the current condition utilizing Stafford Act 406 Hazard Mitigation. To fully maximize funding, it is important to have experts in the field recording data clearly and accurately. Our team has not only assisted in PDAs but also in asset inventory and condition assessment to help better compare original capacity to current condition.



Project manager Ryan Wiedenman provides an update on recovery in Mexico Beach to FEMA Administrator Deanne Criswell.

The Atkins team will prepare projects in a format that will transfer to the FEMA Grants Portal system. Our professionals have prepared DDD, scopes of work incorporating consensus-based codes, Section 406 HMPs, Section 428 cost estimates, and cost estimates using FEMA's recognized cost estimating standards. The Atkins team, **led by project manager Ryan Wiedenman**, has developed and reviewed projects on behalf of local communities and states across the southeast. Mr. Wiedenman works closely with several key staff on our team including subject matter expert Charles Dugger, who has reviewed projects on behalf of FEMA Regions IV, VI, and VIII, brings more than 20 years of experience in all facets of disaster recovery.

Understanding the importance of accurate project development and tracking, we will leverage the experience of our senior leadership team, subject matter experts to support comprehensive PW preparation, from DDD development to cost and scope creation and tracking. The Atkins team will work with the Town on both small and large FEMA PWs,

Categories A-G, and to support local officials with Cat Z (project management cost) submittal and tracking and any other major questions or issues. Our team will work with all Town officials to perform damage inspections and gather the necessary information for large and small PW preparation. Captured data will include digital photos and GPS coordinates with each PW as required.

2.3 Identifying Grants/Maximizing Funding

Atkins is committed to providing continuous service at each phase of response, recovery, and mitigation throughout steady state operations, following the emergency response, and for short- and long-term recovery. We anticipate the greatest need for staff during the emergency response period or immediately following a disaster but will continue to vet and maintain appropriate staff through each phase of recovery through closeout and reconciliation for all program areas.

Our goal is to maximize funding while preventing a de-obligation for the Town. In all contracts where federal funding is received, we develop a client-prioritization matrix of projects and grants. This allows us to explore additional options for funding if we need to assist in meeting local match or in identifying additional resources or grants. For example, in Mexico Beach, we applied for and received grant funds through the Florida Department of Environmental Protection (FDEP) for the creation of a resilient recovery plan for the City. This resulted in allowing more time to invest in prioritizing projects and preliminary design for feasibility. Additionally, we identified and received NRCS, HMGP, and FEMA's Community Loan funding, (which was provided via a grant), to supplement FEMA Public Assistance funding.

We understand the full life cycle of the recovery grant and funding process as illustrated in **Figure 6**, which allows us to focus on immediate needs, infrastructure rebuild, and long-term recovery processes.



Figure 6. Grant Lifecycle

2.4 Hazard Mitigation (Section 404 and 406)

The Atkins team includes national experts known for the development of Section 406 Hazard Mitigation (HM) including developing guidance for FEMA for the creation of BCAs. Our team identifies Section 406 mitigation opportunities from the outset of project development. By prioritizing funding sources and utilizing Section 406 HM opportunities, we will be able to maximize additional funding sources for the Town, including Section 404 HM funds and HUD funding through the CDBG-DR and CDBG-MIT programs.

As part of the STARR II Joint Venture (JV), and through a task order under the FEMA Risk MAP contract, Atkins worked with the City of Houston (COH) and Harris County Flood Control District (HCFCD) for the review of 1,000 projects and technical support for more than 500 structurally related damage projects. Atkins staff identified eligible mitigation strategies for the development of HMPs. When appropriate and feasible, our staff also obtained copies of submitted bids for similar local work to verify costs and identify regional construction practices that might impact costs. Currently, Atkins provides oversight and program management in the creation of detailed BCAs to support off-site mitigation strategies under our GES contract with the COH and HCFCD for disaster mitigation related to wastewater facilities. The team, including **Erin Capps, JD**, has developed detailed cost and technical guidance for consultant teams in the development of HMPs to consolidate WWTPs in response to Hurricane Harvey. For one of the consolidation packages in response to Hurricane Harvey, the current BCA supports a \$1 billion HMP, based upon our analysis using HAZ-US, H&H modeling, and the DFA model. This BCA supports an increase from the original \$25 million

to \$1 billion for a facility repair project. This illustrates our creative approach to BCA solutions when the client was intent on a project cost well over \$1 billion.

Atkins' experienced engineers and technical specialists have an in-depth understanding of FEMA requirements for local government comprehensive project plan and HMP development, using the cost estimating format. We have provided value-added engineering recommendations for clients to implement emergency stabilization strategies, pending longer term design plans. We will provide the Town with historically successful strategies to address infrastructure damage by developing methods and costs for temporary stabilization measures in the near-term and by developing a comprehensive Section 406 mitigation solution for the long term.

For example, in 2017 Atkins developed and presented "Section 406 HM Best Practices" of the SCEMD to a recovery workshop for local South Carolina officials to provide guidance for the development of long-term strategies. This guidance document was later used by the state and local officials in the request for Section 406 mitigation at the onset of damage from Hurricanes Florence in 2018 and Dorian in 2019.

We are currently working with FEMA and the City of Mexico Beach in the rebuilding and relocation of the Police/Fire station, which will be a community safe room for first responders. The station was completely inundated with Hurricane Michael and needs to be relocated to a less flood-prone area. The Atkins team immediately identified the need for 406 funding and has been working with FDEM and FEMA counterparts for approval. The photos below show the current station after the storm and the conceptual design and relocation.



Fire Station Just After the Storm



Municipal Complex Conceptual Design

City of Mexico Beach, Florida Police/Fire Station and
proposed new location/design utilizing 406 HM funding.

2.5 Improved and Alternate Projects

Depending on the event, local officials may wish to construct alternate or improved projects. Atkins will work with local governments to identify eligibility of these projects, in coordination with FEMA and the State. Team members **Charles Dugger** and **Crystal Jones**, who have extensive experience in the development and implementation of improved and alternate projects, will work with the Town to fully vet the benefits or potential setbacks in proceeding with a capped project. Atkins will

track these projects through completion to verify that deadlines are met, appropriate costs are recorded, and, when necessary, the Town is advised of any cost containment issues.

Atkins team has helped guide communities to prioritize projects as eligible for HMPs or as a capped improved or alternate project in many cases. For example, Atkins provided the City of Flagler Beach, Florida with engineering design plans and cost estimates, to repair their iconic fishing pier to its pre-disaster function and



Did you know?

Atkins obtained critical, expedited funding under the 428 program for Mexico Beach.

capacity, while meeting required hurricane-resistant codes and standards. As part of the 50 percent rule requirements, Atkins also provided design, estimated costs and engineering analysis for the fishing pier replacement. Through the election of an improved and capped project, the Atkins team, led by Charles Dugger, expedited FEMA reviews and obligation and increased the overall project total.

The team will also explore the need or availability, in working with FDEM, for using **Section 428** alternative procedures. The program allows for significant benefits in reducing the time in scope and fee discussion but does not allow for an overrun. We leveraged the program successfully in Mexico Beach to receive funding more rapidly but also are aware of the risks as projects change.

2.6 Environmental and historic preservation

Environmental and historic preservation (EHP) review is a fundamental part of any federal grant application and review. Proper documentation and timely coordination will help move through this review process in a more timely manner. Using an approach that has evolved over many years of providing EHP support at all levels of government, combined with effective techniques developed through successful EHP support to other federal agencies, Atkins will provide expert support to the Town in the review and coordination of applications.

Our understanding of previous projects that have the potential to impact the environmental and cultural resources, coupled with our specialized experience and technical understanding of federal EHP regulations, laws, executive orders, and polices, reduces costs and accelerates schedules. A fundamental consideration of the EHP review process is to conduct the work as efficiently and completely as practicable—with appropriate consultation with Town, State, and FEMA EHP staff as well as other resource agency staff (U.S. Army Corps of Engineers [USACE], U.S. Fish and Wildlife Service [USFWS], state historic preservation offices [SHPO], etc.)—to support the timely submittal of HMA and CDBG grant applications.

We will leverage proven practices, tracking tools, checklists, and 508-compliant document templates to provide efficient documentation of the EHP review to the Town. In addition, our experience and familiarity with region- and state-specific resource requirements will further enable our team to provide quality EHP and technical assistance reviews.



Did you know?

In addition to FEMA and HUD programs, Atkins oversees DOT and NRCS grants to maximize funding.

Our process for EHP includes the following key steps:

- Review for scope and compliance
- Gather data/information

- Assess impacts, including Section 106, NEPA, and EO compliance
- Complete review and recommendation

2.7 Closeout, audits, and appeals

For a streamlined and cost-effective closeout, we begin each project while considering final closeout and audit. We verify milestones and timing to ensure expectations are balanced, bringing a proactive approach from the project start versus establishing at project closeout.

Team members included in this response have worked at the local and state levels to process appeals and audits to move projects to closeout, including the oversight of more than \$50 billion in project costs. Atkins manages each project to track overall progress and construction management to meet established timelines or to process an extension as needed.

Our team also includes legal professionals experienced in reviewing procurement processes for compliance, resolving complex eligibility issues, reviewing final inspections, and preparing first and second appeals. All potential appeals will be routed through our program manager to determine whether an appeal is valid. We will work closely with the Town and FEMA to resolve appeal issues to the fullest extent possible before a formal appeal is prepared and filed. Atkins will assist the Town with grant closure by reviewing each subgrant application for completeness and accuracy and by reviewing the FEMA P-4 form. We will prepare for grant closeout and audit by working in compiling all project files and documentation, scanning all documentation and organizing electronic files, and backing up all documentation.

Once all large projects have been completed for a disaster, all small projects have been appropriately validated, all appeals resolved, and all funds received for each project, Atkins will work hand-in-hand with the Town to prepare for the disaster closure. Our process and recommendations for closeout and auditing include:

- Establishing stabilshing document management protocols and retention policies to include invoices, payroll, equipment logs ,contracts, insurance, procurement, cost comparisons, proof of payment, and other project-related documents.
- Tracking project data including the number and size of projects, grouping by category and location, anticipated completion dates, and timelines and procedures per category of work.
- Estimating and establishing time frames for final inspections.
- Conducting thorough insurance review to document proceeds and verify the policy is paid correctly to protect against a duplication of benefits or potential de-obligation.
- Verifying the funding drawdown schedule aligns with projected completion dates

2.8 Financial Management and Cost tracking

Our team's expertise includes development or review of more than 50,000 projects, work with FEMA to resolve issues and appeals, and preparation of audit-ready documentation of field activities while working across all levels of government in the management of more than \$50 billion in recovery funds. In addition to the management of tasks and allocation of time in our Oracle timekeeping system, which must be updated



Did you know?

Currently Atkins is managing \$137M in fiscal recovery funding for the City of Miami's ARPA Program.

daily and approved weekly, we will utilize internal management tracking systems and custom dashboards such as Power BI to review the critical path, schedule, milestones, and project budgets.

Atkins will capture all costs specific to the project work to include name, position, date, hours, rates, and task description, so that the Cat Z PW submitted to FEMA is fully supported and in FEMA compliance for reimbursement of management costs. **Figure 7**, below, is an example of cost tracking through a Power BI dashboard for just-in-time review of financial data. Atkins can supplement any current Town tracking or dashboard or create separate customized reports based on the needs and desires of the Town to manage burn rate, cash flow (the Town's spend vs. anticipated payments from FEMA), resource allocation per project, and projections.

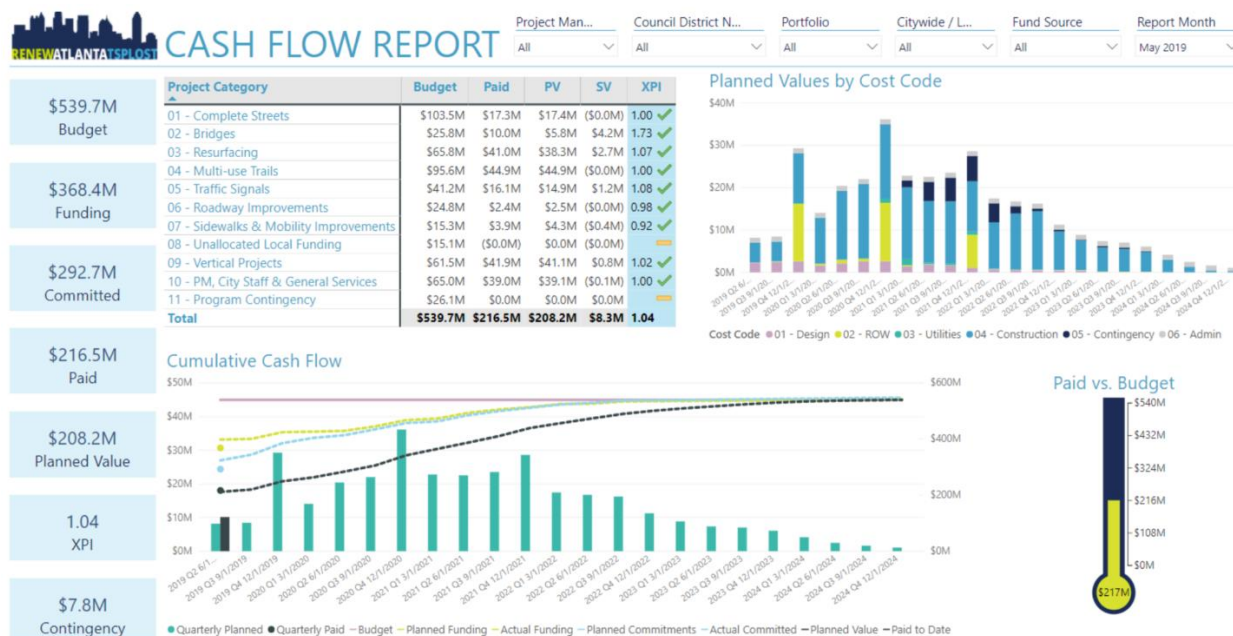


Figure 7. Dashboard/Tracking Example

2.9 Technical assistance and training

The Atkins team, with our deep knowledge, understanding, and practical experience, will develop and implement a comprehensive approach to outreach that meets the Town's needs in developing any unique or off-the-shelf training and technical assistance. Our approach is scalable, both in the number of stakeholders requiring training as well as the training content.

Examples of disaster recovery training developed and conducted by Atkins are shown in the following table:

Table 3. Atkins’ Disaster Recovery Training Examples

FEMA Training Examples	
FEMA Public Assistance (PA) training: FEMA, state, and local agencies	FEMA Train-the-Trainer (TTT): site inspectors, Section 428, FEMA Grants Portal, and FEMA program delivery manager (PDMG) training
Advanced debris management	Field inspections
FEMA Benefit-Cost Analysis (BCA) guidance development and training	CDBG-DR intake and eligibility
Disaster recovery housing case management	HAZUS-MH
Safe room assessments	Floodplain management and floodproofing
406 Hazard Mitigation	FEMA Individual Assistance
Response training	

Our staff have conducted internal and external training of new hires and staff in the implementation of large-scale disaster programs using training courses, webinars, tabletop exercises, and briefs on a wide range of topics and programs at the federal, state, and local levels. This is often coupled with on-the-job training and/or mentoring as our training with the South Carolina Emergency Management Division (SCEMD) lead to training new staff to become future leaders. The team has also delivered mitigation strategy sessions at all levels of government. Atkins provides SME support to a small business-led team that recently won a contract for HMA grants and floodplain management training development and support to FEMA Headquarters.

As part of the Strategic Alliance for Risk Reduction (STARR) and STARR II JVs formed for the Risk MAP Production and Technical Services (PTS) contracts, Atkins continues to provide important risk communication support under the PTS CERC Program where we are the only PTS provider supporting the FEMA-sponsored Technical Mapping Advisory Council (TMAC) effort to quantify multi-stakeholder opinions about the next generation of flood risk products to communicate graduated flood risk (versus the current binary “in or out” of high flood risk areas). We work extensively with FEMA’s Building Science and Dam Safety programs and are at the forefront in providing hazard mitigation planning, grants management, disaster recovery, and wraparound program integration services. Our work with FEMA Headquarters and eight of the ten FEMA Regions provides important technical, “boots on the ground” insights that are foundational for an outreach program. Importantly, this experience will facilitate a collaborative, multi-organizational approach for the Town.

Atkins’ Virtual Public Meeting platform allows our clients to reach out, inform, and interact with the public about their projects. From planning to construction, the Atkins’ Virtual Public Meeting platform can host stakeholder/charette meetings, public information meetings, and public hearings to include the public in the decision-making process or to provide crucial project information.

The Virtual Public Meeting platform, as shown in **Figure 8**, below, is a great choice for project participants who are across a large geographic area, are rural residents, or those participants who have schedule conflicts or are isolating. Atkins is not only experienced in using virtual meeting platforms but has become a resource for clients and other consultants. The Virtual Public Meeting platform is not only easy to use but an excellent choice for accessibility because there is no cost or application for the public to download to use. Atkins' virtual public meetings include capabilities to exhibit large format figures/maps, play explanatory videos, present slideshows, display summary or workflow documents, access detailed PDF documents, link to external project related websites, and initiate live virtual interaction during advertised meeting hours.

