



JOINT LEGISLATIVE COMMITTEE ON THE BUDGET

STATE CAPITOL
P.O. BOX 44294, CAPITOL STATION
BATON ROUGE, LOUISIANA 70804
(225) 342-1964

REPRESENTATIVE JEROME ZERINGUE
CHAIRMAN

SENATOR BODI WHITE
VICE-CHAIRMAN

REVISED AGENDA

Thursday, December 14, 2023
11:00 a.m.
House Committee Room 5

I. CALL TO ORDER

II. ROLL CALL

III. BUSINESS

1. Fiscal Status Statement and Five-Year Base-Line Budget
2. Interpretation of legislative intent for appropriations contained in Act 397 of the 2023 Regular Session of the Legislature and Acts 119 and 120 of the 2021 Regular Session of the Legislature, in accordance with the provisions of R.S. 24:653(E) (ADDED ACTS)
3. ~~Review and approval of a contract extension between McNeese State University and Ellucian Company, L.P., in accordance with the provisions of R.S. 39:198(M)~~
(REMOVED AGENDA ITEM)
4. Review and approval of Louisiana Infrastructure Technical Assistance Corporation's program guidelines, in accordance with the provisions of R.S. 39:100.201(D)
5. Review and approval of Insure Louisiana Incentive Program grant awards in accordance with R.S. 22:2364(F)
6. Review and approval of Water Sector Commission recommendations, in accordance with the provisions of R.S. 39:100.56
7. Update from the Office of the Lieutenant Governor/Louisiana Department of Culture, Recreation & Tourism on the status of the Major Events Incentive Program
(ADDED AGENDA ITEM)

IV. CONSIDERATION OF ANY OTHER BUSINESS THAT MAY COME BEFORE THE COMMITTEE

V. ADJOURNMENT

Any person who does not feel comfortable giving testimony in person may submit a prepared statement in lieu of appearing before the committee:

A. Any interested person or any committee member may file with the committee a prepared statement concerning a specific instrument or matter under consideration by the committee or concerning any matter within the committee's scope of authority, and the committee records shall reflect receipt of such statement and the date and time thereof.

B. Any person who files a prepared statement which contains data or statistical information shall include in such prepared statement sufficient information to identify the source of the data or statistical information. For the purposes of this Paragraph, the term "source" shall mean a publication, website, person, or other source from which the data or statistical information contained in the prepared statement was obtained by the person or persons who prepared the statement.

NOTE: Statements emailed to metoyers@legis.la.gov and received prior to noon on Wednesday, December 13, 2023, will be distributed to the committee members prior to the meeting.

JEROME "ZEE" ZERINGUE, CHAIRMAN

PLEASE SUBMIT A WITNESS CARD TO THE COMMITTEE ADMINISTRATIVE ASSISTANT BEFORE THE MEETING BEGINS IF YOU WANT TO TESTIFY BEFORE THE COMMITTEE.

Agenda Item #1

Fiscal Status Statement & Five-Year Base-Line Budget

**JOINT LEGISLATIVE COMMITTEE ON THE BUDGET
STATE GENERAL FUND FISCAL STATUS STATEMENT
FISCAL YEAR 2023-2024
(\$ in millions)**

December 14, 2023

	NOVEMBER 2023	DECEMBER 2023	DECEMBER 2023 Over/(Under) NOVEMBER 2023
<u>GENERAL FUND REVENUE</u>			
Revenue Estimating Conference, May 18, 2023	\$11,925.400	\$11,925.400	\$0.000
FY 22-23 Revenue Carried Forward into FY 23-24	\$432.168	\$432.168	\$0.000
Total Available General Fund Revenue	\$12,357.568	\$12,357.568	\$0.000
<u>APPROPRIATIONS AND REQUIREMENTS</u>			
Non-Appropriated Constitutional Requirements			
Debt Service	\$437.822	\$437.822	\$0.000
Interim Emergency Board	\$1.323	\$1.323	\$0.000
Revenue Sharing	\$90.000	\$90.000	\$0.000
Total Non-Appropriated Constitutional Requirements	\$529.145	\$529.145	\$0.000
Appropriations			
General (Act 447 of 2023 RS)	\$11,248.709	\$11,248.709	\$0.000
Ancillary (Act 408 of 2023 RS)	\$10.500	\$10.500	\$0.000
Judicial (Act 400 of 2023 RS)	\$178.884	\$178.884	\$0.000
Legislative (Act 415 of 2023 RS)	\$87.447	\$87.447	\$0.000
Capital Outlay (Act 465 of 2023 RS)	\$166.819	\$166.819	\$0.000
Total Appropriations	\$11,692.358	\$11,692.358	\$0.000
Other Requirements			
Funds Bill (Act 410 of 2023 RS)	\$107.500	\$107.500	\$0.000
Transfer to Athletic Trainer Development Fund (pursuant to Act 495 of 2022 RS)	\$1.500	\$1.500	\$0.000
Total Other Requirements	\$109.000	\$109.000	\$0.000
Total Appropriations and Requirements	\$12,330.504	\$12,330.504	\$0.000
General Fund Revenue Less Appropriations and Requirements	\$27.065	\$27.065	\$0.000

II. FY 2022-2023 Fiscal Status Summary:

In accordance with Act 1092 of the 2001 Regular Session and Act 107 of the 2002 First Extraordinary Session (R.S. 39:75), the first budget status report presented after October 15th shall reflect the fund balance for the previous fiscal year. "At the first meeting of the Joint Legislative Committee on the Budget after publication of the Comprehensive Annual Financial Report for the state of Louisiana, the commissioner of administration shall certify to the committee the actual expenditures paid by warrant or transfer and the actual monies received and any monies or balances carried forward for any fund at the close of the previous fiscal year which shall be reflected in the budget status report."