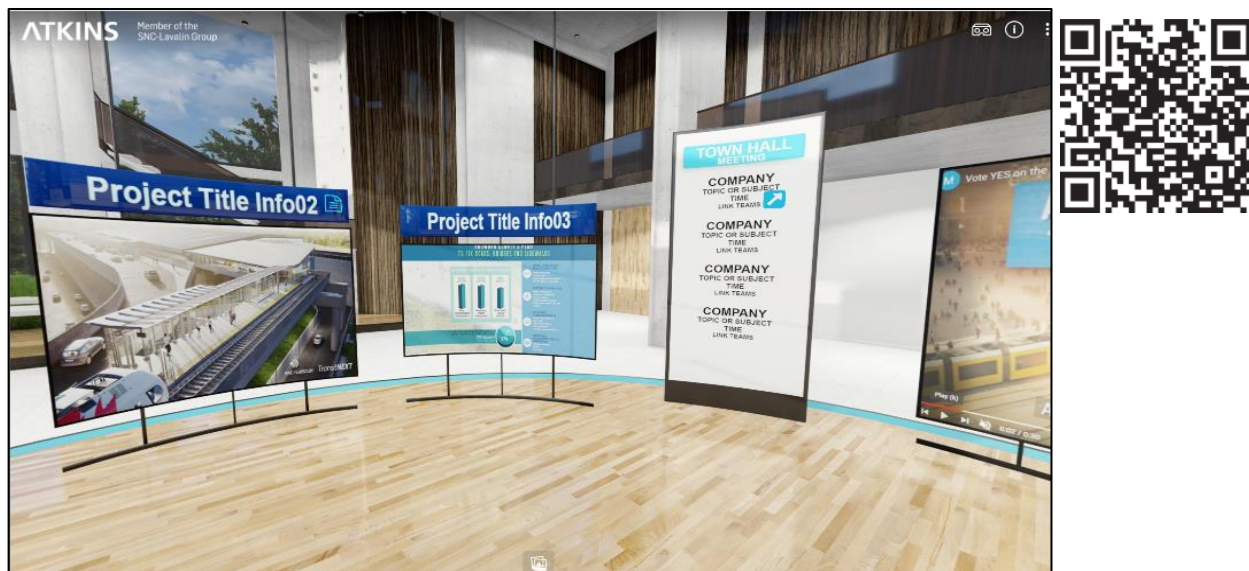


Figure 8. Atkins' Virtual Meeting Room and QR Code

Virtual public hearings or charrette meetings have the option to link to live in-person meetings on a variety of platforms including GoToMeeting, WebEx, Zoom, Microsoft Teams, Facebook Live, and Skype, all of which conform to the public's existing comfort and familiarity with these tools. Each meeting can have a dedicated telephone call in number associated with it so if a citizen does not have internet access they can still join and participate in the meeting. There are functions which include written question and answer, as well as the raise hand feature that allows attendees to be called on to speak. The webinars are recorded, and all written correspondence is saved in a meeting record which may be required for proper documentation. Some live meetings are considered "hybrid" and have viewing locations in the community where citizens can go to participate in the virtual meeting if they do not have internet access.

Section 3 – Management Plan and Understanding of the Project

3.1 Management and Reporting

Atkins has developed and maintained programs for states for HMA and PA development and manages each project to track overall progress and construction management, to confirm timelines are met, or to process an extension as needed.

We will develop and adhere to comprehensive administrative guidelines for the management of:

- Financial management
- Construction management
- Stafford Act compliance
- Procurement compliance

Our team's expertise includes working across all levels of government in the management of more than \$50 billion in recovery funds. In addition to the management of tasks and allocation of time in our Oracle timekeeping system, which must be updated daily and reviewed weekly, we will utilize internal management tracking systems and dashboards such as Power BI to review the critical path, schedule, milestones, and project budgets.

All proposed Atkins team members have experience managing large reimbursement programs across multiple local, state, and federal resources, while confirming that documentation is accurate, and all obligations and funding are properly tracked to prevent duplication of benefits and any future audit findings. Our management efforts will include the following components:

- Establishment of a refined, relevant, and specific job description for each team member, based upon project needs, time frames, and conditions.
- Implementation of valid time-estimating procedures and protocols to closely monitor achievements and contain costs.
- Communication of specific staff performance standards that are measurable and geared toward project closure.
- Establishing a scalable monitoring and oversight plan that will be active throughout the program delivery, to identify and anticipate problem areas, and develop solutions based on clear and specific standards of performance.

Atkins ensures the accuracy of documents through the development of project-specific plans, assignment of project quality managers (PQM), use of established quality processes, and performance of audits. More importantly, our oversight and project management emphasizes the following priorities:

- Responsiveness
- Effective communication
- Trust

We know that disaster recovery services require an accounting of every dollar and every hour to facilitate an expeditious eligibility review process and validation for reimbursement. Further, through our effective management, we will establish detailed project and financial tracking, so that response and recovery activities are fully reimbursable for the Town.

Every project at Atkins is required to have a PQM who produces the project Quality Assurance plan (QAP), regularly communicates that plan to project staff, and audits the project to verify QAP implementation. Atkins requires all work products to complete a QC review by a second set of independent eyes prior to submittal to the client, internal or external. QC reviews must be documented and verified by the PQM to confirm quality procedures have been followed prior to submittal to the client. The project QAP will identify any additional QC reviews required and any non-conforming item is identified and cannot continue through the QC review process until the non-conformance is resolved and closed by the PQM. All milestone deliverables go through our five-step review process.



3.2 Communication, Coordination, and Understanding of the Project

While disasters are unique, our response, method of engagement, and project quality we bring to every client remains steadfast. We have responded to every major disaster in Florida since Hurricane Andrew but also have the unique perspective of working with FDEM as a prime contractor for staff augmentation. Further, we understand and will remain flexible with the Town as you begin to work through contracts and payment prior to federal reimbursement. While we have worked with many communities in response to disasters across the nation, there are multiple similarities to what we have seen firsthand in Fort Myers Beach that compare to Mexico Beach following Hurricane Michael. We are proud to now work with Mexico Beach for resiliency but have helped manager their response from 10 days after landfall. We want to leverage those best practices and lessons learned to assist the Town in all areas of recovery.

As discussed earlier in our detailed approach, Atkins is committed to meeting all deliverables as specified in the scope of work and has nearly 30 years of experience conducting all tasks required—from mobilization to closeout and audit—for disaster recovery contracts. We will also conduct any meetings or act as a liaison for the Town as requested. The Atkins team has worked directly with FEMA, state governments, and local communities in the preparation of disaster-specific guidance, white papers, complex letters, and reports.

We will manage billing and hours to tie directly to direct or indirect costs. Atkins understands the importance of tracking time to direct or indirect costs and has managed the development of Cat Z PWs for clients to accurately capture and reflect time. As part of our work with FDEM, Atkins tracks

time per person, per project, per hour, and per activity for direct and indirect activities, per the PA guidance. We will track and forecast costs by person, project, and type of activity, both internally in our Oracle timekeeping system and for our reporting to the Town.

Atkins utilizes both internal and external tracking systems for managing documentation, reviews, and eligible costs for reimbursement. We bring a wealth of knowledge and expertise from working in multiple programs both internally and externally with clients, and in the document management and storage of data for reporting to regulatory agencies. **Figure 9**, below, is an example of the type of detailed financial reporting the Atkins team is responsible for in the implementation of reviews for FDEM, as a prime contractor supporting COVID-19 recovery.

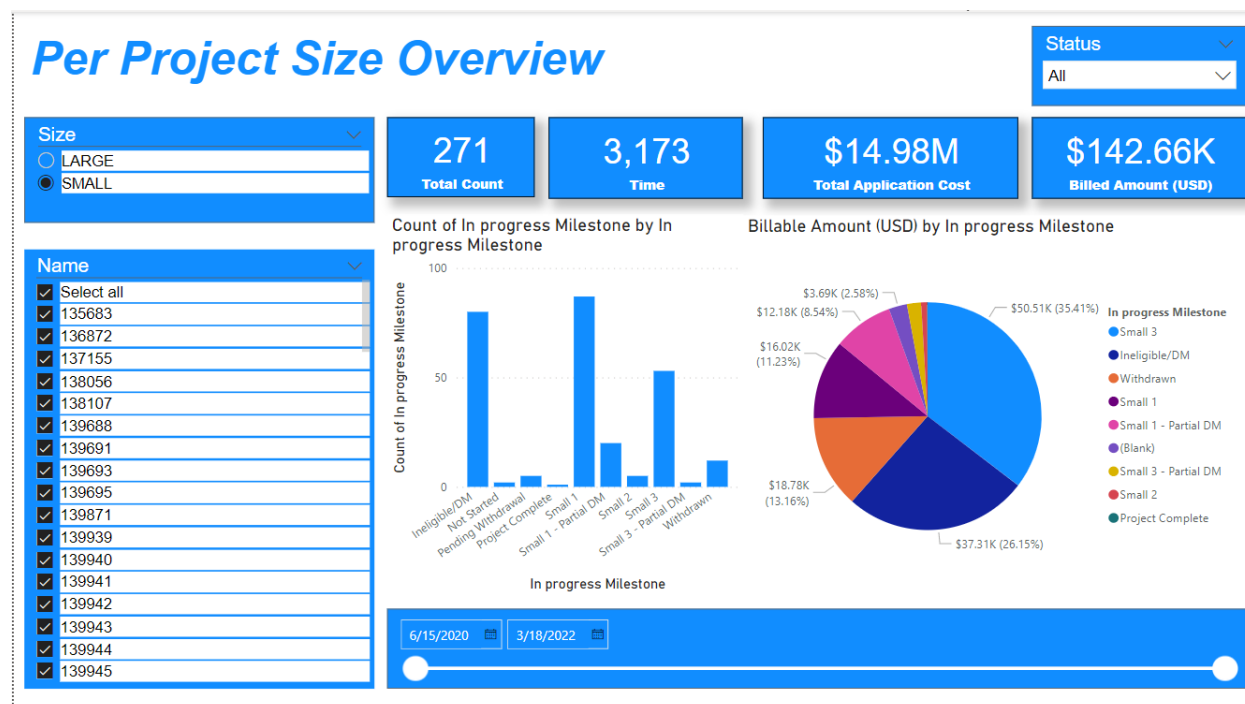


Figure 9. Examples of Financial Tracking/Reporting for FDEM

Section 4 – References

Hurricane Michael Comprehensive Disaster Recovery

Client: City of Mexico Beach, FL

Period of Performance: 2018–2023

Point of Contact: Doug Baber, City Administrator, 850.648.5700, ext. 3,
d.baber@mexicobeachgov.com

COVID-19 Public Assistance Disaster Recovery Grant Management

Client: Florida Division of Emergency Management (FDEM)

Period of Performance: 2020–2024

Point of Contact: Kevin Adkison, Public Assistance Officer, 850.570.7073,
kevin.adkison@em.myflorida.com

Statewide Comprehensive Disaster Recovery Services

Client: South Carolina Emergency Management Division (SCEMD)

Period of Performance: 2014–2022

Point of Contact: Emily Bentley, Chief of Recovery and Mitigation, 803.737.8500, ebently@emd.sc.gov

Hurricane Harvey Recovery and Mitigation Services

Client: City of Houston

Period of Performance: 2022–2027

Point of Contact: David Wurdlow, Assistant Public Works Director, 832.395.2054,
david.wurdlow@houstontx.gov

Section 5 – Fee Schedule

All services are based on time and materials with a not-to-exceed limit. It is anticipated that staff will be assigned on an as-needed basis by the Town of Fort Myers Beach. Any limits can be negotiated and set through a master contract agreement or specific task order for services. Pre-approved expenses will be billed at the Government Services Administration (GSA) rate (<https://www.gsa.gov/travel/plan-book/per-diem-rates>).

Atkins has a long history of delivering PA services contracts well under the allowable federal limits for reimbursement. Maintaining this track record is key to our reputation and differentiates us from our competitors. When comparing overall costs for this type of work, Atkins routinely delivers more value to the client for less overall costs. As stated in our opening letter, on just one such recent project for Mexico Beach, we helped the city recover **more than \$100M, all of which was 100% reimbursable**.

As a result of our pricing strategy and experience, our clients can enjoy an increased level of confidence that our cost for services on task associated with federal reimbursement routinely fall well below the reimbursement limits and our overall costs are proven to be below our competition.

All staff will be billed based on job duties in alignment with the rates contained below. As there are several unknowns related to the overall program needs, multiple billing rate categories were provided to allow for the accommodation of various staff that may be needed and/or utilized over the life of the project.

Staff will be billed based on job duties in alignment with the shown rates in Table 4. As there are several unknowns related to the overall program needs, if additional staff are needed and/or utilized they will be billed in accordance with the “Additional Staff Billing Categories.”

Table 4. Hourly Rate by Labor Category

Labor Category	Hourly Rate
Core Team Billing Categories	
Project Manager	\$190.00
Subject Matter Expert	\$200.00
Senior Specialist	\$180.00
Planner/Engineer III	\$175.00
Planner/Engineer II	\$150.00
Planner/Engineer I	\$130.00
Technical Specialist	\$110.00
Data Manager	\$100.00
Additional Staff Billing Categories	
Principal	\$272.00
Senior Consultant	\$195.00
Consultant	\$155.00
Junior Consultant	\$125.00
Program and Administrative	\$85.00

Atkins presents a flexible approach and will only assign staff as needed, directed, and as agreed upon by the Town. While we have presented a large staff and robust team, we will work with the Town for establishing the right resources for any specific tasks.

Section 6 – Attachments/Forms

6.1 RFP Required Forms and Contract Exhibits

- Public Entity Crimes Statement
- Proposal Form Acknowledgment and Corporate Information, including Town Permits/Fees required statement and addenda acknowledgment
- Information Sheet for Transactions and Conveyances – Corporate Identification
- Certificate of Liability Insurance (Note: This will be completed and Fort Myers Beach added upon award.)
- IRS Form W-9 – Request for Taxpayer Identification Number and Certification
- Exhibit I – Federal Contract Provisions and Assurances: Compliance with Federal Law, Regulations, and Executive Orders and Acknowledgment of Federal Funding
- Exhibit I – Federal Contract Provisions and Assurances: Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
- Exhibit I – Federal Contract Provisions and Assurances: Anticipated Disadvantaged, Minority, Women, or Veteran Participation Statement, Collier County
- Exhibit I – Federal Contract Provisions and Assurances: Lobbying Certification

SWORN STATEMENT UNDER SECTION 287.133 (3) (A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES
This form must be signed in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to the TOWN OF FORT MYERS BEACH by
Chalotte Maddox

(Print individual's name and title)

for Atkins North America Inc.

(Print name of entity submitting sworn statement) whose business address is

59-0896138

and (if applicable) its Federal Employer Identification Number (FEIN) is

If the entity has no FEIN, include the Social Security Number of the individual signing this Sworn Statement: _____

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision or any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt of a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime; or

2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of public entity crime.

5. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with legal power to enter into a binding contract and which bids or appeals to bid on contracts for the provision of goods and services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Indicate which statement applies.)

X Neither the entity submitting this sworn statement, nor one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

X The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

X The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officers determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (ATTACH A COPY OF THE FINAL ORDER).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR A CATEGORY TWO OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

(Signature)

Sworn to and subscribed before me this 3 day of

November

2022

Personally known X

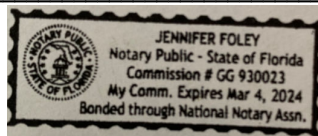
Or produced identification _____

Notary Public-State of Florida

My commission expires March 4, 2024

Jennifer Foley

(Printed, typed, or stamped commissioned name of notary public.)



PROPOSAL FORM

Town of Fort Myers Beach, Florida

Date: 11/3/2022

The undersigned, hereinafter called "Proposer", having reviewed the scope of services requested and familiarized themselves with the local conditions, nature of the work, and having carefully developed an acceptable method of providing services as described herein, and having carefully examined the form of agreement and contract documents shall furnish all materials, labor, services and any other items for the proper execution of contract number **RFP-23-01-AD** at the proposed price stated within this proposal.

Information for Proposal Fee to be included within the Proposal Format Part II (TO BE FILLED IN)

CONTRACTOR REQUIREMENTS

Acknowledgment is hereby made of receipt of the following addenda issued during the proposal period:

Addendum No. 1 Date 10/24/22 Addendum No. _____ Date _____

Addendum No. 2 Date 10/31/22 Addendum No. _____ Date _____

(PLEASE TYPE INFORMATION BELOW)

SEAL IF PROPOSAL IS BY CORPORATION

State of Florida Department of State Certificate of Authority

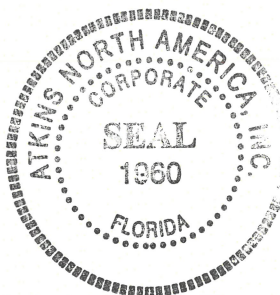
Proposer Atkins North America, Inc.

Document Number 233840

By Charlotte Maddox

Occupational License No. EB 0000024

Signature _____



NOTE: By signing and submitting this Proposal for consideration by the Town of Fort Myers Beach, Florida the vendor acknowledges that they have read, understand and agree to all aspects of the specifications as presented without reservation, exception or alteration.

[if applicable]

Florida DBPR Contractor's License, Certification and/or

Title N/A

Registration No. _____

Address _____

Type of Contractor's License, Certification and/or
Registration _____

Expiration Date _____

Person to contact concerning this bid:

Phone/Toll Free/Fax _____

Page 2 of 2
RFP-23-01-AD

Town Permits/Fees required for this project: N/A

Home Page Address

Permit Cost

Person to contact for emergency service:

Phone/Cell/Pager No.

Person to contact for disaster service:

Home Address:

Home Phone/Cell/Pager No:

Names and addresses of proposed Subcontractors to be utilized for work on this project:

1.

2.

3.

4.

**Information Sheet
for Transactions and Conveyances
Corporation Identification**

The following information will be provided to the Town for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, capitalization, etc. is exactly as registered with the state or federal government.

(Please Circle One)

Is this a Florida Corporation:

Yes or No

If not a Florida Corporation,

In what state was it created: _____

Name as spelled in that State: _____

What kind of corporation is it:

"For Profit" or "Not for Profit"

Is it in good standing:

Yes or No

Authorized to transact business in Florida:

Yes or No

State of Florida Department of State Certificate of Authority Document No.: 233840

Does it use a registered fictitious name:

Yes or No

Names of Officers:

President: _____ Secretary: _____

Vice President: _____ Treasurer: _____

Director: _____ Director: _____

Other: _____ Other: _____

Name of Corporation (As used in Florida):

Atkins North America, Inc.

(Spelled exactly as it is registered with the state or federal government)

Corporate Address:

Post Office Box: _____

Town, State Zip: _____

Street Address: 4030 Boy Scout Blvd. Suite 700

Town, State, Zip: Tampa, FL 33607

(Please provide post office box and street address for mail and/or express delivery; also for recorded instruments involving land.)

Information Sheet continued
Page 2 of 2

Corporate Identification

Federal Identification Number: 59-0896138

(For all instruments to be recorded, taxpayer's identification is needed)

Contact person for company: Charlotte Maddox

Telephone Number: 813-282-7275 Facsimile Number: 813-281-7698

Name of individual who will sign the instrument on behalf of the company:

Charlotte Maddox

(Upon Certification of Award, Contract shall be signed by the President or Vice-President. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded contractor shall submit a copy of the resolution together with the executed contract to the Office of Purchasing.)

(Spelled exactly as it would appear on the instrument)

Title of the individual named above who will sign on behalf of the company:

Vice President



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
04/27/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MARSH USA, INC. TWO ALLIANCE CENTER 3560 LENOX ROAD, SUITE 2400 ATLANTA, GA 30326	CONTACT NAME: PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL ADDRESS:
CN102421774-Atkin-GAWU-21-22	INSURER(S) AFFORDING COVERAGE INSURER A : Zurich American Insurance Company INSURER B : N/A INSURER C : INSURER D : INSURER E : INSURER F :
INSURED Atkins North America, Inc. 4030 West Boy Scout Blvd. Ste. 700 Tampa, FL 33607-5713	NAIC # 16535 N/A

COVERAGES **CERTIFICATE NUMBER:** ATL-005066149-27 **REVISION NUMBER:** 3

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:			GLO0137576-07	10/15/2021	10/15/2022	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 50,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000
A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			BAP0137575-07	10/15/2021	10/15/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	☐ UMBRELLA LIAB ☐ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
A	☒ WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☒ Y ☒ N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	WC0137577-07	10/15/2021	10/15/2022	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Evidence of Coverage/Specimen

CERTIFICATE HOLDER Atkins North America, Inc. 4030 West Boy Scout Blvd. Ste. 700 Tampa, FL 33607-5713	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE of Marsh USA Inc <i>Carolyn Stancel</i>
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
04/27/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MARSH USA, INC. TWO ALLIANCE CENTER 3560 LENOX ROAD, SUITE 2400 ATLANTA, GA 30326	CONTACT NAME: PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL ADDRESS:
CN102421774-Atkin-EO-22-23	INSURER(S) AFFORDING COVERAGE INSURER A : Lloyd Underwriters
INSURED Atkins North America, Inc. 4030 West Boy Scout Blvd. Ste. 700 Tampa, FL 33607-5713	NAIC # 32727
	INSURER B :
	INSURER C :
	INSURER D :
	INSURER E :
	INSURER F :

COVERAGES **CERTIFICATE NUMBER:** ATL-005389118-30 **REVISION NUMBER:** 6

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ Y ☒ N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				☐ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability (claims made policy)			B0509FINPA2250024	04/30/2022	04/30/2023	Limit: Per Claim 1,000,000 Annual Aggregate: 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Evidence of Coverage/Specimen

CERTIFICATE HOLDER

Atkins North America, Inc.
4030 West Boy Scout Blvd. Ste. 700
Tampa, FL 33607-5713

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
of Marsh USA Inc

Carolyn Stancel

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ADDITIONAL REMARKS SCHEDULE

AGENCY MARSH USA, INC.		NAMED INSURED Atkins North America, Inc. 4030 West Boy Scout Blvd. Ste. 700 Tampa, FL 33607-5713
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
 FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

Professional Liability:

Professional Liability placement was made by Marsh Canada. Marsh USA has only acted in the role of a consultant to the client with respect to the placement, which is indicated here for your convenience.

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Atkins North America, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

4030 W. Boy Scout, Blvd, Suite 700

6 City, state, and ZIP code

Tampa, FL 33607

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type.
See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
			-					

or

Employer identification number									
5	9	-	0	8	9	6	1	3	8

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

Aaron M Kelley

Date ► August 31, 2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

**Compliance with Federal Law, Regulations, And Executive Orders
and Acknowledgement of Federal Funding**

Certification

This is an acknowledgement that FEMA financial assistance will be used to fund all or a portion of the contract. The contractor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives.

If the Contractor subcontracts any of the work required under this Agreement, a copy of the signed subcontract must be available to the County for review and approval. The Contractor agrees to include in the subcontract that (1) the subcontractor is bound by the terms of this Agreement, (ii) the subcontractor is bound by all applicable state and federal laws and regulations, and (iii) the subcontractor shall hold the County and the Grantor Agency harmless against all claims of whatever nature arising out of the subcontractor's performance of work under this Agreement, to the extent allowed and required by law. The County may document in the quarterly report the Contractor's progress in performing its work under this agreement.

On behalf of my firm, I acknowledge, the grant requirements identified in this document.

Vendor/Contractor Name Atkins North America, Inc.

Date 11/1/2022

Authorized Signature  _____

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY
and VOLUNTARY EXCLUSION**

Contractor Covered Transactions

- (1) The prospective subcontractor of the Sub-recipient, Collier County, certifies, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the Sub-recipient's subcontractor is unable to certify to the above statement, the prospective contract shall attach an explanation to this form.

CONTRACTOR

Atkins North Americ, Inc.

By: 

Signature

Charlotte Maddox

Name and Title

4030 W Boy Scout Blvd. Suite 700

Street Address

Tamp,FL 33607

City, State, Zip

UEI Unique Entity Identifier (for SAM.gov verification)

11/1/2022

Date

Sub-Recipient Name: Collier County Board of County Commissioners

DEM Contract Number: TBD

FEMA Project Number: TBD

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

COLLIER COUNTY																					
ANTICIPATED DISADVANTAGED, MINORITY, WOMEN OR VETERAN PARTICIPATION STATEMENT																					
Status will be verified. Unverifiable statuses will require the PRIME to either provide a revised statement or provide source documentation that validates a status.																					
A. PRIME VENDOR/CONTRACTOR INFORMATION																					
PRIME NAME		PRIME FEID NUMBER		CONTRACT DOLLAR AMOUNT																	
Atkins North America, Inc.		59-0896138																			
IS THE PRIME A FLORIDA-CERTIFIED DISADVANTAGED, MINORITY OR WOMEN BUSINESS ENTERPRISE? (DBE/MBE/WBE) OR HAVE A SMALL DISADVANTAGED BUSINESS 8A CERTIFICATION FROM THE SMALL BUSINESS ADMINISTRATION? A SERVICE DISABLED VETERAN?		VETERAN Y N DBE? Y N MBE? Y N WBE? Y N SDB 8A? Y N		IS THE ACTIVITY OF THIS CONTRACT... CONSTRUCTION ? Y N CONSULTATION? Y N OTHER? Y N																	
IS THIS SUBMISSION A REVISION?		Y N		IF YES, REVISION NUMBER _____																	
B. IF PRIME HAS SUBCONTRACTOR OR SUPPLIER WHO IS A DISADVANTAGED MINORITY, WOMEN-OWNED, SMALL BUSINESS CONCERN OR SERVICE DISABLED VETERAN, PRIME IS TO COMPLETE THIS NEXT SECTION																					
DBE VETERAN	M/WBE	SUBCONTRACTOR OR SUPPLIER NAME	TYPE OF WORK OR SPECIALTY	ETHNICITY CODE (See Below)	SUB/SUPPLIER DOLLAR AMOUNT																
TOTALS:																					
C. SECTION TO BE COMPLETED BY PRIME VENDOR/CONTRACTOR																					
NAME OF SUBMITTER		DATE		TITLE OF SUBMITTER																	
Atkins North America, Inc.		11/1/2022		Vice President																	
EMAIL ADDRESS OF PRIME (SUBMITTER)		TELEPHONE NUMBER		FAX NUMBER																	
charlotte.maddox@atkinsglobal.com		813-282-7275		813-281-7698																	
NOTE: This information is used to track and report anticipated DBE or MBE participation in federally-funded contracts. The anticipated DBE or MBE amount is voluntary and will not become part of the contractual terms. This form must be submitted at time of response to a solicitation. If and when awarded a County contract, the prime will be asked to update the information for the grant compliance files.																					
<table border="1" style="margin: auto; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th style="text-align: left;">ETHNICITY</th> <th style="text-align: left;">CODE</th> </tr> </thead> <tbody> <tr><td>Black American</td><td>BA</td></tr> <tr><td>Hispanic American</td><td>HA</td></tr> <tr><td>Native American</td><td>NA</td></tr> <tr><td>Subcont. Asian American</td><td>SAA</td></tr> <tr><td>Asian-Pacific American</td><td>APA</td></tr> <tr><td>Non-Minority Women</td><td>NMW</td></tr> <tr><td>Other: not of any other group listed</td><td>O</td></tr> </tbody> </table>						ETHNICITY	CODE	Black American	BA	Hispanic American	HA	Native American	NA	Subcont. Asian American	SAA	Asian-Pacific American	APA	Non-Minority Women	NMW	Other: not of any other group listed	O
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Non-Minority Women	NMW																				
Other: not of any other group listed	O																				
D. SECTION TO BE COMPLETED BY COLLIER COUNTY																					
DEPARTMENT NAME		COLLIER CONTRACT # (IFB/RFP or PO/REQ)		GRANT PROGRAM/CONTRACT																	
ACCEPTED BY: _____					DATE																
					11/1/2022																

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

LOBBYING CERTIFICATION
(To be submitted with each bid or offer exceeding \$100,000)

The undersigned [Contractor] certifies, to the best of his or her knowledge, that:

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

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Contractor certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

Atkins North America, Inc.

Contractor (Firm Name)



Signature of Contractor's Authorized Official

Charlotte Maddox Vice President

Name and Title of Contractor's Authorized Official

11/1/2022

Date

1. Title Page

TOWN OF FORT MYERS BEACH, FLORIDA

DISASTER RECOVERY CONSULTANT SERVICES

RFP 23-01-AD



Submitted to

Town of Fort Myers Beach
2525 Estero Boulevard
Fort Myers Beach, FL 33931

Contact Person

Bill Slater
Vice President of Recovery
400 International Parkway, Suite 300
Lake Mary, Florida 32746
Cell: 315.440.4775
bslater@tidalbasin.rphc.com

November 3, 2022



Tidal Basin Government Consulting, LLC
675 N. Washington Street, Suite 400, Alexandria, VA 22314
888.282.1626 | tidalbasingroup.com

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3. Letter of Transmittal

Date: November 3, 2022

Town of Fort Myers Beach, Florida

2525 Estero Boulevard

Fort Myers Beach, Florida 33931

Subject: RFP 23-01-AD, Disaster Recovery Consulting Services

Dear Sir/Madam,

Tidal Basin Government Consulting, LLC (Tidal Basin) understands that the Town of Fort Myers Beach (the Town) looks to hire an experienced firm to provide consulting services to assist with the administration of grants through various federal programs. Tidal Basin employs top talent from the emergency management and recovery industry who bring expertise in successfully supporting financial recovery for federal, state, local government, and private sector clients. We take pride in our ability to assist all clients, including the Town, to identify and achieve emergency management and disaster recovery goals. We were founded on the principles of maintaining the high integrity of our staff, delivering quality work at the best possible price, and delivering results for our clients so they can maximize their return on investment.

We have been a trusted partner of the Town of Fort Myers Beach for many years. The Town will continue to benefit from our cutting-edge reimbursement knowledge in handling catastrophic losses. Whether the need involves strategic planning, targeting grants and funding resources, staff training and augmentation, or resolving the Town's property insurance claims; we deliver expert-level guidance, technical assistance, and advisory services in current disaster recovery efforts and those yet to be experienced. Our firm possesses the requisite understanding of the outlined scope of services and tasks and will provide a top-notch team of experts to execute the goals, objectives, and intentions of Fort Myers Beach.

Tidal Basin's consulting team consists of over 2,000 full and part-time employed, deployable consultants that include insurance professionals, emergency managers, project managers, licensed engineers, planners, instructors, housing inspectors and specialists in specific disaster-related disciplines. We employ some of the most widely respected professionals in the industry, offering unparalleled, hands-on experience in the fields of emergency management, public safety, contingency development, disaster operations, all-hazard training, continuity of operations, and loss mitigation. Our leadership team includes seasoned senior staff and policy/program subject matter experts who have successfully negotiated every major disaster event in the last 35+ years.

Tidal Basin's reputation for strategic thinking and effective management of the total financial recovery process has gained us experience of some of the most challenging and high-profile losses of the past quarter century. We have assisted with recoveries that required extreme flexibility, technical expertise, and the ability to mobilize quickly.

Our knowledge of the FEMA Public Assistance program, as well as numerous other funding streams, including the Hazard Mitigation Grant Program (HMGP), is unmatched, and we are ready to continue assisting the Town upon activation. We are prepared to offer in-person assistance as needed and have

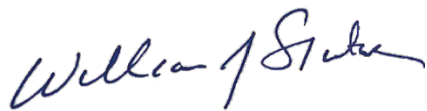
also developed a remote approach to maintain forward progression both during these uncertain times and as a cost-effective long-term approach.

We have enduring relationships with our clients because of our unwavering dedication to professionalism; unsurpassed knowledge of policy, systems, and agencies; and a focus on tailoring our work product, communication, and reporting structures to fit your organizational needs. Everything from our personalized approach to service and dedicated leadership team, to our customized project management system and daily and weekly reports are designed to provide the Town with the insights, intelligence, and guidance necessary to make well-informed leadership decisions before, during and after a disaster event. Tidal Basin looks forward to the opportunity to continue our laser focus on excellence, expertise, and exceeding expectations on the Town's behalf, and commits to perform the services outline in the RFP.

As Vice President, I am authorized to negotiate terms, render binding decisions, commit the firm's resources, and receive correspondence regarding this RFP.

We thank you in advance for your consideration.

Sincerely,



Bill Slater, Vice President

M: 315-440-4775 | E: bslater@tidalbasin.rphc.com

"Tidal Basin Government Consulting, LLC is a wholly owned subsidiary of Tidal Basin Holdings, LLC. Tidal Basin Holdings, LLC is a wholly owned subsidiary of Rising Phoenix Holdings Company, formerly known as Adjusters International, Inc. Any reference made to Tidal Basin within this document relates to Tidal Basin Government Consulting, LLC and its parent companies."



AI_050_1

4. Background, Experience and Qualifications of the Proposer



In 1985, thirteen (13) of the industry's leading public adjusting firms joined forces to bring insurance policyholders who had suffered property loss and damage, a groundbreaking standard of recovery assistance. The new organization — **Adjusters International (AI)** — could quickly offer a team of top professionals virtually anywhere at any time, delivering an unprecedented level of expertise, experience, advocacy, and service to help the insured recover from property losses that were frequently disastrous in scope. Adjusters International became the largest and most respected organization in its field. With over 40 offices throughout the U.S. and Canada, AI has helped policyholders of all types recover from many of the worst natural and man-made disasters, including the 1993 World Trade Center Bombing, the 1995 Oklahoma City Bombing, the 2001 World Trade Center attacks, the 2010 BP Oil Spill and many more major disasters over nearly four (4) decades.

In 1996, Adjusters International recognized the need to provide the same level of expertise, advocacy, and service to eligible government entities and non-profit organizations that had suffered a disaster and were seeking recovery under FEMA's Public Assistance (PA) grants program — guiding them through the complicated application process. Key projects worked on include Hurricanes Katrina, Dennis, Rita, and Wilma, the Iowa floods in 2008, Superstorm Sandy and numerous more.

In 2016 Adjusters International merged with leading experts in emergency management and disaster recovery, Tidal Basin, founded by Daniel Craig. Prior to founding Tidal Basin in 2006, Daniel Craig served as FEMA's Associate Administrator for the Recovery Division under President George W. Bush. While at FEMA, Mr. Craig also served in roles including the Regional Administrator for Region I where he was responsible for managing FEMA's preparedness, mitigation, response, recovery, and training activities in the New England region.

In 2018, Rising Phoenix Holdings Corporation was formed to manage the combination of Adjusters International, Ltd., Tidal Basin Group, and its sub-entities, including Tidal Basin Government Consulting, LLC, Tidal Basin Caribe, LLC and Tidal Basin Federal, LLC.

Tidal Basin takes a hands-on approach, with a core mission of achieving a full financial and physical recovery for our clients who are eligible to receive assistance from the FEMA Public Assistance (PA) program, Hazard Mitigation Assistance (HMA) grants, HUD (Housing and Urban Development) Community Development Block Grant- Disaster Recovery and Mitigation (CDBG-DR/CDBG-MIT), insurance, U.S. Department of Treasury and all other available funding sources following a disaster. We provide unmatched experience and resources to organizations, businesses, governments, and communities in helping them prepare for, respond to, recover from, and mitigate natural and human-made disasters.

A Limited Liability Company, Tidal Basin employs over 200 full-time employees nationally.

The Tidal Basin Difference

Tidal Basin has an established history of providing both program and grant management services to clients across the United States and its territories. Our proven programmatic expertise is backed by a well-honed recruitment and training program; field-tested quality assurance, logistics, and operations management processes; and extremely low turnover, particularly among our management team.

Tidal Basin provides the highest-level program and policy expertise and works together with our clients, partners and stakeholders to ensure our work complies with program eligibility requirements and applicable codes, standards and regulations. Tidal Basin's program and policy experts are armed with unmatched knowledge and expertise that allows us to communicate with federal, state or local regulatory agencies, like FEMA, HUD, US Treasury, etc. on behalf of our clients with authority in our efforts to preserve and obtain available federal reimbursements.

To ensure strict adherence to written program policies and federal regulations, we offer high levels of file compliance oversight. Our quality principles for compliance include upfront QA/QC reviews, well-documented processes and analytical reviews supported by methods for project management and controls, data management and reporting, audit proofing, and financial management. Subject Matter Experts (SMEs) are available for ongoing consultation on any policy guidance or compliance area. When scenarios warrant additional reviews, we escalate issues and request formal policy clarifications.

The Tidal Basin team have responded to 30 + disasters in the last 13 years for the state of Florida and has provided dedicated staff to the states of Alabama, Alaska, Hawaii, Iowa, Louisiana, Massachusetts, Montana, New Jersey, New York, North Carolina, Rhode Island, South Carolina, Texas, Virginia, and the Commonwealth of Puerto Rico. In each event, we have strived to build efficient and effective programs that can be sustained long after our contractual relationship has ended. In each event, we have strived to build efficient and effective programs that can be sustained long after our contractual relationship has ended.

Our long-standing relationships and successful track record of supporting state clients affords our team insight other firms may lack. For more than a decade, the Tidal Basin team has provided technical

HISTORY

1985

- + Adjusters International begins preparing and settling disaster recovery claims

1996

- + Adjusters International begins providing grant management and advocacy services to FEMA-eligible government entities and non-profit organizations

2006

- + Tidal Basin founded

2016

- + Tidal Basin expanded offerings to include disaster preparedness and resiliency services

2018

- + Rising Phoenix Holdings Corporation Formed
- + Tidal Basin Caribe founded

2020

- + Tidal Basin Federal, LLC founded

support and staff augmentation at the state level, supporting applicants and sub-applicants to develop Hazard Mitigation Assistance Program applications (including HMGP, FMA, and BRIC) all while prioritizing the needs of the state. Our approach includes strategic guidance and technical expertise accompanied by the development of tools, training, and direct assistance to support successful application development and subsequent implementation by our clients.