FY23 GENERAL FUND DIRECT SURPLUS/(DEFICIT) - ESTIMATED (millions)

FY22 Surplus/(Deficit) 726.521

FY23 General Fund - Direct Revenues:

Actual General Fund Revenues	13,867.361
General Fund - Direct Carryforwards to FY23	404.875
Other Transfers	0.335

Total FY23 General Fund - Direct Revenues 14,272.571

FY23 General Fund - Direct Appropriations & Requirements:

Draws of General Fund - Direct Appropriations	(10,588.613)
General Obligation Debt Service	(434.304)
Transfers to Revenue Sharing Fund (Z06) - Constitution 7:26	(90.000)
Transfers Out to Various Funds for 20-XXX	(148.632)
Transfers per Legislative Acts - Act 447 of 23RS - Funds Bill - Various Funds	(893.129)
Transfers to Coastal Protection and Restoration Fund (Z12) - Constitution 7:10.2 and R.S. 49:214.5.4	(25.810)
Transfer/Payment to LASERS/TRSL - Constitution 7:10.16. (B)(1)	(87.000)
Transfer to Budget Stabilization Fund (Z08) - R.S. 39:94. A. (2)(a)	(69.708)
Transfer to Revenue Stabilization Fund (Z25) - Constitution 7:10.15. (D) and 7:10.16. (B)(2)	(1,219.810)
Use of FY22 Surplus	(725.311)

Total FY23 General Fund - Direct Appropriations & Requirements (14,282.318)

General Fund Direct Cash Balance 716.774

Obligations Against the General Fund Direct Cash Balance:

General Fund - Direct Carryforwards to FY24	(432.168)
Unappropriated Use of FY22 Surplus	(1.209)
FY 23 adjustment completed in FY 24 - Remote Sellers - June 2023 taxes collected in July and distributed to LDR in August	21.271
FY24 Transfer from Department of Justice Legal Support Fund (JS5) - R.S. 49:259 (Excess over \$10 million cap)	27.863
FY24 Transfer to Mineral and Energy Settlement Fund (N07)	(2.500)
FY24 Transfer to Motor Carrier Regulation Fund (Y01)	(0.020)
FY24 Transfer to Fire Marshal Fund (P01) - R.S. 22:837.C	(4.573)

Total Adjustments (391.336)

Net General Fund Direct Surplus/(Deficit) 325.437

III. Current Year Items Requiring Action

IV. Horizon Issues Not Contained in 5-Year Plan

The Hurricane and Storm Damage Risk Reduction System (HSDRRS) Projects were completed May 2022. At that time, the State's share of the total cost was \$1.19 billion, and in addition, the State faced accrued construction interest in excess of \$600 million. Federal legislation passed in December 2020 and December 2022, provides an option to forgive the accrued construction interest if the State makes specified required payments by September 30, 2021 and by September 30, 2023, which was achieved through payments totaling \$800 million and approved crediting of other projects totaling \$110 million. The State must pay the remaining principal by June 1, 2032. According to the U.S. Army Corps of Engineers, as of September 27, 2023, the State's remaining share of the total costs of the HSDRRS is \$240 million. However, additional crediting is under review by the Corp, which will further reduce the remaining amount owed.

**FIVE YEAR BASE LINE PROJECTION
STATE GENERAL FUND SUMMARY
APPROPRIATED**

	Prior Fiscal Year 2022-23	Official Current Fiscal Year 2023-2024	Projected Fiscal Year 2024-2025	Projected Fiscal Year 2025-2026	Projected Fiscal Year 2026-2027
REVENUES:					
Taxes, Licenses & Fees	\$16,035,000,000	\$15,277,400,000	\$15,102,900,000	\$14,665,600,000	\$14,935,500,000
Less Dedications	(\$3,746,900,000)	(\$3,352,000,000)	(\$3,211,400,000)	(\$3,177,400,000)	(\$3,208,900,000)
TOTAL REC REVENUES	\$12,288,100,000	\$11,925,400,000	\$11,891,500,000	\$11,488,100,000	\$11,726,600,000
ANNUAL REC GROWTH RATE		-2.95%	-0.28%	-3.39%	2.08%
Other Revenues:					
Carry Forward Balances	\$404,874,737	\$432,168,187	\$0	\$0	\$0
Total Other Revenue	\$404,874,737	\$432,168,187	\$0	\$0	\$0
TOTAL REVENUES	\$12,692,974,737	\$12,357,568,187	\$11,891,500,000	\$11,488,100,000	\$11,726,600,000
EXPENDITURES:					
General Appropriation Bill (Act 447 of 2023 RS)	\$10,028,395,894	\$10,802,849,888	\$10,912,590,475	\$11,119,433,598	\$11,353,958,189
Ancillary Appropriation Bill (Act 408 of 2023 RS)	\$0	\$0	\$9,046,777	\$14,978,568	\$21,117,971
Non-Appropriated Requirements	\$526,904,967	\$529,145,269	\$547,884,908	\$548,268,038	\$536,545,365
Judicial Appropriation Bill (Act 400 of 2023 RS)	\$174,577,666	\$178,883,689	\$178,883,689	\$178,883,689	\$178,883,689
Legislative Appropriation Bill (Act 415 of 2023 RS)	\$85,777,844	\$87,296,566	\$87,296,566	\$87,296,566	\$87,296,566
Special Acts	\$0	\$0	\$12,530,524	\$12,530,524	\$12,530,524
Capital Outlay Bill (Act 465 of 2023 RS)	\$50,000,000	\$166,819,000	\$0	\$0	\$0
TOTAL ADJUSTED EXPENDITURES (less carryforwards)	\$10,865,656,371	\$11,764,994,412	\$11,748,232,939	\$11,961,390,983	\$12,190,332,304
ANNUAL ADJUSTED GROWTH RATE		8.28%	-0.14%	1.81%	1.91%
Other Expenditures:					
Carryforward BA-7s Expenditures	\$404,874,737	\$456,509,214	\$0	\$0	\$0
Supplemental Bills (Act 1 of 2023 1ES; Act 28 of 23 RS; Act 397 of 23 RS)	\$644,395,542	\$0	\$0	\$0	\$0
Funds Bills (Act 167 of 2022 RS; Act 410 of 2023 RS) and Other Transfers (Act 495 of 22RS; R.S. 100.121)	\$771,404,474	\$109,000,000	\$0	\$0	\$0
Total Other Expenditures	\$1,820,674,753	\$565,509,214	\$0	\$0	\$0
TOTAL EXPENDITURES	\$12,686,331,124	\$12,330,503,626	\$11,748,232,939	\$11,961,390,983	\$12,190,332,304
PROJECTED BALANCE	\$6,643,613	\$27,064,561	\$143,267,061	(\$473,290,983)	(\$463,732,304)
Oil Prices included in the REC forecast.	\$81.80	\$73.48	\$70.33	\$66.41	\$66.90

Agenda Item #2

Interpretation of
legislative intent for
appropriations contained
in Act 397 of the 2023
Regular Session of the
Legislature and Acts 119
and 120 of the 2021
Regular Session of the
Legislature, in accordance
with the provisions of R.S.
24:653(E)

RS 24:653

§653. Duties and functions

A. The committee shall make such study and examination of the matters pertaining to the budgeting and fiscal affairs of the state and its political subdivisions, their funds, revenues, expenditures, and any other financial affairs of the state and of its political subdivisions as may be deemed desirable by the committee or the legislature. The committee may also study and examine all requests for professional, personal, social service, and consulting service contracts to determine the impact of privatizing state government programs, functions, or activities. The committee shall make such reports of its findings and recommendations with regard to such matters to the legislature upon its request or as is deemed advisable by the committee.

B. Prior to and during each regular session of the legislature, the joint committee may make such studies and hold such hearings with respect to budget requests or statements and with respect to the executive budget as it shall deem appropriate and are necessary to carry out its duties and functions.

C. Following the review, analysis, and study of the proposed executive budget, the committee shall submit its findings and recommendations thereon to the members of the legislature not later than two weeks prior to each regular session of the legislature.

D. The committee shall make such continuing study and examination of matters pertaining to the budgeting of the state revenues and their expenditures, and the fiscal affairs of the state and its agencies, and shall make quarterly reports and recommendations to the legislature and such other reports as the committee or the legislature deems advisable.

E. The committee shall interpret the legislative intent respecting all fiscal and budgetary matters of the state and conduct general oversight and review of the budget execution processes of the various budget units and other agencies of the state when necessary.

F. The committee shall study, review, and approve or disapprove all transfers of funds from one program specified in the allotments established in each agency's budget to another program. Except as provided in R.S. 39:73 and 87.4, no transfer of funds from one program specified in the allotments in an agency's budget to another shall be made without prior approval of the committee.

G. The committee shall have the full power and authority to adopt rules and regulations prescribing and governing its procedures, policies, meetings, and any and all other activities relating to its functions and duties, including the power and authority to issue binding directives to agencies concerning the proper and efficient execution of their respective budgets as same were approved by the legislature.

H.(1) The committee shall have a litigation subcommittee which shall monitor and study the amounts of state funds required to pay judgments and compromises arising out of lawsuits against the state, its departments, and, with respect to payment of state funds as insurance premiums, the insurers thereof. The committee, by its own rules, motions, or resolutions, shall provide for the size, membership, appointment, all administrative matters, and the delegated powers and duties of the litigation subcommittee.

(2) No attorney representing the state or any of its departments or agencies or any of its employees entitled to indemnification under R.S. 13:5108.1 shall sign any compromise or settlement which obligates the state to pay five hundred thousand dollars or more without prior consultation with the attorney general and the members of the litigation subcommittee. The consultation with the members of the litigation subcommittee shall occur in executive session.