Effective disaster recovery and resiliency consulting does not only mean securing funding on the front-end, but also protecting funding from potential negative audit findings due to non-compliance, lack of documentation, or inadequate eligibility justification. Our deep understanding of disaster recovery and relief programs, along with our hands-on experience gained during some of the worst disasters in U.S. history, allows us to effectively reach our client's recovery goals. [Tidal Basin understands what it takes to get things done the right way.](#)



Location of Office and Resources

The Tidal Basin team have maintained a presence in Florida assisting with disaster recovery efforts since Hurricane Andrew in 1992. We have extensive familiarity with recovery operations in Florida and have aided over 30 Florida communities to-date, guiding our clients through their insurance and FEMA recoveries. We have experience with emergencies such as hurricanes and major flooding events, as well as a deep understanding of FEMA, FHWA and FDOT. This intimate familiarity and level of involvement enables our in-depth understanding of the unique needs and challenges Florida faces following catastrophic events.

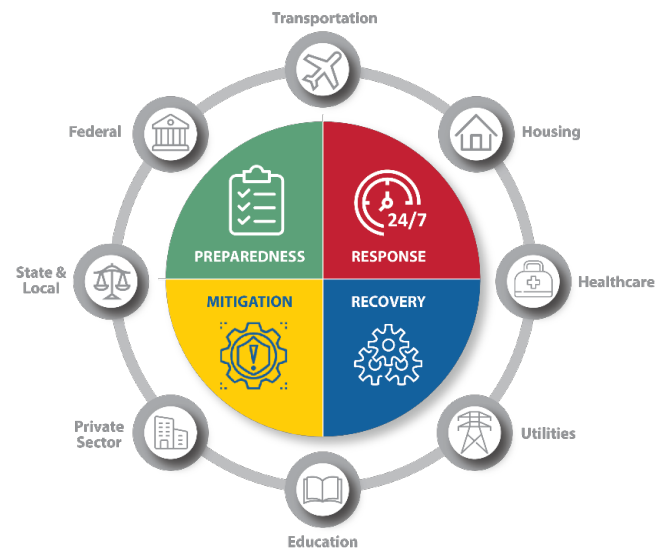
For this engagement, the Tidal Basin team will utilize our office in Lake Mary, Florida to best suit the needs of the Town. Depending on project needs, efficiency, and the requirements of the Town, the project will be managed on-site or remotely.

When awarded a contract, Tidal Basin will dedicate both full-time and cadre staff to support the Town's disaster recovery needs. Although we have numerous ongoing projects throughout the country, we pride ourselves in always meeting the unique needs of each of our clients and if necessary, adjusting work assignments to meet those needs.

Our Team

The Tidal Basin Team prides itself on the support we provide while guiding our clients through the comprehensive emergency management and disaster recovery process. We are committed to serving our clients through shared expertise and transfer of our knowledge to build their capacity. Since most of our leadership team have been in our client's shoes as former federal, state, and local government emergency leadership themselves, we bring a unique understanding of the needs and challenges our clients face following devastating events.

Each member of Tidal Basin's team has deep expertise in managing and administering emergency and disaster management programs for government and business resiliency planning, community and economic development, housing and infrastructure, and critical infrastructure facilities including healthcare systems, educational facilities, and aviation and rail transit. We are also highly experienced and knowledgeable in providing strategic advice at the federal, state, and local levels.

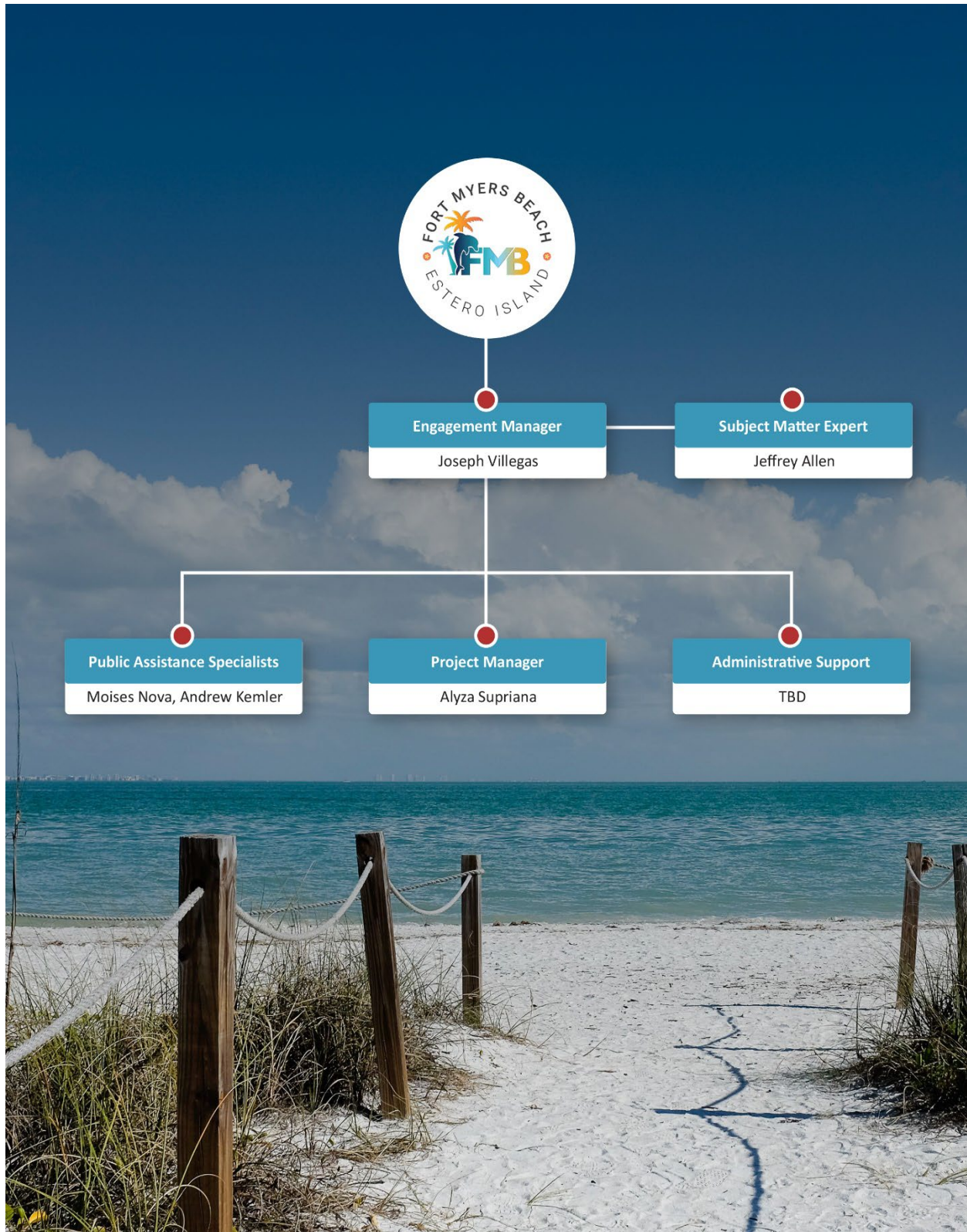


Tidal Basin provides the highest-level program and policy expertise and works together with our clients, partners, and stakeholders to ensure our work complies with program eligibility requirements and applicable codes, standards, and regulations. To ensure strict adherence to written program policies and federal regulations, we offer elevated levels of file compliance oversight. Our quality principles for compliance include upfront QA/QC reviews, well-documented processes and analytical reviews supported by methods for project management and controls, data management and reporting, audit proofing, and fiscal management. Subject Matter Experts (SMEs) are available for ongoing consultation on any policy guidance or compliance area. When scenarios warrant additional reviews, we escalate issues and request formal policy clarifications.

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Organizational Chart and Resumes

On the following pages, Tidal Basin provides an organizational chart and resumes of proposed staff best suited to fit the needs of the Town of Fort Myers Beach.



Joseph Villegas

ENGAGEMENT MANAGER

EDUCATION

- BS, Business/Corporate Communications, Walsh University
- FEMA Emergency Management Institute, Professional Studies, 2017-2018

AREAS OF EXPERTISE

- Emergency Management
- Team Building
- Leadership
- Strategic Planning
- Disaster Response
- Public Safety
- NIMS

CERTIFICATIONS

- FEMA Advanced Academy, 2019
- FEMA Basic Academy, 2018

BOARD AND COMMITTEE MEMBERSHIPS

- International Association of Emergency Managers
- Wayne County 911 Advisory Committee
- State of Ohio Multi-Agency Radio Communications Local Sub-Committee
- University of Akron – Emergency Management and Homeland Security Program Advisory Committee
- Emergency Management Association of Ohio – Vice President

PROFILE

Mr. Villegas is a professional communicator focused on coordinating resources. He excels in managing multiple, concurrent projects with strong problem solving, decision making through difficult situations, and follow-through capabilities.

RELEVANT EXPERIENCE

Deputy Director of Public Assistance and Recovery, Tidal Basin Government Consulting, LLC, June 2022 – Present

Responsible for oversight of Project Managers and Client Engagement for the Recovery and Public Assistance business unit. Also responsible for quality assurance and the professional development of the project team members.

Director, Wayne County Emergency Management Agency, Wayne County, Ohio, December 2011 – May 2022

- + Ensured disaster resilience in Wayne County (Ohio) by performing preparedness and mitigation activities while functioning as emergency and resource coordinator during and after major incidents.
- + Created a collaborative environment for community leaders, first response, and local, state, and national organizations to build a county disaster management program.
- + Public relations strategist with extensive experience directing campaigns to promote disaster preparedness and mitigate the effects of any crisis.
- + Designated as Public Information Officer in many communities within Wayne County Ohio.
- + Problem solving and crisis communication in an often politically sensitive or contentious scenario to meet emergency management objectives between jurisdictions.
- + Monitored and influence state and local legislation that affect the public safety community.

- + Coordinated training and funding to build better public safety response capability via emergency exercises, hazard/risk assessments, and identify training and resource gaps.
- + Successfully completed grant program applications through FEMA/Homeland Security, and other state and local grants to fund emergency services and mitigation projects.
- + Infrastructure project management that included communication tower construction, flood mitigation projects, conversion of flood affected communities to green space which includes demolition and debris management.
- + Strong written, communication and presentation skills including meeting facilitation for both small and large audiences. Regularly invited to address members of local charitable organizations.
- + Responsible for maintaining multiple emergency plans which includes, Emergency Operations Plans, Disaster Mitigation Plan, Hazmat Plan, and the Continuity of Operations Plan.
- + President Elect for the Emergency Management Association of Ohio with goals to improve emergency management as a profession.
- + Public engagement on social media to promote disaster preparedness.
- + Emergency Coordinator for the Local Emergency Planning Committee.
- + Member of an Advisory Committee for the University of Akron, Emergency Management and Homeland Security Undergraduate Program.

Vice President-Operations, FSI North America, Sheffield Lake, Ohio, September 2005 – December 2011

- + Developed marketing strategies to enhance sales performance in domestic, military/government and international channels through authorized distributors including large national accounts, prime vendor contractors, GSA contract holders, and catalog houses.
- + Responsible for opening and maintaining new market segments.
- + Product and safety training for Emergency and Disaster Management, Hazmat Teams, Medical Safety Teams and other functions related to first response (client facing).
- + Increased the company's presence in the healthcare market through sales presentations. Created targeted strategies by monitoring the healthcare industry's spending priorities and budget cycles.
- + Opened new manufacturing channels in Asia to protect proprietary information and improve cost of goods. This allowed the company to realize an over-all 13% in cost reduction while meeting a strategic goal to improve intellectual property.
- + Opened new sales channels in Singapore, China, Thailand and the Philippines through manufacturers' representatives.
- + Improved data security, prevented data loss, create a stronger email security, and prevent cyberattacks by securing firewalls and replacing network appliances.

Owner/Contract Consultant, Genesis One Technologies Inc. Wooster, Ohio, October 2001-September 2005

- + Designed and developed assistive technology for people with severe disabilities.
- + Introduced 3 new product lines in the access and functional needs market.
- + Maintained strategic partnerships with hospitals and other facilities offering occupational therapy to develop appropriate assistive technology devices.
- + Identified and wrote grants to help find funding for patients with no insurance.
- + Developed and maintained B2B sales channels through authorized distributors within central to eastern US.

Regional Sales Manager, APT Technology Inc. Shreve, Ohio, September 1999-October 2001

- + Managed and grew existing sales channels via authorized distributors and medical facilities.
- + Opened new geographical markets in the Midwestern states.
- + Developed new relationship between care facilities and durable medical goods distributors **Store**

Manager/Project Manager, Revco Drug Stores, Akron, Ohio, January 1995-August 1999

- + Managed retail stores with up to 50 employees with yearly sales up to \$14M.
- + Maintained proper inventory levels – implemented auto-replenishment in some stores.
- + Maintained appropriate staffing levels based on seasonal needs.
- + Assisted in the installation of new stores within the Akron-Canton (Ohio) area.
- + Managed and motivated grand opening sales staff.

PUBLICATIONS

- + “The Wayne County Emergency Management Agency Shares Lessons Learned.” Cuyahoga County EMA Review. Winter 2014-2015 Edition.
- + “Gathering and Organizing Local Volunteers.” National Emergency Management Advanced Academy White Paper. Emergency Management Institute Resource Section. September 2019.

Alyza Supriana

PROJECT MANAGER

EDUCATION

- M.A., Disaster Management
- B.S., Criminal Justice; Focus in Emergency Management and Homeland Security

AREAS OF EXPERTISE

- FEMA Public Assistance
- HSEEP Exercise development
- Project Management
- Public Assistance Project Closeout
- Grant Management
- Disaster Planning
- Emergency Operation Center (EOC) Experience

PROFILE

Ms. Supriana is an emergency management professional with experience in various hurricanes, severe windstorms, and COVID-19 response. She has served on Community Emergency Response Teams, preparing to activate and respond to Hurricane Matthew and Irma in the State of Florida. She has successfully accomplished over 40 FEMA certifications, HSEEP and more Emergency Management related courses. As Project Manager with Tidal Basin, Ms. Supriana has supported various contracts and has experience with FEMA PA categories A-G and EOC response.

RELEVANT EXPERIENCE

Project Manager, Tidal Basin, May 2020-Present

Project Manager, Financial Recovery Services, Town of Fort Myers Beach, Florida

Ms. Supriana serves as the lead project manager on this contract. Duties include immediately supporting the Town of Fort Myers Beach with their disaster financial recovery from hurricane Ian shortly after landfall. Ms. Supriana provides support with response and initial recovery processes, including project development and monitoring eligible costs, documentation guidance and review, coordination with federal, state, and local partners, briefing town representatives daily, training staff on the PA process and serving a liaison for FEMA PA questions and guidance between FMB, FDEM and FEMA, and other disaster relief programs.-She supports the day-to-day duties of the public assistance program and provides technical, policy and procedural guidance for the Town of Fort Myers Beach.

Grant Manager, FEMA Public Assistance Grant Management, City of Marion, IA

Ms. Supriana provides overall project management on this contract. Her specific responsibilities include scheduling, cost estimating, day to day contract management, client communication, policy review and guidance, project identification and document tracking. The client chose Tidal Basin to perform Grant Management services in response to

Severe Storms Derecho. The Tidal Basin team provides grant management solutions as part of the FEMA Public Assistance (PA) program. Ms. Supriana provides support with compliance activities, including grant reporting, documentation guidance and review, budget monitoring, and site inspection guidance.

Consultant, COVID-19, Z0115, Florida Division of Emergency Management

Ms. Supriana assists in the overall project management on this contract. Her specific responsibilities include quality control and review, training staff, project development, and supporting day to day contract management, and providing updates to state leadership. The client chose Tidal Basin to perform Grant Management services in response to the COVID-19 Pandemic, which includes supporting subrecipients with technical, policy and procedural needs. The Tidal Basin team provides grant management solutions as part of the FEMA Public Assistance (PA) program.

EOC Staff Support, Response Unit, State of Colorado EOC

Ms. Supriana provided support to EOC staff and multiple governor initiatives for COVID-19. This support included the ramp up of the Staffing Shortage Fusion Center (vendor management/ selection, facility program tracking, training, budget analysis, outreach, etc.), the redesign of the UCC structure, coordination with community partners for the Library Mask Distribution program, consulted on the EOC strategic response plan, provided guidance and support on the COVID-19 FEMA reimbursement, revised finance packets for logistics, and developed templates, visuals, memos, and reports for the State Director of EM.

Grant Management Consultant, Thomas Howell Ferguson PA, CPA, March 2019 – May 2020

Ms. Supriana supported numerous declarations in the State of Florida including, Hurricane Irma, Hermine, Mathew, Michael, and Dorian, Florida Severe Storms, and Flooding (2014) and COVID-19. Ms. Supriana provided support to sub-recipients on reimbursements requests and closeout requests using Florida PA portal, EMMIE, and Grants Portal. This support included leading a team of 5 on the development of FEMA workbooks, Requests for Reimbursement packets, submitting Requests for Information's, Final Reconciliation Report/Final Inspection Reports, weekly and monthly state grant reporting, and quarterly reports to the state.

Intern, Osceola County Office of Emergency Management, July 2018 – August 2019

Ms. Supriana was an intern with the Osceola County Office of Emergency Management in Kissimmee, Florida. During her time supporting the Emergency Operation Center, she co-developed and facilitated a Cyberterrorism exercise, developed after action reports and improvement plans, and reviewed community health facility safety plans and assisted in community outreach.

Jeffrey Allen

SUBJECT MATTER EXPERT

EDUCATION

- Master of Science in Administration, Central Michigan University, Mount Pleasant, MI, 2006
- Bachelor of Arts in International Politics (Minor in National Security Studies, Distinguished Military Graduate), The Pennsylvania State University, State College, PA, 1993

CERTIFICATES OF COMPLETION

- Command and General Staff College, Ft. Leavenworth, KS, 2006 (Master's equivalent)
- University of Oklahoma, Resilience Development Institute, Oklahoma City, OK, 2015

AREAS OF EXPERTISE

- FEMA Public Assistance
- Healthcare facility financial recovery
- Program delivery
- Emergency Management
- Disaster preparedness
- Mitigation/Resiliency
- HSEEP compliant drills and exercises
- After Action Reports
- Grant applications

PROFILE

Mr. Allen has over 30 years of experience leading teams, developing new programs, and operating in crisis situations. He has served as a Program Delivery Manager for FEMA Region 3 and as the Emergency Preparedness Manager for the Penn State Hershey Medical Center and Penn State Health during the COVID-19 pandemic.

Previously, he served as the first Commonwealth Disaster Recovery Coordinator responsible for coordinating and synchronizing all disaster recovery operations across the Commonwealth of Pennsylvania. He also has 25 years of service in the US Army Infantry with extensive experience in leadership and training positions at all levels, specializing in operations and training.