(3)(a) At the request of the litigation subcommittee, any department, agency, board, commission, educational institution, or other state entity entitled to indemnification by the state or any employer of an employee entitled to indemnification under R.S. 13:5108.1 shall report on any corrective measures or actions taken to mitigate state risk exposure if the litigation subcommittee determines that such a report is necessary after consideration of a compromise or settlement of litigation.

(b) A meeting of the litigation subcommittee to receive a report from a state entity on corrective

measures or actions pursuant to this Paragraph shall occur only after the subject litigation has been concluded. The litigation subcommittee may require that any indemnified state entity or employer of an indemnified employee appear at one or more meetings of the litigation subcommittee to discuss and report on corrective measures or actions.

(c) Any information provided by a state entity pursuant to this Paragraph may only be presented in executive session, and any documentation prepared or compiled by the state entity pursuant to this Paragraph shall not be subject to disclosure pursuant to the Public Records Law set forth in R.S. 44:1 et seq.

I. The committee shall have the authority to nullify a penalty applied by the office of risk management relative to a state agency which has failed to receive certification after undergoing a loss prevention audit, as provided in R.S. 39:1536(B).

J. The committee may establish a subcommittee to execute its duties relative to oversight of performance-based budgeting under the Louisiana Government Performance and Accountability Act, as provided in Subpart D of Part II of Chapter 1 of Subtitle I of Title 39 of the Louisiana Revised Statutes of 1950. When the subcommittee acts on behalf of the committee, the chairman of the subcommittee shall provide to each member of the committee a summary report of the subcommittee's action.

K.(1) In the conduct of its responsibility to discharge the constitutional fiscal and budgetary responsibilities of the Louisiana Legislature, the committee shall consider the operating budgets of public entities and salaries of particular public officials which by law require the approval of the committee in accordance with the following:

(a) The committee shall consider operating budgets in advance of the beginning of a subject entity's fiscal year. If the committee finds that the entity has failed to receive the required approval, either by failure to appear or by committee disapproval of its budget, the committee may adopt a resolution to direct the commissioner of administration and the state treasurer to deny any warrant or payment of money from the state treasury for any amount contained within that budget. The committee may also adopt a resolution to direct the commissioner of administration and state treasurer to recommence the acceptance of warrants. If the committee determines that an entity whose operating funds are administered outside of the state treasury has failed to receive the required approval of its budget, either by failure to appear or by committee disapproval of its budget, the committee may adopt a resolution to that effect, and any expenditure of public monies by such entity shall constitute a violation of the provisions of Article VII, Section 14 of the Constitution of Louisiana.

(b) The consideration of salaries of public officials that by law require the approval of the committee shall occur prior to the execution of any employment contract for that official. The state shall not be liable for any payment of such salary if the salary has not been approved by the Joint Legislative Committee on the Budget. The committee shall have the authority to adopt a resolution to direct the commissioner of administration and the state treasurer to deny any warrant or payment of money from the state treasury for any monies related to the payment of the salary at issue. The committee is also authorized to adopt a resolution to direct the commissioner of administration and state treasurer to recommence the acceptance of warrants.

(2) The provisions of this Section shall have no effect on the provisions of any contract which is in effect prior to July 1, 2008.

(3) Notwithstanding any contrary provision of law, the chairman of the Joint Legislative Committee on the Budget may grant an entity, for good cause shown, an extension of time, not to exceed thirty days, to comply with the provisions of this Subsection, and the Joint Legislative Committee on the Budget may grant an additional extension of time.

L.(1)(a) Upon receipt of the reports from the various departments within the executive branch of state government as provided by R.S. 36:8(A)(6) and the public postsecondary education management boards as provided by R.S. 17:3130(C) and 3351(F), the Joint Legislative Committee on the Budget shall transmit the reports to the legislative fiscal office for review and analysis and may conduct hearings to review the reports.

(b) The legislative fiscal office shall review the reports and perform any additional analysis of the reports that is necessary to provide an accurate actual estimate as compared to the fiscal note as the bill was enacted.

(2) The reports required to be submitted under this Section shall be in a manner as prescribed by the chairman of the Joint Legislative Committee on the Budget and shall be accompanied by such other information as the chairman may require. At a minimum, the report shall present the differences between the original estimate as the bill was enacted and the actual current revenues or expenditures. Depending upon the scope of the original legislation, the comparisons between the fiscal note as the bill was enacted and the actual amounts shall include but not be limited to tax increases, decreases, fee increases and repeals, tax exemptions, suspensions, credits, rebates, exclusions, and deductions, among others.

(3) No later than February first of each year, the committee shall report its findings in a public meeting relative to any legislation that has been enacted that affects state revenues, public postsecondary education management boards and the related institutions or the various departments and the related entities and that legislation has a fiscal impact which has increased by the amount of one million dollars or more over the amount of the fiscal note as the bill was enacted. The review and analysis shall also examine the receipt, expenditure, allocation, dedication, or means of financing to determine specifically how the increases impact state revenue, the departments, agencies, boards, commissions, and like entities within the executive branch of state government, as well as among the public postsecondary education institutions of the state. The Joint Legislative Committee on the Budget shall transmit copies of the final report to the governor, the president of the Senate, and the speaker of the House of Representatives, and distribute a copy to each member of the legislature.

M.(1) All economic and financial reports for projects submitted in conjunction with the request for approval of the Joint Legislative Committee on the Budget in excess of a total state commitment of ten million dollars for the term of the project shall provide the following information:

(a) Inclusion of all input information, data, and assumptions, including but not limited to data sources, economic growth assumptions, and an assessment/basis of the reasonableness of each.

(b) A description of the analytical model employed for the report and how each input was utilized with that model.

(c) Results in terms of value-added, household earnings, and employment, and a description of each concept.

(d) Results by industry sector, with an assessment of possible adverse effects on sectors that compete with the subsidized company for in-state customers.

(e) Explicit identification of the project's effect on direct expenditure requirements in the state budget or any reduction in taxes or state revenues, including but not limited to tax exemptions, exclusions, deductions, reductions, repeals, rebates, incentives, abatements, or credits.

(f) An additional assessment by the secretary of the Department of Economic Development regarding the extent to which the project would not have occurred but for the proposed state financial support. The secretary's assessment shall reference other business factors which contributed to the project activity occurring and factors which will be required for ongoing sustainability including but not limited to labor, transportation, energy, among others.

(g) Cost/benefit comparisons of the incentives in the package compared to the costs in the package shall be for the same period of time or the same term, both for the direct benefits to the state as well as the indirect benefits to the state.

(2)(a) The department shall submit the request for Joint Legislative Committee on the Budget approval of the project with the analysis to the committee for its review at least seventeen business days, or as permitted by the chairman, prior to the meeting for which the department is seeking the committee's approval. In the event that the chairman specifies a request submission period that is less than seventeen business days, the chairman shall notify all members of the committee of the revised submission time period. Presentation of the information required shall be in a format developed by the department in consultation with the Legislative Fiscal Office and the Joint Legislative Committee on the Budget.

(b) Upon receipt of the request, the Joint Legislative Committee on the Budget shall transmit the report to the legislative fiscal office for evaluation of the department's assessment and the legislative fiscal office shall make such information available to the committee during its review.

(3) For the purposes of this Section and notwithstanding any other provision of law to the contrary, "project" shall mean any public-private partnership, agreement with a nonpublic party, lease, cooperative endeavor agreement, memorandum of understanding, or other contractual agreement which would result in or is expected to result in the obligation of state resources or the expenditure of revenues from the operation, management, or control of a state resource for the purposes of engendering economic growth or development in the state through the utilization of certain incentives, including but not limited to tax exemptions, exclusions, deductions, reductions, repeals, rebates, incentives, abatements, or credits.

N.(1) The committee shall have a dedicated fund review subcommittee which shall review and make recommendations on special funds in the state treasury that dedicate state revenue.

(2) The committee, by its own rules, motions, or resolutions, shall provide for the size, membership, appointment, all administrative matters, and the delegated powers and duties of the dedicated fund review subcommittee. The committee shall provide that the membership of the subcommittee is bipartisan and diverse.

(3) No later than September 1, 2017, and every two years thereafter, the committee shall provide for the dedicated fund review subcommittee.

(4) The dedicated fund review subcommittee shall conduct the review of special funds and submit recommendations to the committee as required in R.S. 49:308.5.

Added by Acts 1976, No. 538, §3, eff. March 10, 1980. Acts 1984, No. 694, §1; Acts 1997, No. 738, §1; Acts 1997, No. 1465, §1, eff. July 15, 1997; Acts 1998, 1st Ex. Sess., No. 11, §1; Acts 2001, No. 894, §1, eff. June 26, 2001; Acts 2008, No. 842, §1, eff. July 8, 2008; Acts 2010, No. 861, §10; Acts 2013, No. 96, §2, eff. July 1, 2013; Acts 2014, No. 704, §1, eff. July 1, 2014; Acts 2017, No. 355, §1, eff. June 22, 2017; Acts 2018, No. 612, §8, eff. July 1, 2020; Acts 2019, No. 404, §16; Acts 2023, No. 291, §1.

NOTE: See Acts 2019, No. 404, §§16 and 20 regarding the repeal of certain changes made to R.S. 24:653(N)(3) in Acts 2018, No. 612.

NOTE: See Acts 2018, No. 612 and Acts 2019, No. 404 providing for the effects of the conversion of certain dedicated funds to special statutorily dedicated fund accounts.

Agenda Item #3

Review and approval of
a contract extension
between McNeese State
University and Ellucian
Company, L.P.

**REMOVED AGENDA
ITEM**

Agenda Item #4

Review and approval of
Louisiana Infrastructure
Technical Assistance
Corporation's
program guidelines



LOUISIANA **INFRASTRUCTURE TECHNICAL ASSISTANCE** CORP.

707 NORTH 7TH STREET BATON ROUGE, LOUISIANA 70802

Louisiana Infrastructure Technical Assistance Corporation

Program Administration & Drawdown Request

Submitted to:

The Joint Legislative Committee on the Budget

By:

The Louisiana Infrastructure Technical Assistance Corporation

On:

October 12, 2023

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**REQUEST FOR PROPOSALS:
TECHNICAL ASSISTANCE PROGRAM**

REQUEST FOR PROPOSALS

BY

**LOUISIANA INFRASTRUCTURE TECHNICAL
ASSISTANCE CORPORATION (LITACorp)**

RFP #: LITACorp 01-2022

**Proposal Due Date/Time:
December 16, 2022 at 5:00pm CT**

For

**GRANT APPLICATION AND GRANT
ADMINISTRATIVE SUPPORT SERVICES**

PART I: ADMINISTRATIVE AND GENERAL INFORMATION

1.1 Purpose

The purpose of this Request for Proposals (RFP) is to obtain competitive proposals from bona fide, qualified Proposers who are interested in providing a wide range of grant application and grant administration consulting services to assist local Political Subdivisions served by LITACorp. LITACorp is seeking proposals from providers of the defined consulting services to provide temporary Contract Staff for grant application and grant administration assistance and services as described in **Section 2.1 Scope of Work/Services**.