RELEVANT EXPERIENCE

Deputy Director of Recovery, Tidal Basin Government Consulting, June 2022 – Present

As Deputy Director, Mr. Allen assists the Director of Recovery with the day-to-day management of the Business Unit. He also serves as an engagement manager for projects acting as an alternate point of contact for the client and supporting the Senior Project Manager, Project Manager, and project staff. He engages with clients and ensures that the assigned staff are meeting the needs of the client.

Program Delivery Manager, FEMA Region 3 March 2021 – June 2022

The Public Assistance (PA) Program Delivery Manager facilitates the PA application process, manages information collection, and provides customer service to PA grant recipients, applicants, pass-through entities, and subrecipients.

As the Program Delivery Manager, Mr. Allen assisted six applicants for DR-4602-VA Winter Storms with 26 projects totaling \$3 million. He also developed templates for FEMA Region 3 Disaster Operations Briefing and Applicant Briefing to be used by the Region for all disasters moving forward.

Mr. Allen completed 37 FEMA Independent Study (IS) and FEMA-internal courses and began the process of completing the requirement to earn the Certified Emergency Manager (CEM) with the International Association of Emergency Managers (IAEM).

Emergency Preparedness Manager, Penn State Hershey Medical Center and Penn State Health October 2018-June 2020

- + Responsible for the development, planning, implementation, coordination and management of the comprehensive emergency management program for the Penn State Milton S. Hershey Medical Center including the adult and children's Hospital, as well as the College of Medicine, and Physician's Medical Group Clinics. The Hershey Medical Center is a facility spanning over 560 acres with 23 buildings and 13,500 employees as well as innumerable patients and families on campus any given day.
- + In support of the COVID-19 pandemic, activated two Command Centers neither of which were in the organization's established Emergency Operations Plan, to include the physical layout, Information Services systems, daily schedule, and reporting requirements.
- + Served as Liaison in the Command Center to the township, county, state and healthcare coalition, and established reporting procedures that all of the above adopted to use with other hospitals and organizations.
- + Served as one of the lead planners and operational control for a Department of Homeland Security Mass Casualty full-scale exercise that involved dozens of actors, hundreds of participants as well as multiple local, state, and federal agencies.
- + Worked extensively with the Facilities team, especially the CADD team, to develop plans for co-hosting COVID-19 patients as well as shelter-in-place plans for all-hazards emergencies, understanding the unique challenges that medical facilities face.
- + Developed, implemented, educated, managed, and monitored a Hazard Vulnerability Analysis (HVA) and comprehensive Emergency Operations Plan (EOP) for the entire academic medical center campus.
- + Identified, developed, and implemented applicable comprehensive training and education programs for institutional stakeholders such as Administrators, Department Managers, Senior Management Team, Academic Chairs, Principal Investigators, and other employees on all-hazards emergency management principles that are consistent with the National Response Framework.
- + Served as the project lead for implementing PSH Alerts (Everbridge) which was the system-wide electronic alert and notification system that reached 15,000 employees. Wrote the Standard Operating Procedures. Created over 50 templates that are live and being used regularly.
- + Designed, facilitated and evaluated multiple Homeland Security Exercise and Evaluation Program (HSEEP) compliant drills and exercises (tabletop, functional and full scale) in accordance with Joint Commission standards. Planned an annual Clery exercise for the College of Medicine. Conducted and reviewed an annual exercise for each of the medical group clinics. Facilitated After Action Reviews with designated participants for process improvements and coordinate the planning and development of programs and exercises for highly infectious diseases, pandemic issues, and emerging special pathogens, i.e., Ebola, Zika Virus, etc.

- + Spearheaded Emergency Management of planned and unplanned events including operational readiness of the hospital command center, response, resource management and immediate recovery.
- + Greatly improved the Hospital Emergency Response Team (HERT) decontamination team program and ensured the program complied with applicable regulatory requirements. Ensured decontamination resources, personal protective equipment and other supplies were maintained, inspected, and cleaned. Recruited members to raise the number of volunteer members from 25 to over 100. Tirelessly worked to ensure the decontamination system was completely self-contained and rapidly deployable.
- + Researched and investigated emergency preparedness standards from the Joint Commission, CMS, and other regulatory agencies that impact the medical center, including the hospital, college of medicine, and medical group clinics. Implemented changes into planning documents.
- + Assisted in multiple fire and other hazard-based evacuation drills. Assisted Security Department in developing shelter-in-place policies and plans as they related to active shooter as well as other hazards.
- + Coordinated with and provided liaison to the community, county, state, and federal agencies involved with disaster response activities and sustained an Emergency Preparedness Cost Center over \$600,000. Oversaw grants and equipment related to Emergency Preparedness worth over \$2 million.

Commonwealth Disaster Recovery Coordinator (SDRC), PA Department of Community and Economic Development, Harrisburg, PA, May 2013 - January 2018

Mr. Allen created a Recovery Resources Team consisting of three full-time employees, as well as a Steering Committee comprised of the Lieutenant Governor and multiple Cabinet officials, six Recovery Support Functions, and over 500 government agencies, corporations, organizations, and nonprofits.

- + Synchronized disaster recovery efforts between the local level and state and federal agencies for hundreds of communities impacted by Hurricanes Irene and Lee.
- + Facilitated the communication of recovery priorities for all impacted communities and communicated statewide recovery priorities to the Federal Disaster Recovery Coordinator.
- + Coordinated state, federal, and other funding streams for recovery efforts among numerous recovering communities in excess of \$35 million.
- + Conducted numerous public speaking engagements at the venues such as the Pennsylvania Emergency Management Agency's annual conference (three times), the County Commissioner's Association of Pennsylvania annual conference (twice), the Pennsylvania State Association of Township Supervisors annual conference (twice), and the Pennsylvania Department of Health's annual conference, educating hundreds of elected officials and decision makers about disaster preparedness.
- + Drafted the first Commonwealth Disaster Recovery Plan, one of four FEMA-required state plans.
- + Led the Commonwealth team for the National Disaster Resiliency Competition worth nearly \$1 billion.

- + Lead proponent for Resiliency in the Commonwealth. Drafted the Resilient PA initiative and garnered the support of multiple state and federal agencies, local governments, non-profits, and non-governmental organizations.

Officer, US Army, Lt Colonel – Retired, FT Bragg, NC. 1993- 2012

Progressive leadership and staff positions as an Infantry Officer in airborne, air assault, light, and mechanized infantry units in the US and abroad, in leadership, training, operations, planning, and organizational effectiveness. Completed three tours of combat in Iraq including actions in the Battle of Fallujah, '04; the "Surge", '07; and the drawdown, '11. LTC Allen also had operational tours in Haiti and Afghanistan.

TRAINING

- + FEMA IS-100.b. (Introduction to Incident Command)
- + IS-120.c. (An Introduction to Exercises)
- + IS-200. b. (ICS for Single Resources and Initial Action Incidents)
- + IS-394. a. (Protecting Your Home or Small Business from Disaster)
- + IS-700. a. (National Incident Management System)
- + IS-800. (National Response Framework)
- + IS-2900 (National Disaster Recovery Framework)
- + E-0089. (National Disaster Recovery Framework: Leadership Workshop)
- + E-209 (State Recovery Planning and Coordination)
- + E-426. (Building a Roadmap to Resilience: A Whole Community Training)
- + AWR 160 (WMD/Terrorism Awareness for Emergency Responders)
- + Healthcare Leadership for Mass Casualty Incidents (HCL/ICE)
- + Incident Command: Capabilities, Planning and Response Actions for All Hazards (IC)
- + IS-01000 (Public Assistance Program and Eligibility)

Andrew Kemler

PUBLIC ASSISTANCE SPECIALIST

EDUCATION

- BS, Business Administration
Major in Finance, University of
Nebraska at Lincoln

AREAS OF EXPERTISE

- 428 Alternative Procedures
- Flood Recovery
- Mitigation Planning
- FEMA Public Assistance
- EHP Compliance

PROFESSIONAL HISTORY

Tidal Basin

Associate Project Manager
01/2022-Present

FEMA – Public Assistance Division

PA Program Delivery Manager
11/2019-01/2022

Flinn Paving Co.

Plant Manager and Estimator
05/2018-11/2019

PROFILE

Mr. Kemler's 4 years of program and project management experience includes supervisory roles that eventually led to his assignment as a FEMA Program Delivery Manager. During his time with FEMA, he worked closely with applicants to understand the damages that were incurred during the event and what the applicant needed from FEMA to not only return to pre-disaster conditions, but to mitigate facilities to provide additional resistance in the future. Mr. Kemler is currently serving Tidal Basin as an Associate Project Manager in the Public Assistance Division.

RELEVANT EXPERIENCE

Florida 4673-DR-FL, Hurricane, Flooding

Within one week of Hurricane Ian, Tidal Basin deployed Public Assistance consultants to assist the Town of Fort Myers Beach in their disaster recovery efforts. Mr. Kemler has worked closely with the town's department heads to provide policy and procedural guidance on the Public Assistance process. The Tidal Basin team trained staff on the requirements for documenting work performed by town staff, assisted in creating a framework for project document retention and performed reviews of their daily work logs.

Louisiana 4611-DR-LA, Hurricane, High Winds

Mr. Kemler worked with leadership from Young Audiences Charter Schools to provide Public Assistance guidance on the non-profits' recovery efforts from hurricane Ida. Mr. Kemler acted as a liaison between FEMA and the client in weekly meetings to ensure that FEMA's documentation needs were being met and that the PA process continued to move forward. In addition to liaison services, Mr. Kemler assisted the client by creating site inspection reports, verifying costs for damaged items, and providing insight on reimbursement expectation based on the client's insurance policies. Consulting services also included reviewing the client's contracts to ensure they followed the regulations outlines in 2 CFR and that the work completed was outlined in the contract.

Illinois 4489-DR-IL, COVID-19 Emergency Measures

Mr. Kemler worked closely with the representatives of the State of Illinois to assist with managing and organizing documentation that was required to secure funding through FEMA's Public Assistance and as well as CARES Act funding. In this role Mr. Kemler aided in the submission of over \$5 million for reimbursement of Category B emergency measures expenses that included contract labor, PPE, temporary medical facilities, and vaccination costs.

Nebraska 4616-DR-NE, Severe Storms, High Winds

Worked specifically with Nebraska's largest electrical provider to complete Preliminary Damage Assessments, Site Inspections and Project submission to secure over \$10 million in PA reimbursement following a statewide windstorm that left most of eastern Nebraska without power.

Nebraska 4420-DR-NE, Severe Storms, Flooding

As a FEMA Program Delivery Manager Mr. Kemler had his first FEMA deployment to Nebraska during the worst natural disaster the state had experienced in its history. He worked on a team that focused on specialized projects including waterways, utilities, powerplants and water treatment plants. During his time on this disaster Mr. Kemler guided his applicants on EHP compliance, PA policy and mitigation strategies. He assisted his applicants in recovering over \$150 million in obligated Public Assistance funds.

Moises Nova

PUBLIC ASSISTANCE SPECIALIST

EDUCATION

- BS Finance, Old Dominion University, Norfolk, VA

AREAS OF EXPERTISE

- FEMA Public Assistance
- Bilingual (Spanish)
- FEMA's Grants Portal
- Assisting Subrecipients
- QA/QC
- Account Reconciliation
- Financial Analysis
- Financial Report Writing
- Program Development
- Data analysis

CERTIFICATIONS

- FEMA IS-00100.c – Introduction to Incident Command System, ICS-100
- FEMA IS-00200.c – Basic Command System for Initial Response
- FEMA IS-01005 – Public Assistance Alternatives Procedures
- FEMA IS-00700.b – An Introduction to the National Incident Management System
- FEMA IS-00800.d – National Response Framework, An Introduction
- FEMA IS-01008 - Scope of Work Development (Scoping and Costing)

PROFILE

Mr. Nova is a detail-oriented emergency management specialist and associate project manager experienced in communications with applicants, operating procedures development, managing projects through completion, and accounting and compliance procedures related to federal grants. His skills include interpersonal communication, business optimization and workflow improvements. He has supported the states of Florida and Alaska with COVID-19 grant compliance.

RELEVANT EXPERIENCE

Tidal Basin Government Consulting, LLC, 2020 to Present, Associate Project Manager

Mr. Nova supports senior project managers for projects that cover a broad range of consulting services, including strategy development, program planning, auditing and evaluation, policy, and regulation development. He coordinates the efforts of subcontractors and may provide guidance and training to team members. Mr. Nova develops, implements, and monitors project scope, methodology, timelines, deliverable, and budgets, providing client with regular status updates and ensures project schedule is maintained. He also has:

- + Developed Standard Operating Procedures for project processes.
- + Assisted in completing the appropriate documentation required for federal grant funding.
- + Developed and tracked progress of new projects with applicants with key performance indicators.
- + Guided applicants through the Public Assistance process.
- + Oversaw applicant projects in FEMA's Grants Portal.
- + Performed Quarterly Reports for eligible projects.
- + Processed payments for obligated projects and advanced payments for Florida Division of Emergency Management Review and State of Alaska Division of Emergency Management.

- + Worked with team members on reporting weekly updates of project status.
- + Reported weekly updates to supervisors based on project progression.
- + Communicated with applicants to keep them updated on project status.
- + Developed Excel workbooks to generate reports using V-Lookups and Pivot Tables.

DR-4673-FL Hurricane Ian, Fort Myers Beach, Florida, Associate Project Manager for Fort Myers Beach, FL October 2022

- + Assisted with consulting the Town of Fort Myers Beach on eligible work because of Hurricane Ian.
- + Guided the client's various departments on the creation of a damage inventory.
- + Created spreadsheets to track costs to be included in projects within FEMA's Grants Portal, including tracking costs for expedited funding.
- + Reviewed daily 214s for all on-site personnel, including Fort Myers Beach employees as well as contractors.
- + Assisted with the creation of project folders to help organize and track files and documentation that will be required for eventual project submission and beyond.
- + Assisted with the creation of daily notes to be included in daily reports.

DR-4494-MI Michigan COVID-19 Pandemic, DR-4381-MI Michigan Severe Storms, Flooding, Landslides and Mudslides, DR-4547-MI Michigan Severe Storms and Flooding, DR-4607-MI Michigan Severe Storms, Flooding, and Tornadoes. State Public Assistance Officer, June 2021-October 2022

Mr. Nova served the State of Michigan as a Public Assistance Officer and was part of a team that simultaneously handled four different disasters for the state. His responsibilities included but were not limited to:

- + Reviewing invoices/proof of payment for project payment requests.
- + Performing Final recipient review for projects pending that step in FEMA's Grants Portal.
- + Assisting with guiding applicants through the PA process.
- + Communicating with applicant representatives for documentation acquisition.
- + Maintaining and updating folders for organization and record keeping of invoices and proof of payment provided by applicants.

DR-4533-AK Alaska COVID-19 Pandemic, Alaska, State Public Assistance Officer for Alaska, May 2021 – July 2021, October 2021-Present

Mr. Nova developed standard operating procedures for project processes, submitted quarterly reports, and assisted with written forms necessary to properly report all program and financial activities. He guided sub-recipients through the Public Assistance process and performed QA/QC reviews of project applications to ensure compliance with federal grant requirements. He also conducted informational meetings with sub-recipients and FEMA PDMGs. Performed funding request validations while reviewing labor, contracts, and materials summary for payment processing.

DR-4486 COVID-19 FEMA Disaster Response, Florida, Jr. Consultant, June 2020 – May 2021

As an Associate Project Manager, Mr. Nova guides sub-recipients through the Public Assistance process and performs reviews for project applications. His duties also include:

- + Reviewing submitted summary sheets for projects (Labor, materials, contracts).
- + Performing QA/QC review for project applications.
- + Conducting sub-recipient meetings.
- + Reviewing/completing quarterly reports for obligated projects.
- + Performed validation of requested funds.
- + Processing Payment Process for obligated projects.

Tina Hauk

ENVIRONMENTAL SPECIALIST

EDUCATION

- University: New Mexico State University, Las Cruces, NM 88001, Double Degree: BA, Anthropology; Bachelor of Business Administration and Economics in Human Resource Management – with Honors
- Graduate Studies in Anthropology
- API – Introduction to Claims

AREAS OF EXPERTISE

- Environmental Review
- HUD Programs: HOME; CDBG; CDBG-DR
- Contract Management
- Archaeological Experience

CERTIFICATIONS & TRAINING

- Chairman of the Board, Capitol Area Alliance for the Homeless, 2008, 2009
- Certified HOME Specialist: Regulations 2007
- Environmental Review Training, 2003, 2005, 2007
- New Mexico Real Estate Associate Brokers License, 2004
- HOME Training 2002, 2003, 2004, and 2005 – CDBG Training 2005 and 2006
- Advanced Toastmaster-Bronze – Toastmaster Competent Leader Designation

PROFILE

Ms. Hauk has over 30 years of Environmental Review experience, inclusive of ensuring compliance with NEPA and Section 106 of NHPA. She has experience in training and technical assistance, HUD programs including HOME, CDBG and CDBG-DR, and contract and grant management. She has additional experience with HOPWA, HUD Environmental Review, Davis Beacon and the Related Acts, URA, DOE WAP, HUD Consolidation Plan, Action Plan, and CAPER. Ms. Hauk has provided archaeological experience in New Mexico, West Texas, and Eastern Arizona, specializing in historic architecture, debris field identification and analysis and historic artifact analysis. She has consistently demonstrated her ability to structure and restructure work groups to maximize productivity and reduce turnover, while providing support to her teams.

RELEVANT EXPERIENCE

Grants Management Specialist, Innovative Emergency Management, November 2021 – April 2022

- + Provided critical analysis of applications for funding for the Nevada American Rescue Plan Act (ARPA) allocation applications.
- + Provided eligibility analysis for applications to the Nevada ARPA allocation.
- + Conducted research on other funding sources for the State of Nevada other than ARPA.
- + Wrote progress reports on work performed including analysis of prior events for the Nevada State Governor's Office.
- + Assisted team members with assignments when needed.

Project Manager, Tidal Basin Government Consulting, December 2019 – November 2021 Valley Children's Hospital

- + Provided technical expertise on FEMA PA process as it relates to the COVID-19 Pandemic Disaster in California.
- + Input and monitored projects into FEMA Grants Manager.

- + Provided technical expertise on eligibility of labor, equipment, and materials for client.
- + Responded and provided recommendations to client on responses to RFI's in Grants Manager.

State of Illinois

- + Provided technical expertise on FEMA PA process and application as it relates to the COVID-19 Pandemic Disaster.
- + Provided support for FEMA reports on COVID-19 vaccinations, dollars spent, location of vaccination sites, steps needed for improvement in the distribution of the vaccine.
- + Made recommendations

Norman Public Schools

- + Provided technical expertise on FEMA PA process and application as it relates to the COVID-19 Pandemic Disaster for Schools (K-12).
- + Monitored projects in Grants Manager on behalf of client.
- + Made recommendations for different funding sources (ARPA, CARES, and FEMA PA) based on eligibility of specific costs.
- + Assisted with client damage claim through FEMA PA process (reviewed application, eligibility review, etc.)