This RFP will qualify Proposers for assisting LITACorp to plan, analyze, implement, maintain and support the provision of matching funds dedicated to Louisiana Political Subdivisions who successfully acquire grants through the federal Infrastructure Investment and Jobs Act (IIJA), otherwise known as the Bipartisan Infrastructure Law (BIL). This RFP presents functional Areas as described in **Attachment II – Staffing Support Areas** of this RFP which identifies Support Areas where temporary Contract Staff may be needed by Political Subdivisions. LITACorp plans to meet this need by issuing this competitive RFP leading to the execution of multiple Staffing Support Contracts. Once these Contracts are established, LITACorp will be able to engage the Contractors to access the required personnel as directly and efficiently as possible.

1.2 Background

LITACorp is a Louisiana Non-profit Corporation that has entered a Cooperative Endeavor Agreement through the Office of the Governor, Division of Administration, as approved by the Joint Legislative Committee of the Budget. LITACorp establishes, coordinates, and implements those Matching Funds appropriated by the Louisiana State Legislature by ACT 497 of the 2022 Regular Legislative Session to assist Political Subdivisions to successfully apply and receive Infrastructure Investment and Jobs Act (IIJA) grants and to assist with State-provided matching funds where necessary or expedient.

LITACorp has the authority and responsibility as designated by the Executive Branch for qualifying and managing the professional consulting staff who will assist in the acquisition and administration of grants payable to Political Subdivisions and who will also assist in applying for Matching Funds provided through ACT 497 and administered through LITACorp.

LITACorp's mission is to implement processes designed to leverage State funds to effectuate and expedite Political Subdivisions ability to acquire Matching Funds to take advantage of IIJA grants made available to them. The mission will require a flexible means of rapidly obtaining quality personnel to provide the grant acquisition and administration

services required.

1.3 Goals and Objectives

LITACorp's goal is to have a flexible means of obtaining temporary staffing resources quickly, efficiently and cost effectively.

1.4 Term of Contract

The term of any Contract resulting from this solicitation shall be for an initial period of twelve (12) months to begin on or about January 2, 2023, to end December 31, 2023, unless otherwise terminated in accordance with termination provisions of the Contract. At the option of LITACorp (as may be approved by LITACorp) and acceptance of the Contractor, the contract may be extended for two (2) additional twelve (12) month periods at the same prices, terms, and Conditions. Total Contract time may not exceed sixty (60) months.

1.5 Definitions

Agency. Any department, commission, council, board, office, bureau, committee, institution, agency, government, or other establishment of a Parish or Municipality of Louisiana authorized to participate in any contract resulting from this RFP.

Client(s). A Political Subdivision that has applied for LITACorp assistance in acquiring technical assistance or participating in the matching funds program to support applications for IJA grants.

Contract. A legal binding agreement between LITACorp and the awarded Contractor(s).

Contractor. Any person having a contract with LITACorp or a Political Subdivision as defined. For sections of this RFP outlining required actions of a Contractor, the Contractor should be understood to refer to the successful Proposer responding to this RFP.

Contract Staff. Temporary “staff” or “personnel” assigned to work for a Political Subdivision under a binding agreement between LITACorp and the awarded Contractor.

Contractor Team Member. Any person employed by or who is a subcontractor to a Contractor, and who otherwise qualifies to perform services within a Staffing Area.

Discussions. For the purposes of this RFP, a formal, structured means of conducting written or oral communications/presentations with responsible Proposers who submit proposals in response to this RFP.

LITACorp. The non-profit corporation serving as a non-governmental organization performing government functions as directed or contracted for by the Executive Branch.

LITACorp Project Manager. The principal point of contact on behalf of LITACorp concerning Contractor's performance under a specific Task Order; Oversees all activities involved in a specific task order.

May. The term denotes an advisory or permissible action per La. R.S. 39:1556(33).

Must. The term denotes mandatory requirements.

Political Subdivision. Means a Louisiana Municipality or Parish duly organized under the Constitution and laws of Louisiana.

Proposal. A submission by the Proposer to enter into a Contract with LITACorp to supply and support the products and/or services described, in accordance with the RFP specifications.

Proposer. A firm, venture or individual who responds to this RFP. The successful Proposer responsive to this RFP is also described as the Contractor in this document.

Shall. The term denotes mandatory requirements.

Should. The term denotes a desirable action.

SOW. Statement of Work, which is provided in a Staffing Support Task Order, is a written statement prepared by LITACorp that specifically describes the phases of work or services, major tasks or areas of responsibility the Contractor is to perform during a stated period of time. Statement of Work shall identify specific objectives that the Contractor is to attain and describe in detail the deliverables that the Contractor is to provide.

Staffing Support Area. The term denotes the classification of services into several functional specific groupings.

Staffing Support Provider. The term denotes a Contractor that can offer temporary staff support in a specific Staff Support Area.

Staffing Support Task Order or Task Order. The term denotes a supplementary contractual and obligating document providing the issuances of orders for the performances of tasks during the contract period.

Subcontractor. Any third-party agency engaged by the Contractor to fulfill any of its

obligations under the contract awarded as a result of this RFP.

Staffing Support Contract. A Contract that results from this RFP.

1.6 Schedule of Events

1. RFP posted to the LACPC bid platform at <https://lamats.eauctionservices.com> and Blackout Period begins: December 2, 2022
2. Deadline to receive written inquiries: December 7, 2022 at 5:00pm CT
3. Deadline to answer written inquiries: December 9, 2022 at 5:00pm CT
4. Proposal Closing Date: December 16, 2022 at 5:00pm CT
5. Oral discussions with Proposers: December 21, 2022
6. Best and Final Offer with Proposers: December 22, 2022
7. Notice of Intent to Award to be issued to be scheduled: December 23, 2022
8. Contract Initiation to be scheduled: January 2, 2023

NOTE: LITACorp reserves the right to revise this schedule. Revisions before the Proposal Submission Deadline, if any, will be formalized by the issuance of an addendum to the RFP. Revisions after the Proposal Submission Deadline, if any, will be by written notification to the eligible Proposers.

1.7 Proposal Submittal

This RFP is available in downloadable format on the LACPC bid platform at <https://lamats.eauctionservices.com>.

It is also available in PDF format or in printed form by submitting a written request to the LITACorp Contracting Officer. Contact information for the RFP Contracting Officer is provided in **Section 1.12.2** of this RFP.

It is the Proposer's responsibility to check the LACPC bid platform at <https://lamats.eauctionservices.com> frequently for any possible addenda that may be issued. LITACorp is not responsible for a Proposer's failure to download any addenda documents required to submit a response to this Request for Proposal.

All proposals shall be received in hard copy (printed) form by LITACorp no later than the date and time shown in the **Schedule of Events**.

Important – Clearly mark the outside of any envelope, box or package with the following information and format:

Proposal Name: LITACorp Grant Application & Administration Staffing Support

File Number: LITACorp 01-2022

Proposal Closing Date and Time: December 16, 2022, at 5:00pm CT

Proposals may be mailed through the U.S. Postal Service to the LITACorp, 707 North 7th Street, Baton Rouge, LA 70802, and emailed to leslie@LITACorp.org.

If delivering by U.S. Postal Service to the address listed above, please allow sufficient time for the mail to then be transmitted to LITACorp. LITACorp must receive the proposal at its physical location by the date and time specified in **Section 1.6 Schedule of Events** of this RFP. Proposals may be delivered by hand or courier service to LITACorp's physical location at:

Leslie Anne Durham, Executive Director
LITACorp
707 N Seventh St.
Baton Rouge, LA 70802
leslie@LITACorp.org

Proposer is solely responsible for ensuring that its courier service provider makes inside deliveries to LITACorp's physical location. LITACorp is not responsible for any delays caused by the Proposer's chosen means of proposal delivery.

Proposers should be aware of any security requirements for the LITACorp building and allow time to be identified and to gain entry.

Proposer is solely responsible for the timely delivery of its proposal. Failure to meet the proposal opening date and time shall result in rejection of the proposal.

1.8 Proposal Response Format

Proposals submitted for consideration should follow the format, order of presentation and address each of the requirements described in this RFP. Proposals should be clear, concise, and responsive to all requirements and instructions.

Proposers may submit a proposal for any or all of the listed Staffing Support Areas. It is permissible to submit one (1) proposal for multiple Staffing Support Areas. When

responding to multiple Staffing Support Areas within a single proposal, the information requested in Section **2.5.2.1** Mandatory Requirements must be provided for each Staffing Support Area being proposed. The information requested in **Tab 4 Proposed Staffing Support** shall be provided for each Staffing Support Area being proposed. Each Staffing Support Area proposed will be scored separately and independently.

The Financial proposal should be packaged and labeled separately from the Technical Proposal. Financial Proposal information must meet all the requirements in **Section 1.8.2 Financial Proposal**.

1.8.1 Technical Proposal

The format and sections of the Technical Proposal should conform to the tabbed structure outlined below. All tabs should be labeled appropriately. Adherence to this format is necessary in order to permit the effective evaluation of proposals.

Technical Proposal Content Checklist

- Title Page
- Cover Letter
- Table of Contents
- TAB 1 – Executive Summary
- TAB 2 – Proposer and Subcontractor(s) Corporate Information
- TAB 3 – Certification Statement
- TAB 4 – Proposed Staffing Support
- Attachment 1: Optional Marketing Materials
- Attachment 2: Contract Edits

The following sections explain the content that is required in each section of the Technical Proposal.

A. Title Page

The Title Page should be placed as the front cover and/or insert and should include:

1. Title of the RFP
2. RFP due date
3. Proposer's name
4. The inscription "Technical Proposal"
5. Staffing Support Area(s) being proposed

B. Cover Letter

Cover Letter: The cover letter should be submitted on the Proposer's official business letterhead and should exhibit the Proposer's understanding and approach to the project. The Cover Letter should contain a summary of Proposer's ability to perform the services described in the RFP and confirm that Proposer is willing to perform those services and enter into a contract with LITACorp.