City of Gulf Breeze

- + Provided technical expertise on FEMA PA process for damage sustained during Hurricane Sally.
- + Provided technical expertise on FEMA environmental eligibility and NEPA process for Hurricane Sally damage.
- + Provided eligibility review of damage assessments, participated in FEMA weekly calls and Grants Management issues.

Environmental Historic Preservation (EHP) Lead, Tidal Basin Caribe, December 2019 – Present EHP Lead on Hurricane Maria and 2019 Earthquakes in Puerto Rico

- + Provided technical expertise on FEMA environmental requirements to Puerto Rico Electric Power Authority (PREPA) on environmental issues stemming from Hurricane Maria and the 2019 earthquakes.
- + Advised and assisted client with NEPA process for emergency projects, FEMA 404 and 428 projects
- + Ensured compliance with NEPA, Wetlands Protection Act, National Historic Protection Act, sole source aquifers, Safe Water Drinking Act, Coastal Zone Management Act, Coastal Barrier Resources Act, Floodplain Management and the US Water Resources Council Guidelines, Endangered Species Act, Fish and Wildlife Coordination Act, Solid Waste Disposal Act, Federal Water Pollution Control Act, Farmland Protection Policy Act.
- + Assisted client with required consultations with Corps of Engineers and in completing permits.
- + Served as liaison between client and federal entities involved with EHP (FEMA, SHPO, USFWS, COE, etc.).

- + Site visits as needed to explain EHP concerns and steps forward.

Principal, Powell Consulting, December 2017 – December 2019

Environmental Review Subject Matter Expert (through Hagerty Consulting)

- + Consulted with Hagerty upper management and Santa Rosa County officials on HUD Part 58 Environmental Review process.
- + Compared California Environmental Review process with HUD Part 58 for similarities and differences, made recommendations on how and where to save time on process.
- + Drafted memo for Hagerty upper management on recommendations.

FEMA Public Assistance (PA) Technical Writer (through Hagerty Consulting)

- + Public Assistance Correspondence writer for FEMA Hurricanes Irma and Maria in the US Virgin Islands.
- + Developed and created technical documents (i.e., process, procedure, memos, talking points, letters) for Field Command Officer to use for legislative inquiries, stakeholder audiences, and internal management and staff.
- + Provided technical assistance for PA Admin staff as needed.

FEMA Subject Matter Expert (through Hagerty Consulting)

- + Environmental Specialist and Historic Preservation Specialist specialized knowledge used to create documents for FEMA.

Environmental Review Expert for City of Longmont, Colorado (through Hagerty Consulting)

- + Reviewed all environmental review special studies documents for submission to the State of Colorado for clearance and release of funds.
- + Analyzed data in special studies (biology, floodplain, waterway, infrastructure engineering, archaeological etc.) as they relate to CDBG-DR projects.
- + Conducted site visits to affected areas as needed to gather information and complete reviews.
- + Provided support for City of Longmont staff during environmental review process to obtain release of funds from the State of Colorado.
- + Reviewed documents to ensure compliance with NEPA, Wetlands Protection Act, National Historic Protection Act, sole source aquifers, Safe Water Drinking Act, Coastal Zone Management Act, Coastal Barrier Resources Act, Floodplain Management and the US Water Resources Council Guidelines, Endangered Species Act, Fish and Wildlife Coordination Act, Solid Waste Disposal Act, Federal Water Pollution Control Act, Farmland Protection Policy Act, and HUD regulations (24 CFR Part 51) relating to noise.

CDBG Compliance Specialist and Grant Manager, Office of Community Development, Disaster Recovery Unit, February 2011 – December 2021

- + Lead Compliance Specialist for CDBG Programs for Hurricanes Katrina/Rita, Gustav/Ike, Isaac and the great flood of 2016.

- + Coordinate review teams for monitoring visits.
- + Wrote monitoring letters and non-compliance letters.
- + Provided technical assistance on programs, guidelines and regulations as needed by grantees.
- + Approved and reviewed invoices for programs listed above.
- + Reviewed contracts and Cooperative Endeavor Agreements for compliance with state, federal and program rules and regulations, specifically disaster related regulations.
- + Provided input on compliance policy as needed by Director of Compliance, Monitoring and Audit.
- + Reviewed and process Part 58 environmental reviews for Hurricanes Katrina/Rita, Gustav/Ike, Isaac and the great flood of 2016.
- + Project/Grant Manager for three programs: Department of Agriculture, Tourism, and Board of Regents.
- + Provided technical assistance on programs, guidelines and regulations as needed by grantees.
- + Close out of three programs, Department of Agriculture, Tourism and Board of Regents.
- + Coordinated review teams for monitoring visits.

Director of Programs, Louisiana Housing Finance Agency, April 2007 – February 2011

- + Oversight of 3 departments: HOME, Compliance and Energy Assistance.
- + Developed, maintained and grew relationships with federal and state funders: HUD, DOE, DHHS, etc.
- + Developed and oversaw annual budget in excess of \$2,000,000.
- + Generated \$38,000,000 in program funds.
- + Advised President on improvements to National Housing Policy, specifically in disaster areas.
- + Supervised staff of 30, including 3 managers and 2 supervisors.
- + Eliminated staff turn-over.
- + Oversaw the training and development of nationally certified experts in housing.
- + Reduced backlog of projects by 33%.
- + Reduced processing time for environmental reviews from 2.5 years to 6 weeks.
- + Implemented and conducted quarterly focus group meetings with constituents.
- + Developed and implemented organization wide documentation of processes and procedures
- + Improved overall organizational efficiency by 33%.
- + Conducted training as needed.

Field Environmental Review Officer (New Mexico and Louisiana), U.S. Department of Housing and Urban Development, October 2006 – April 2007

- + Established Environmental Review Office in New Orleans Post-Katrina.

- + Ensured compliance with NEPA, Wetlands Protection Act, National Historic Protection Act, sole source aquifers, Safe Water Drinking Act, Coastal Zone Management Act, Coastal Barrier Resources Act, Floodplain Management and the US Water Resources Council Guidelines, Endangered Species Act, Fish and Wildlife Coordination Act, Solid Waste Disposal Act, Federal Water Pollution Control Act, Farmland Protection Policy Act, and HUD regulations (24 CFR Part 51) relating to noise.
- + Liaison between state and local housing officials and national housing officials.
- + Represented Agency in environmental issues related to both New Mexico and Louisiana.
- + Coordinated Agency rebuilding efforts between national disaster recovery and environmental housing issues.
- + Interfaced with federal, state and local leaders on housing issues (EPA, DOE, COE, FEMA, ACHP, etc.).
- + Implemented national environmental housing policy.
- + Provided training and technical assistance to federal, state and local housing providers on environmental law and policy, including HUD staff.
- + Provided expert feedback on compliance of state environmental housing policy with federal environmental policy.
- + Provided expert comments on Environmental Impact Statements for agency.
- + Conducted and performed environmental reviews.
- + Monitored HUD funded agencies for compliance with environmental law and HUD policy.

State Environmental Review Officer/Program Specialist (including Grant Management), New Mexico Mortgage Finance Authority, April 2002 – October 2006

- + Represented the state housing finance agency in all matters (including federal court) regarding environmental review requirements under 24 CFR Part 58.
- + Redesigned and implemented environmental review procedures and policies for State of New Mexico housing programs, including HOME, CDBG, Risk Share, etc.
- + Served on implementation committee for State CDBG (administered by Department of Finance and Administration) Environmental Review Procedures.
- + Ensured compliance with NEPA, Wetlands Protection Act, National Historic Protection Act, sole source aquifers, Safe Water Drinking Act, Coastal Zone Management Act, Coastal Barrier Resources Act, Floodplain Management and the US Water Resources Council Guidelines, Endangered Species Act, Fish and Wildlife Coordination Act, Solid Waste Disposal Act, Federal Water Pollution Control Act, Farmland Protection Policy Act, and HUD regulations (24 CFR Part 51) relating to noise.
- + Routinely reviewed Phase 1 site assessments for compliance with federal and state requirements.
- + Routinely reviewed noise assessments for federal and state compliance.
- + Developed and designed Environmental Review web page.
- + Trained sub-grantee and MFA support staff in Environmental procedures.
- + Trained compliance staff in monitoring requirements for environmental review standards on HOME,

CDBG, and Risk Share.

- + Conducted more than 100 trainings, public hearings, and presentations to a variety of audiences from Legislators, Executive Directors, Support Staff and general public.
- + Oversaw and administered housing programs for HUD, USDA, and DOE.
- + Developed and implemented policies concerning procurement for services via request for proposals and request for qualifications.
- + Managed DOE Weatherization Assistance Program.
- + Grew State Weatherization Assistance Program from \$1.7 million to \$4.2 million in two years.
- + Monitored housing programs for compliance with Federal, State, and Programmatic rules.
- + Applied for and was awarded 90% of grant applications, grossing upwards of an additional \$10,000,000 in additional housing dollars for the state of New Mexico.
- + Developed and grew relationships with various stakeholders including federal and state regulators, non-profit organizations, and general public.
- + Developed and implemented policies and procedures for contract administration, training and technical assistance, and programmatic evaluations.
- + Project manager for the development of the State of New Mexico 2006-2010 HUD Consolidated Plan.
- + Wrote State of New Mexico HUD Action Plans, 2004, 2005, 2006, 2007 and currently 2008.
- + Advised MFA and State officials on federal and state requirements related to programmatic implications for implementation.

5. Approach and Methodology

Project Formulation

The Tidal Basin team has the unique advantage of having supported disaster recovery operations from virtually every type of declared event, including hurricanes, typhoons, tornadoes, floods, fires, earthquakes, volcanic eruptions, terrorism, and pandemics. Tidal Basin will use our decades of experience managing complex events to support the Town of Fort Myers Beach's unique disaster recovery needs. Our team will work with the Town, FEMA and FDEM and implement a process for managing disaster recovery from project inception to closeout including the following:

Tidal Basin's Director of Recovery, formerly a FEMA Public Assistance Group Supervisor, was instrumental in the development and deployment of FEMA's Grants Portal and Grants Manager systems and assisted in the design and implementation of FEMA's new Public Assistance Delivery Model.

- + Collaborate with the Town's Government Relations staff and others, as needed, on project formulation of Damage Description and Dimension assessments (DDD), information gathering, Scopes of Work (SOW), project development, back up documentation, and preparation for each project worksheet (PW). Such is to include other project submittals to FDOH, FDOT, FDEM, FEMA and/or any other applicable entities and will adhere to the standardized format proven to comply with FEMA's requirements while maximizing recovery opportunity.
- + Work with FEMA to formulate PWs in the most advantageous, streamlined, organized manner that aligns with the internal priorities of the Town of Fort Myers Beach. The team will provide guidance to the Town and will focus on maximizing reimbursement for the repair/replacement of critical infrastructure losses.
- + Attend all meetings with FEMA, state and insurance representatives and will participate regularly with the Town's designated workgroup. The team, as required, will attend either in-person and/or virtually.
- + Develop and implement a comprehensive Recovery Strategy that allows the team to identify and communicate risks within the Town's operation that could preclude its ability to optimize reimbursement.
- + Assist the Town in establishing pragmatic document control organized by PW and preserved for easy access for appeals, closeout, and audit. The team will also assist the Town with the establishment of a file retention system and data management process that ensures disaster records are complete and ready for audit.
- + Develop and execute processes for the Town of Fort Myers Beach that allows the team to assist in the preparation and submission of the disaster recovery program. These implemented processes will be inclusive of documentation, procurement, contracts, payroll, and grant submission support.

- + Develop and execute processes for obtaining, analyzing, and gathering field documentation. Processes will include, however are not limited to, records related to procured goods and services, timekeeping, and force account labor.
- + Provide overall Grants Management services relating to all FEMA Project Worksheets, including the management of FDEM and FEMA's Grants Portals, thereby ensuring compliance with applicable policies, regulations, and laws, as well as documentation requirements.
- + Evaluate opportunities and develop alternate and/or improved project requests for FEMA and/or other Federal or State Grants; all necessary documentation and policy justification to support approval will be provided.
- + Develop and implement policies and procedures for the FEMA Grants Portal system to ensure consistency and thoroughness for all of the Town's PWs.
- + Develop PW collateral and assist in the preparation of accurate PA emergency and permanent work project estimates, including but not limited to Cost Estimating, development of detailed Damage Descriptions and Dimensions, Scope of Work, Force Account Labor, Force Account Equipment, and Rental Equipment Summary Reports, Material Summary Reports, Contracts and the aggregation and summarization of all associated supporting documentation.
- + Formulate projects in such a way that potential eligibility issues, environmental or historic preservation concerns, or complicated insurance coverage issues are considered separately to expedite funding and address complex projects individually.
- + Review each PW against actual site conditions to ensure that all damage details are captured thoroughly and that the Scopes of Work align with the goals of the Town. The team will coordinate and interface with the Town's technical point of contact to inform the effort for repair and/or construction of damaged facilities and infrastructure that will comply with FEMA eligibility and cost reasonableness determinations. Additionally, we will aid in the oversight of repair and construction efforts to ensure work complies with applicable Project Worksheets and related FEMA Public Assistance grant requirements and guidelines.
- + As detailed further below, develop all 406 Hazard Mitigation Proposals for PA PWs in alignment with the Public Assistance Program Policy Guide (PAPPG) Appendix J and the Benefit Cost Analysis (BCA).
- + Assist in the development of detailed cost estimates for in-kind repair and replacement projects as well as estimates for improved projects, hazard mitigation proposals, codes and standards upgrades

"In total, Tidal Basin efficiently and effectively managed over \$10 million in Public Assistance grant funding, including over \$100K in 406 Hazard Mitigation Program Measures, to harden City facilities and mitigate against future damage.

I strongly recommend the services of Tidal Basin. They are professional, thoughtful, and extremely knowledgeable. They handled the City's financial recovery flawlessly which minimized disruptions to the City's staff, allowing them to keep focus on their daily responsibilities."

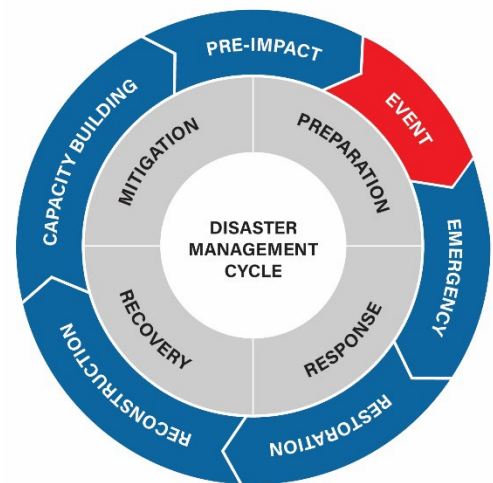
*-Mark Finigan, Former Finance Director,
City of Key West, Florida*

and least-cost alternatives to support PW development. Cost estimates will also serve as the basis for 50 Percent Calculations used to determine if a facility should be repaired or replaced, and to aid FEMA in the review and obligation process.

- + Coordinate with the Town's finance and accounting departments to ensure disaster-related expenses are categorized and tracked to support thorough cost capture and expeditious data recall to support PW development.
- + Review the Town's Property Insurance, as well as past disaster FEMA Obtain and Maintain insurance requirements, and work with the Risk Management Department to understand the insurance impact on PWs, allowing Tidal Basin to make recommendations on how to best pursue FEMA reimbursement.

Public Assistance Eligibility

The cornerstone of any successful disaster recovery hinges on a thorough understanding of grant program eligibility. Tidal Basin has decades of experience managing disasters of all kinds and advising clients on opportunities to take advantage of eligibility rules to maximize recovery and speed rebuilding following disaster events. We will:



- + Develop PWs that comply with FEMA's eligibility requirements while maximizing opportunities for reimbursement for hazard mitigation, codes and standards, environmental compliance, and other opportunities.
- + Review all PWs for eligibility issues and work to develop justifications based on policy, regulation, and past precedent to represent the Town's best interest to FEMA and FDEM.
- + Review contracts and contractor invoicing to ensure compliance with grant program requirements and local, state, and Federal laws, regulations, and policies.
- + Attend meetings with FDEM and FEMA to discuss and negotiate complex eligibility issues to represent best interests and to foster a collaborative environment among coordinating agencies.
- + Assist if FEMA or FDEM challenges recovery goals, supporting the position with precedent, policy and regulation using seasoned arbitrators and appeals experts.
- + Ensure the Town's disaster recovery and restoration processes comply with laws, regulations, and guidelines to maximize reimbursement for eligible disaster expenditures and to minimize timing for reimbursement.
- + Advise on procurement requirements set forth in 2 CFR (Code of Federal Regulations) Part 200, as well as local laws, regulations, and guidelines to avoid disallowance and negative audit findings. This includes, but is not limited to the following:
 - Providing recommendations for improvement/augmentation of existing procurement policies and practices.

- Contract and invoice review to ensure that contractors' invoices are compliant with and eligible for grant program requirements.
- Ensuring alignment of Scopes of Work with bid packages to preserve and maximize recovery.

Grants Management and Correspondence

Grants Management, coupled with an elevated level of expertise in project formulation and eligibility, ensures that grant conditions are met and maintained for compliance and to avoid disallowance. This requires continuous, meticulous monitoring, timely correspondence, deep knowledge of statutory timelines, and expertise in grant program compliance. To support the Town, Tidal Basin will provide the following:

- + Draft correspondence and assist with submissions to FEMA, FDEM and other agencies associated with recovery, including Time Extension Requests, first and second Appeals, Scope Change Requests, Amendment Requests, Closeout Requests, and any Audit Responses, as necessary.
- + Complete all Quarterly Progress Reports (QPRs) as required by FDEM and FEMA.
- + Design and implement a process with documented procedures outlining a standardized method of data collection to support expeditious Requests for Reimbursement (RFRs) and Requests for Advance (RFAs).
- + Support the Town with the implementation of cost tracking procedures and protocols to ensure ongoing compliance with federal requirements and thorough reimbursement. This includes implementation of cost tracking procedures for interval review and reconciliation of actual project spending thereby ensuring all eligible project costs are accurately captured.
- + Develop and implement document management protocols for audit ready files, track and document projects with Town personnel to assure the pass-thru of knowledge and next steps.
- + Provide detailed reports on closeout status, Time Extensions, Appeals, Audits, DOB (Duplication of Benefits) findings and projected programmatic closure date.
- + Handle Requests for Information (RFI) issued electronically in FEMA's Grants Portal system including:
 - Tracking and responding to all FEMA RFIs (Requests for Information) in a manner that complies with FEMA's programmatic timelines.
 - Formulating RFI responses that satisfy FEMA's information requirements necessary to process and obligate PWs in the most expeditious manner possible by providing thorough documentation supported by policy and regulation.
- + Perform services in accordance with timeframes and dates mutually agreed upon between Tidal Basin, The Town, FDEM, FEMA and/or any other agency included in the process, strategy or otherwise.

Section 406 Hazard Mitigation

Tidal Basin understands the value of implementing effective, cost-efficient Hazard Mitigation measures into FEMA funded projects. As FEMA states, every one dollar spent on Hazard Mitigation saves six dollars in future losses. It is for this reason that inclusion of Section 406 Hazard Mitigation proposals is a cornerstone to all Tidal Basin's Public Assistance consulting engagements. With the goal of continuously increasing the resilience of the Town's infrastructure, the Tidal Basin team will meticulously analyze all projects for opportunities to incorporate mitigation measures that comply with FEMA's eligibility criteria, maximize recovery opportunity, and protect facilities against future losses. This includes, but is not limited to the following:

Section 406 Hazard Mitigation Measures are considered cost-effective if they meet one of the following three criteria:

- *Within 15% of project cost*
- *Found on Appendix J of PAPPG*
- *A BCA of 1% or greater*

- + Tidal Basin will assist in development of Section 406 Hazard Mitigation Proposals (HMP) for projects in alignment with the Public Assistance Program Policy Guide (PAPPG) Appendix J and the Benefit Cost Analysis (BCA).
- + Our team will analyze all of the Town's projects for immediate opportunities for mitigation included in Appendix J, which outlines pre-approved mitigation measures which can be funded up to 100% of project costs without the need for a BCA.
 - Pre-approved cost-effective mitigation measures included in FEMA's PAPPG Appendix J include items such as:
 - Increasing draining structure sizes
 - Sump pumps
 - Elevation of equipment above BFE (Base Flood Elevation)
 - Anchoring storage tanks
 - Dry floodproofing
 - Securing walls to roofs using connectors or hurricane clips
- + Tidal Basin's mitigation experts will analyze mitigation opportunities with budget concerns in mind, understanding that added project costs come with additional local cost share unless funded at 100% Federal cost share.
- + Based upon the budgetary analysis, our team will make recommendations as to the most advantageous opportunities for mitigation projects that also maximize resiliency.
- + Tidal Basin Mitigation experts will collaborate with the team of PA experts to ensure baseline FEMA projects include maximized funding opportunity under eligibility rules, which translates to a higher level of available mitigation funding on a project-by-project basis.
- + We will develop HMPs (Hazard Mitigation Proposals) including all FEMA required information

including Cost Estimate, 15% Calculation, all necessary regulatory, permitting and compliance information, thorough and detailed HMP Scope of Work, and perform a Benefit-Cost-Analysis for those projects that exceed 15% and are not included on Appendix J.

- + Using FEMA approved methodologies, including the BCA toolkit, Tidal Basin will conduct the Benefit-Cost Analysis to determine the overall Benefit-Cost Ratio (BCR) to support the Town's mitigation objectives for PA funded projects.

Award Closeout

Tidal Basin offers industry proven grant closeout support. The Tidal Basin team will work to facilitate the prompt and full reconciliation of all subawards, meeting or exceeding the stipulations contained within all applicable federal regulations. Our team's effective project management and rigorous monitoring from project implementation onward will streamline closeout of the award. Closeout support efforts may include additional training sessions and template distribution to prepare to close out projects; conducting final site inspections; gathering all compliance documentation; and generating the closeout package to include drafting the Town's closeout request to FDEM and FEMA, and other federal agencies including all required supporting documentation. Tidal Basin will support closeout efforts through the following:

Upon final PW drawdown, Tidal Basin will assist in initiating closeout procedures:

- + Complete the FEMA Project Completion and Certification report (P.4) and initiate closeout requests.
- + Formulate and support large project closeouts final actual eligible costs, including preparation of PW amendments to reconcile funding and Scopes of Work as necessary.
- + Request Net Small Project Overruns (NSPO) as necessary, supporting cost overruns with detailed cost documentation for final reconciliation.
- + Formulate and support Small Project Closeouts with verification of completion within the period of performance.
- + Assist in the development of Final Inspection Reports.

Determination Memos and Appeals

In the event FEMA makes a negative eligibility determination or takes issue with the Town's recovery goals, Tidal Basin will advocate on behalf of the Town to ensure best interests are represented to FEMA. On behalf of the Town of Fort Myers Beach, we will:

- + Utilize precedent-setting appeals and policy decisions to outline and justify complex eligibility issues in a manner that maximizes opportunity.
- + Direct FEMA to provide Determination Memos in accordance with protocol, which memorialize FEMA's determination and outlines the policy or regulation used in making the decision, if FEMA makes a negative eligibility decision.
- + Review FEMA's Determination Memos and make recommendations as to whether the decision warrants an appeal.
- + Should the Town desire to appeal a FEMA Determination, develop a letter of appeal, aggregate the

required documentation to support the appeal, justify the position with past precedent, and submit the appeal package to the recipient and FEMA within the statutory timelines.

- + Respond to RFIs by the recipient and/or FEMA in response to any appeals.

Audits

Any federal grant program administered is subject to audit from both state and federal agencies. Tidal Basin works proactively to support audit reviews from the Preliminary Damage Assessment (PDA) through project closeout. Our standard approach when creating project files ensures that each project is completely documented as if being audited from the start of the disaster. In the event of an audit by the Office of the Inspector General (OIG), the Tidal Basin team will work directly with the OIG representative to provide the information and documentation that is required to avoid negative audit findings.

Developing Long Term Community Recovery Plans

Long term community recovery (LTCR) planning is a compressed, intensive process that will guide recovery and maintain community involvement. Tidal Basin will:

- + Establish the plan leadership team, including a project manager and key agency representatives, develop a milestone schedule for deliverables, including quality control, and set a schedule of regular leadership meetings.
- + Develop a LTCR plan outreach program to engage the community (prioritizing underserved populations including communities of color, elderly, youth, disabled, and low income), public agencies, private sector, and non-profits.
- + Assess impacted resources, structures, populations, etc. including housing, infrastructure, environment, and the economy to determine focus areas for the LTCR plan.
- + Review and synthesize existing plans and studies. Given our breadth of local experience, we are very familiar with existing plans for Lee County including comprehensive, transportation, housing, and economic development plans.
- + Identify and delineate community needs including diverse housing types, infrastructure, natural areas, parks and recreation facilities, community centers, and economic and community development. Establish goals and metrics for each focus area.
- + Identify infrastructure investments that mitigate risk, promote resilience, and support recovery and quality of life.
- + Identify policies that promote the shared vision and goals of the LTCR plan.
- + Evaluate and prioritize projects, policies, and other strategies based on community input, resilience, and performance measures including equity and sustainability.
- + Develop an action plan, including funding sources, responsible champions and lead agencies, outreach and education strategies, monitoring and reporting, and implementation timelines to achieve LTCR.
- + Incorporate projects, policies, and strategies into applicable Comprehensive, Transportation, Housing, and other plans and funding programs.

Experienced Staff to Support/Augment Local Disaster Recovery Manager (LDRM)

Our existing relationships and experiences with county and Town staff, public agencies, local major employers and small businesses, nonprofits and service providers, and community groups, make us well positioned to support the LDRM quickly and effectively as required. Support for the LDRM will follow the action plan developed for the LTCR plan. The team will focus first on high priority, high impact, visible projects to ensure continued community support and awareness. Implementation may require grant applications and management, local policy change, personal business investments, and community action. It will certainly require coordination across sectors, accountability from all partners, and flexibility as opportunities and challenges arise.

Final Closeout

The Tidal Basin team will work to facilitate the prompt and full reconciliation of all sub-awards; meeting or exceeding the stipulations contained within FEMA's HMA Closeout Toolkit. Effective project management and monitoring as the project was implemented will streamline closeout of each project. Closeout support may include conducting final site inspections, gathering required EHP, NFIP, and permitting compliance documentation, and generating the close out package to include drafting subaward closeout requests to FDEM and all required supporting documentation.

6. Management Plan

Tidal Basin recognizes that a disaster recovery consulting engagement has a beginning, a middle, and an end. Throughout this entire linear process, however, is the need for constant evaluation of dynamics that affect the engagement. New information, changes, opportunities, and concerns are common events that drive the need to adjust and adapt. To deal with this changing environment and the unique needs of the Town, Tidal Basin will rely on a Continuous Evaluation Cycle to manage our engagement. Tidal Basin's consultants apply a cyclical thought process that continuously reevaluates the effectiveness of progress and achievements of the engagement, and then adapt new strategies if needed. As the linear steps of the engagement proceed, continuous reevaluation helps to ensure effective attainment of goals and objectives. On a weekly basis, the Project Manager (PM) is responsible for the Continuous Evaluation Cycle and reports any deficiencies or the need to adjust the engagement strategy to meet the Town's objectives to the Engagement Manager. To support this effort, Tidal Basin will:



- + Design a targeted, time-proven Recovery Plan that defines the Town's disaster recovery objectives, strategies for achieving those objectives and tactics for carrying out the operation.
- + Defined roles and responsibilities and a clear sense of the Town's goals and how each team member fits into the larger mission.
- + Anticipate problems, providing contingencies for the Town's vulnerabilities and continuously evaluating the engagement for effectiveness and appropriateness with a clearly defined course of action to update the plan on regular intervals if necessary.
- + Defining clear milestones to ensure the project is on-course, within budget, and aligned with the Town's recovery goals while making appropriate course corrections along the way.
- + Clearly defined deliverables and taskings so that each team member has clear expectations to support the Town's objectives.
- + Prepare weekly summary reports of progress toward the Town's goals and any issues that may require operational changes.
- + Attend all planning and progress update meetings, including hosting and providing presentations as requested by the Town.

Schedule

The FEMA Public Assistance Program has strict statutory deadline dates based on the Category of Work a Project Worksheet is written against. Tidal Basin's Project Manager shall develop a detailed Project Worksheet Tracking Workbook, which shall include a descriptive timeline for each Project Worksheet obligated. This timeline shall track the deadline date for Category A and Category B Projects (Debris Removal and Emergency Protective Measures respectively), plus Category C through Category G Projects (Permanent Work), as applicable.

Client Communications

Tidal Basin's Project Manager will be the primary point of contact between the Tidal Basin team and the Town and will be responsible for keeping all parties up to date on project status on an ongoing basis. The Town may communicate freely with other Tidal Basin assigned staff as necessary for efficiency of routine processing of projects, but the PM should be kept apprised when necessary. The team will provide the Town with a weekly status report detailing project activities, progress towards project goals and deadlines, and other required data. The PM will schedule a weekly status meeting with the Town to discuss project progress, and any other necessary topics. The weekly report will be available at this meeting for discussion. Additional reporting and meetings will be scheduled as necessary and requested.

Either the PM, the Engagement Manager, or other designee will be available during regular business hours via phone, or email and to respond to requests from the Town.

Management Team Responsibilities

The Tidal Basin team's key and support staff will utilize their expertise to ensure project success. Roles and responsibilities shall be defined with a clear sense of the Town's goals and how each member of the management team fits into the mission. The responsibility matrix clearly defines the accountability of the management team, and the project organization chart describes the organization of the project team as well as the lines of authority and communication.

Logistics

Resources deployed to this effort will be equipped with contractor issued and owned hardware prior to joining the contract. Such hardware will include laptops (PCs) and other equipment deemed necessary to support the program. The Tidal Basin Team already has in inventory enough laptops for the number of staff necessary to perform this engagement.

The Town shall request FDEM provide the FLPA.org system and FEMA provide Portal access for the submission and processing of applications by the assigned Tidal Basin Team. Tidal Basin will directly access applications through secure connections directly from the contractor owned and issued PCs.

The Tidal Basin team will provide necessary software required for this contract. Sufficient licenses are already owned to perform the contract. Such software includes MS Office and collaboration software (e.g., TEAMS or SharePoint).

Staffing

Tidal Basin will provide a Public Assistance Consulting team of sufficient size and with sufficient training to assist the Town with their financial recovery from Federally Declared Disasters. With a bench of over 2,000 resources, and a stellar recruiting team which is accustomed to hiring and onboarding hundreds of local and remote staff to stand up recovery programs quickly, the Team can staff the initial project requirements as well as any necessary surges. Tidal Basin maintains an office in Lake Mary, FL, and has developed a well-trusted and effective remote working ethic that has been in-place for over one year. Tidal Basin has staff that has been working remotely for clients for over three-years now, to their complete satisfaction.

7. Demonstrated Understanding of the Project

The Tidal Basin team is currently engaged with various departments across the Town of Fort Myers Beach, inclusive of the Finance department. Our team provided Town department heads with training on FEMA documentation requirements along with helping to develop an approach to track costs and assist in capturing and summarizing eligible costs. Cost documentation and integrity audits were also performed to identify areas that may jeopardize funding.

Town employees have spent numerous hours with the Tidal Basin team to understand how the FEMA PA process works, while our team took time to understand each department's priorities to recover from Hurricane Ian and return to normal operations. By understanding the Town's priorities, our team is cognizant of where to initially concentrate our efforts and make sure that those projects are selected first.

To date, the Tidal Basin team have experienced success with the following:

- + Fully executed Sub-Grant Agreement between the Town and FDEM.
- + Submitted Town Request for Public Assistance.
- + Completed Applicant Impact Survey in Grants Portal.
- + Completed Risk Assessment Questionnaire in FloridaPA.com.
- + Submission of request to FDEM/FEMA for private property and commercial property debris removal (PPDR & CPDR).
- + Reviewed current existing vendor contracts to ensure 2 CFR compliance.
- + Working closely with FMB staff and FEMA/FDEM EHP representatives on permitting for temporary beach berm to ensure all federal/state environmental concerns are addressed and funding not jeopardized.
- + Processed costs-to-date and future estimates to provide costs for Category A & B Expedited PW's so the Town can receive 50% of the total cost estimates in an accelerated time frame.

To begin the process of recovery from Hurricane Ian, Town leadership is motivated to bring residents, businesses, and ultimately visitors back to Fort Myers Beach. The Town developed a prioritized list of projects which includes restoring the beaches, rebuilding the town hall, the preservation and repair of historical sites, private and commercial property debris removal, and the removal of debris to restore waterways. Our team is already on-site, working closely with town department heads and other personnel to facilitate the immediate start of these projects. Through careful document audits and the availability of relevant subject matter experts, the Tidal Basin team is on-track to ensure these projects are eligible for reimbursement through the FEMA Public Assistance Program.

Moving forward, based on our interactions with Town leadership, our intent is to focus on the following identified priorities:

- + Project formulation to create project worksheets for successful reimbursement of costs to repair or replace damaged facilities as prioritized by the Town.
- + Provide tutorials/technical assistance and coordination with state and federal grant portals.

- + Provide guidance and advise on cost effective hazard mitigation opportunities as defined by FEMA policy.
- + Develop tools to assist with the tracking and managing of costs (i.e., equipment records, 214s, materials, contracts).
- + Assist the Town in reviewing insurance policies for properties impacted by Hurricane Ian and ensure future Obtain & Maintain requirements are within FEMA policy/guidelines.

Our team is very closely involved in the Town's current recovery cycle and is intimately familiar with all aspects of their journey through the FEMA Public Assistance process. We firmly believe that selecting Tidal Basin as the Town's Disaster Recovery consultants will foster a productive path to community recovery.

8. References for Similar Completed Projects

Client	Contact Information
University of West Florida	+ Pennie Sparks, Risk Management Coordinator + (P) 850.474.2177 + (E) psparks@uwf.edu
City of Key West, Florida	+ Todd Stoughton, Assistant City Manager + (P) 305.809.3811 + (E) tstoughton@cityofkeywest-fl.gov
Mississippi State Port Authority	+ Tammy Salisbury, Assistant Comptroller + (P) 228.865.4300 ext. 213 + (E) tsalisbury@shipmspa.com

9. Fee Schedule

Position	Staff	Rate
Project Manager	Alyza Supriana	\$165.00
Public Assistance Specialists	Moises Nova Andrew Kemler	\$135.00
Subject Matter Expert	Jeffrey Allen	\$165.00
Environmental Specialist	Tina Hauk	\$125.00
Administrative Support	TBD	\$65.00

*****Tidal Basin provides our Engagement Manager at no additional cost to the Town of Fort Myers Beach. *****

If required, all travel costs will be billed to the Town at cost without mark-up in accordance with local GSA guidelines. Itemized travel below represents estimated per day costs.

Item	Cost
Lodging (Including 12% tax & fees)	\$138.88
Per Diem	\$64.00
Vehicle / Fuel / Incidentals	\$48.00

Appendix: Required Forms

Tidal Basin provides the requested forms on the following pages:

- + Sworn Statement and Indemnification Forms
- + Certificate of Insurance
- + IRS W-9 Form
- + Proposal Form
- + Addendum 1
- + Addendum 2

Tidal Basin has provided references in Section 8, References for Completed Projects.

SWORN STATEMENT UNDER SECTION 287.133 (3) (A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES
This form must be signed in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to the TOWN OF FORT MYERS BEACH by

Maria E. Suppa, Senior Vice President

(Print individual's name and title)

for Tidal Basin Government Consulting, LLC

(Print name of entity submitting sworn statement) whose business address is

126 Business Park Dr, Utica, NY 13502

and (if applicable) its Federal Employer Identification Number (FEIN) is

20-5926493

If the entity has no FEIN, include the Social Security Number of the individual signing this Sworn Statement:

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision or any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt of a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime; or

2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of public entity crime.

5. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with legal power to enter into a binding contract and which bids or appeals to bid on contracts for the provision of goods and services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Indicate which statement applies.)

☒ Neither the entity submitting this sworn statement, nor one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officers determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (ATTACH A COPY OF THE FINAL ORDER).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR A CATEGORY TWO OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Maria E. Suppa

(Signature)

Sworn to and subscribed before me this 26 day of October

2022
~~2018~~

Personally known ☒

Or produced identification ☐

Notary Public-State of NY

My commission expires 6-25-2024

Tracy A Bearse

(Printed, typed, or stamped commissioned name of notary public.)

TRACY A. BEARSE
Notary Public, State of New York
Reg. No. 018E62642723
Qualified in Oneida County
Commission Expires June 25, 2024

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY
and VOLUNTARY EXCLUSION**

Contractor Covered Transactions

(1) The prospective subcontractor of the Sub-recipient, Collier County, certifies, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

(2) Where the Sub-recipient's subcontractor is unable to certify to the above statement, the prospective contract shall attach an explanation to this form.

CONTRACTOR

Tidal Basin Government Consulting, LLC

By: Maria E Suppa
Signature

Maria E. Suppa, Senior Vice President
Name and Title

126 Business Park Drive
Street Address

Utica, NY 13502
City, State, Zip

MHXALUVJKHL3
UEI Unique Entity Identifier (for SAM.gov verification)

10/26/2022
Date

Sub-Recipient Name: Collier County Board of County Commissioners

DEM Contract Number: TBD

FEMA Project Number: TBD

EXHIBIT I
FEDERAL CONTRACT PROVISIONS AND ASSURANCES

LOBBYING CERTIFICATION
(To be submitted with each bid or offer exceeding \$100,000)

The undersigned [Contractor] certifies, to the best of his or her knowledge, that:

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

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Contractor certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

Tidal Basin Government Consulting, LLC
Contractor (Firm Name)

Maria E Suppa
Signature of Contractor's Authorized Official

Maria E. Suppa, Senior Vice President
Name and Title of Contractor's Authorized Official

10/26/2022
Date



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/20/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Gilroy Kernan & Gilroy 210 Clinton Rd New Hartford NY 13413		CONTACT NAME: PHONE (A/C, No, Ext): 315-768-8888 E-MAIL ADDRESS: Service@gkgrisk.com FAX (A/C, No): 315-768-8600		
INSURED Tidal Basin Government Consulting LLC 126 Business Park Drive Utica NY 13502		INSURER(S) AFFORDING COVERAGE		NAIC #
		INSURER A: Federal Insurance Co.		20281
		INSURER B: Westchester Fire Insurance Co		10030
		INSURER C: ACE American Ins Co		22667
		INSURER D: Crum & Forster Insurance Company		44520
		INSURER E:		
INSURER F:				

COVERAGES**CERTIFICATE NUMBER:** 618873273**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:	Y		36062962	6/1/2022	6/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	☐ AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			73618689	6/1/2022	6/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE DED ☒ RETENTION \$ 10,000			78185002	6/1/2022	6/1/2023	EACH OCCURRENCE \$ 20,000,000 AGGREGATE \$ 20,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N ☐	N / A	7176-83-24	6/6/2022	6/6/2023	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B C D	E&O Cyber Excess Cyber			G27459298 008 F14612439 003 EOL237270	6/1/2022 12/18/2021 12/18/2021	6/1/2023 12/18/2022 12/18/2022	E&O Cyber Excess Cyber 5M/5M 5M/5M 5M

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Town of Fort Myers Beach is listed as Additional Insured with respect to the General Liability. 30 days cancellation notice applies.
RFP-23-01-AD

CERTIFICATE HOLDER**CANCELLATION**

Town of Fort Myers Beach
Attention: Town Clerk
2525 Estero Blvd
Fort Myers Beach FL 33931

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Tidal Basin Government Consulting, LLC		
2 Business name/disregarded entity name, if different from above		
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate ☒ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► C Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ►	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)	
5 Address (number, street, and apt. or suite no.) See instructions. 126 Business Park Drive	Requester's name and address (optional)	
6 City, state, and ZIP code Utica, NY 13502		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
			-			-			
or									
Employer identification number									
2	0	-	5	9	2	6	4	9	3

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

Maria E. Suppa

Date ►

3/17/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

PROPOSAL FORM

Town of Fort Myers Beach, Florida

Date: 10/25/22

The undersigned, hereinafter called "Proposer", having reviewed the scope of services requested and familiarized themselves with the local conditions, nature of the work, and having carefully developed an acceptable method of providing services as described herein, and having carefully examined the form of agreement and contract documents shall furnish all materials, labor, services and any other items for the proper execution of contract number **RFP-23-01-AD** at the proposed price stated within this proposal.

**Information for Proposal Fee to be included within the Proposal Format Part II
(TO BE FILLED IN)**

CONTRACTOR REQUIREMENTS

Acknowledgment is hereby made of receipt of the following addenda issued during the proposal period:

Addendum No. 1 Date 10/24/22 Addendum No. _____ Date _____

Addendum No. _____ Date _____ Addendum No. _____ Date _____

(PLEASE TYPE INFORMATION BELOW)

SEAL IF PROPOSAL IS BY CORPORATION

State of Florida Department of State Certificate of Authority

Proposer Tidal Basin Government Consulting, LLC

Document Number M10000000434

By Secretary of State

Occupational License No. Not applicable

Signature Mona E Suppa



NOTE: By signing and submitting this Proposal for consideration by the Town of Fort Myers Beach, Florida the vendor acknowledges that they have read, understand and agree to all aspects of the specifications as presented without reservation, exception or alteration.

[if applicable]

Florida DBPR Contractor's License, Certification and/or

Title Not applicable

Registration No. Not applicable

Address _____

Type of Contractor's License, Certification and/or

Registration Not applicable

Expiration Date Not applicable

Person to contact concerning this bid:

Bill Slater, Vice President

Phone/Toll Free/Fax 888.282.1626

Page 2 of 2
RFP-23-01-AD

Town Permits/Fees required for this project: Not applicable
Home Page Address Not applicable
Permit Cost Not applicable
Person to contact for emergency service:
Phone/Cell/Pager No. _____

Person to contact for disaster service: Bill Slater

Home Address: 3320 Buffalo Trail, DeLand, Florida, 32724

Home Phone/Cell/Pager No: Cell: 315.440.4775

Names and addresses of proposed Subcontractors to be utilized for work on this project:

1. N/A

2.

3.

4.

**Information Sheet
for Transactions and Conveyances
Corporation Identification**

The following information will be provided to the Town for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, capitalization, etc. is exactly as registered with the state or federal government.

(Please Circle One)

Is this a Florida Corporation:

Yes

or

No

If not a Florida Corporation,

In what state was it created: Washington, DC

Name as spelled in that State: Tidal Basin Government Consulting, LLC

What kind of corporation is it:

"For Profit"

or

"Not for Profit"

Is it in good standing:

Yes

or

No

Authorized to transact business in Florida:

Yes

or

No

State of Florida Department of State Certificate of Authority Document No.: M10000000434

Does it use a registered fictitious name:

Yes

or

No

Names of Officers:

President: Stephen T. Surace Secretary: Bruce Winchell

Vice President: Bill Slater Treasurer: Bruce Winchell

Director: Ron Cuccaro (Executive Chairman) Director: Daniel A. Craig (CEO)

Other: Maria E. Suppa, Asst. Treasurer Other: _____

Name of Corporation (As used in Florida):

Tidal Basin Government Consulting, LLC

(Spelled exactly as it is registered with the state or federal government)

Corporate Address:

Post Office Box: N/A

Town, State Zip: _____

Street Address: 126 Business Park Drive

Town, State, Zip: Utica, NY 13502

(Please provide post office box and street address for mail and/or express delivery; also for recorded instruments involving land.)

Information Sheet continued
Page 2 of 2

Corporate Identification

Federal Identification Number: 20-5926493

(For all instruments to be recorded, taxpayer's identification is needed)

Contact person for company: Bill Slater, Vice President

Telephone Number: 315.440.4775 Facsimile Number: N/A

Name of individual who will sign the instrument on behalf of the company:

Bill Slater

(Upon Certification of Award, Contract shall be signed by the President or Vice-President. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded contractor shall submit a copy of the resolution together with the executed contract to the Office of Purchasing.)

(Spelled exactly as it would appear on the instrument)

Title of the individual named above who will sign on behalf of the company:

Vice President



ADDENDUM TO CONTRACT DOCUMENTS

RFP-23-01-AD

Addendum No.: 1

CONTRACT/PROJECT NAME: Disaster Recovery Consultant Services

DATE OF ISSUE: October 24, 2022

The following information shall be included in the Contract documents and is hereby made part of the project documents in the form of clarification, addition, deletion or revision to the contract requirements, specifications and/or drawings.

CHANGE TO DUE DATE OF DOCUMENTS

The sample contract incorrectly includes a signature (page 80). This oversight should not be construed or interpreted as an award of contract to any proposer. Attached is a clean sample contract.

Please Print Tidal Basin Government Consulting, LLC /888.282.1626

Company Name & Phone Number

Maria E Suppa

Signature

Yadzia Roa, Contracts Manager
bids@fmbgov.com
239-765-0202



ADDENDUM TO CONTRACT DOCUMENTS

RFP-23-01-AD

Addendum No.: 2

CONTRACT/PROJECT NAME: Disaster Consultant Services

DATE OF ISSUE: October 31, 2022

The following information shall be included in the Contract documents and is hereby made part of the project documents in the form of clarification, addition, deletion or revision to the contract requirements, specifications and/or drawings.

Clarifications

Q: Could the Town please confirm the proposal due date?

A: Proposals are due on November 3, 2022 by 2 p.m. local time. Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line “ SEALED BID: RFP-23-01-AD”

Q: I downloaded the RFP packet for the Disaster Recovery Consultant Services and I cannot seem to locate the Price/Fee schedule within the packet. Could you please direct me to where I can retrieve these documents so I properly return the RFP to you all on November 3rd, 2022?

A: There are no standardized forms, please provide a pricing list deemed fit.

Q: RFP, page 10 - The major delivery services are all reporting service distributions for the area affected by Hurricane Ian- including Fort Myers Beach, FL (zip code 33931). Will the government please allow for electronic submission instead of hard copies?

A: Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line “ SEALED BID: RFP-23-01-AD”

Q. RFP, page 19. Certificate of Liability Insurance- Will the Government please provide the intent of this form? It appears to have been already partially completed with information for another Contractor and Client.

A: This is a sample. If awarded a contract, the organization will need to provide a certificate of liability insurance from your insurance carrier naming the Town of Fort Myers Beach as additional insured.

Q: RFP, page 31; Certification Regarding Debarment, Suspension Ineligibility and Voluntary Exclusion- Will the Government please provide the intent of this form?

A: The form is pertinent to the Executive Order 12549- Debarment and suspension.

Q: RFP, page 32 Anticipated Disadvantaged, Minority, Women or Veteran Participation Statement- Will the Government please provide the intent of this form? It appears to be a form for Collier County.

A: That was an oversight on our part. The forms should say Town of Fort Myers Beach. We have no affiliation to Collier County.

Q: page 13- Will the Government please provide additional details for what items should be included in the Management Plan?

A: We are leaving up to the interested vendors to provide.

Q: Will the Government please supply the form to be filled out to the list the 3 references?

A: The Town doesn't have a specific form for references. Please include your 3 references with their contact information as an additional sheet in your proposal.

Q: Will the Government please clarify if they want Contractors to supply reference contracts in 3 separate areas of the proposal? The RFP is asking reference in the following sections:

- Page 3, part 6.c
- Part III. 4.g.
- Part III.8.

A: Yes, all three sections require references, we understand if they are the same references.

Q: For Appendix 1, Exhibit I-8, please confirm whether the stated Data Collection monitoring standards are intended to be required for this solicitation. If yes, the link for the Project Monitoring Standards is not included in Exhibit I-8 of Addendum 1; please provide a link.

A: Please copy and paste the link provided into a web page.

<https://floridadep.gov/sites/default/files/PhysicalMonitoringStandards.pdf>

Q. Many of the forms provided specifically identify Collier County, whereas the Town is in Lee County. Should vendors cross out Collier County an input Lee County or will the Town correct that via addendum?

A: Yes, vendors can cross out and input Lee County.

Q: The RFP states that proposers will submit a fee schedule showing hourly rates for consultant services and hourly rates for education services and an itemized list of all direct and indirect costs associated with the performance of this contract. Are the direct costs considered fully loaded bill rates, and the indirect costs considered other than direct costs?

A: Yes.

Q: Please confirm that vendors need to provide proof of the necessary insurance coverages in the form of a sample certificate of insurance as part of their proposal, and that a certificate of insurance naming the Town as additional insured is only required once an award is made.

A: Yes, that is correct.

Q: Please advise if submitting for the subject RFP via DemandStar though the online portal only is acceptable to the Town, or does the requirement for 1 original, and 4 bound copies stand given the emergency procurement (reduced timeframe to submit)?

A: Currently the Town does not have the ability to use the Demand Star portal. Due to the impact of Hurricane and lack of mail services to the Town, we will temporarily accept electronic bids via email sent to bids@fmbgov.com. They must be marked in the subject line “ SEALED BID: RFP-23-01-AD”

Please Print Tidal Basin Government Consulting, LLC /888.282.1626

Company Name & Phone Number

Mona E Suppa

Signature

Yadzia Roa, Contracts Manager
bids@fmbgov.com
239-765-0202

1. **Requested Motion:**

Meeting Date: November 21, 2022

A discussion regarding the waiving of permit fees

Why the action is necessary:

What the action accomplishes:

2. **Agenda:**

ADMINISTRATIVE AGENDA

3. **Requirement/Purpose:**

4. **Submitter of Information:**

5. **Background:**

Attachments:

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk

Created/Initiated - 11/17/2022
Approved - 11/18/2022
Final Approval - 11/18/2022

1. **Requested Motion:**

Year End Financial Report

Meeting Date: November 21, 2022

Why the action is necessary:

What the action accomplishes:

2. **Agenda:**

TOWN MANAGER'S ITEMS

3. **Requirement/Purpose:**

4. **Submitter of Information:**

5. **Background:**

Attachments:

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk

Created/Initiated - 11/17/2022

1. **Requested Motion:**

Meeting Date: November 21, 2022

Designation of a Council representative and alternate to the seven outside committees on which Council members have previously served.

Why the action is necessary:

What the action accomplishes:

2. **Agenda:**

COUNCILMEMBERS ITEMS AND
REPORTS

3. **Requirement/Purpose:**

4. **Submitter of Information:**

5. **Background:**

Reorganization of the Council includes selecting regular and alternate committee representatives for committees that are influential in decision making that affects the interests of the Town. The committees include:

Coastal and Heartland National Estuary Partnership - Policy Committee:

<https://www.chnep.org>

A partnership of citizens and elected officials, and resource managers working together to protect and restore water and wildlife habitat in Central and Southwest Florida. The Policy Committee establishes the general policy for the CHNEP, has authority over program administration, appoints members to other committees and approves the CHNEP's budget.

Meets January 26, 2023, May 25, 2023 and September 21, 2023. Current representation : Town Environmental Services, alternate TBD.

Coastal Advisory Committee:

<http://www.leegov.com/naturalresources/marine/beachmgmnt/CAC>

A Lee County government committee that advises the BoCC, staff and various related advisory boards when proceeding with a project affecting beach and shoreline preservation regarding the proper methods of helping to conserve the beaches of Lee County. Meets periodically throughout the year, usually on the 4th Monday; current representation: Town Environmental Services, alternate TBD.

Fort Myers Beach Elementary School Youth Council:

Current representation: vacant (Murphy)

Horizon Council: <http://www.leecountybusiness.com/horizon-council>

A Lee County Economic Development Office committee that advises the BoCC on economic development issues; current representation: Council Member Allers

Metropolitan Planning Organization: <http://leempo.com>

A Lee County BoCC committee that provides regional leadership addressing long term challenges and opportunities facing Southwest Florida. Meets monthly, 3rd Friday of the month; current representation: Vacant (Murphy), alternate Council Member Atterholt

Southwest Florida Regional Planning Council: <http://www.swfrpc.org>

A self-governed committee that provides regional leadership addressing long term challenges

and opportunities facing Southwest Florida. Meets 3rd Thursday of the month; current representation: none. The Town receives reports upon request.

Tourist Development Council: <https://www.leevcb.com/tourist-development-council>
Membership on the Tourist Development Council includes one seat which rotates every two years between the City of Sanibel and the Town of Fort Myers Beach. Currently, the Town holds that seat, which will expire June 30, 2024. The TDC typically meets on the second Tuesday of each month. The Town Council shall appoint one elected official to serve as the Town's representative: Current representation: Council Member Atterholt alternate vacant (Murphy)

Attachments:

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk
John R Herin Jr, Town Attorney
Amy Baker, Town Clerk
Roger Hernstadt, Town Manager

Created/Initiated - 11/9/2022
Approved - 11/10/2022
Approved - 11/11/2022
Final Approval - 11/11/2022

1. **Requested Motion:**

Meeting Date: November 21, 2022

Designation of a Council representative to the six Town advisory boards/committees.

Why the action is necessary:

It is the policy of the Town Council to reorganize annually and designate a liaison to each of the Town's advisory boards or committees.

What the action accomplishes:

2. **Agenda:**

COUNCILMEMBERS ITEMS AND
REPORTS

3. **Requirement/Purpose:**

Other

4. **Submitter of Information:**

5. **Background:**

In accordance with Town Council Policies and Procedures, Council reorganization takes place at the first meeting after the second Tuesday in November. The reorganization may include designating a liaison to the Town's advisory committees. Whenever Town Council is called upon to make committee determinations, the Council should confirm its desire to continue its current committee structure.

The scope of each committee is listed as follows:

Anchorage Advisory Committee. Current liaison: Vacant (Hosafros)

Advises Town Council and staff on all issues pertaining to the Town's public mooring field.

Audit Committee. Current liaison: Vacant (Murphy)

To serve in an advisory capacity to the Town Council in the election of an auditor to conduct the Town's annual financial audit and for other purposes as directed by Town Council.

Bay Oaks Recreational Campus Advisory Board. Current liaison: Council Member Allers

To serve the Town as a community center and recreational facility, providing individuals with social and community activities and events for both residents and visitors.

Cultural and Environmental Learning Center Advisory Board. Current liaison: Council Member Atterholt

Oversees the Mound House and Newton Park; the goals are to manage and promote the cultural, historical and environmental resources of Fort Myers Beach.

Marine Resources Task Force. Current liaison: Council Member Veach

To promote stewardship of our marine resources, to stop further damage and to rehabilitate Estero Bay and its surrounding waters, wildlife, plant life and air/water quality.

Public Safety Committee. Current liaison: Council Member Allers

To address any safety and transportation issues specifically assigned to the committee by the Town Council for the purpose of the health, safety and welfare of the citizens and visitors to the Town.

Attachments:

Financial Impact:

6. **Alternative Action**

7. **Management Recommendations:**

8. **Recommended Approval:**

Amy Baker, Town Clerk

John R Herin Jr, Town Attorney

Amy Baker, Town Clerk

Roger Hernstadt, Town Manager

Created/Initiated - 11/9/2022

Approved - 11/10/2022

Approved - 11/11/2022

Final Approval - 11/11/2022