ATTENTION: Please indicate in the Cover Letter which of the following applies to the signer of the proposal. Evidence of signature authority shall be provided upon LITACorp's request.

1. The signer of the proposal is either a corporate officer who is listed on the most current annual report on file with the Secretary of State or a member of a partnership or partnership in commendam as reflected in the most current partnership records on file with the Secretary of State. A copy of the annual report or partnership record must be submitted to the LITACorp before contract award.

2. The signer of the proposal is a representative of the Proposer authorized to submit the proposal as evidenced by documents such as, corporate resolution, certification as to corporate principal, etc. If this applies a copy of the resolution, certification or other supportive documents should be attached to the Cover Letter.

3. The Proposer has filed with the Secretary of State an affidavit or resolution or other acknowledged/authentic document indicating that the signer is authorized to submit proposals for public contracts. A copy of the applicable document must be submitted to the LITACorp before contract award.

4. The signer of the proposal has been designated by the Proposer as authorized to submit proposals on their behalf.

The cover letter should also:

- * Identify the submitting Proposer and provide their federal tax identification number.
- * Identify the name, title, address, telephone number, fax number, and email address of each person authorized by the Proposer to contractually obligate the Proposer.
- * Identify the name, title, address, telephone number, fax number, and email address of the person who will function as the primary contact for the Proposer.
- * Identify the name, address, telephone number, fax number, and email address of the contact person for technical and contractual clarifications throughout the evaluation period.

C. Table of Contents

Each proposal should be submitted with a table of contents that clearly identifies and denotes the location of each section and sub-section of the proposal. Each page of the response should be clearly and uniquely numbered. Additionally, the table of contents should clearly identify and denote the location of all enclosures and attachments to the proposal.

D. TAB 1 – Executive Summary

The Proposer should condense and highlight the contents of the Technical Proposal in this section. The Executive Summary should provide a concise summary of the qualifications presented to meet LITACorp's requirements.

E. TAB 2 – Proposer and Subcontractor(s) Corporate Information

This section should include the following subsections related to the Proposer:

Company Overview

In this section, a Proposer should describe its business operations such as the year founded; brief history of the company; current size in terms of staff, revenue, and profit; and principal owners/officers of the company. The history should discuss sales growth, areas of focus, and other information that would demonstrate financial strength, integrity, experience, industry focus, and government experience providing Consulting Staff Support services, with an emphasis on services provided in Louisiana.

Financial Strength

The Proposer should provide details regarding its total annual revenue, profit and cash flow, including audited financial statements for the past three (3) years. Proposer should submit the most recent Dun & Bradstreet (D&B) Business Information Report™ for the firm. Submission of the D&B Number without the full report is insufficient. If the Proposer is not registered with D&B, Proposer may submit three (3) current written, positive credit references, in the form of signed and dated standard business letters from clients with which the Proposer has done business in the past five (5) years.

Integrity

Proposer should discuss the reasons why it feels the organization and the individuals within the organization are of high integrity and operate in a culture of high integrity. Proposer should highlight those points that would demonstrate the organization's

integrity.

Proposer should provide a statement of whether the firm or any individual who will perform work under the Contract has a possible conflict of interest (e.g., employment by LITACorp) and, if so, the nature of the conflict. Proposer should provide a statement of whether, in the last ten (10) years, the firm has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or has undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.

Proposer Experience

Proposer should discuss its commitment to the RFP framework and any related IJA processes. This should be followed by a summary of Proposer's experience in providing federal grant staffing support. The information provided should include the following details for at least five (5) engagements: the grant program involved, number of staff provided, type of government agency, grant size or budget involved, and duration of engagement. Additionally, the Proposer must provide a list of grant applications that were applied for and awarded over the past three years, including the federal agency, program name, funding amount received, and year of award.

Staffing Support Resources

Proposer should describe the total size of its workforce and revenue, as well as the number and types of staff placed with public sector clients and revenue generated from public sector clients. Proposer should address its commitment to employee training and to encouraging certification/qualification at the individual level in technical specialties.

Subcontractor Company Overview

The Proposer should list all subcontractors and describe business operations such as the year founded; brief history of the company; current size in terms of staff, revenue, and profit; and principal owners/officers of the company. The history should discuss sales growth, areas of focus, and other information that would demonstrate financial strength, integrity, experience, industry focus, and government experience providing Staff Support services in the RFP Staffing Areas described herein.

Subcontractor Background History

Proposer should describe each subcontractor's business operations and provide a brief history of the company, discussing sales growth, areas of focus, and other information that would demonstrate financial strength, integrity, experience, and industry focus. In addition, Proposer should describe subcontractor's experience in providing Staffing

Support, including types of Political Subdivision projects supported, staff available for assignment and types of government projects served.

Subcontractor Financial Strength

Proposer should provide evidence that each subcontractor has the financial capacity to provide its portion of the offered services. The Proposer should provide details regarding each subcontractor's total annual revenue, profit and cash flow, including audited financial statements for the past three (3) years. The financial statements should include an income statement and balance sheet, and preferably a cash flow statement for each of the three (3) years.

Subcontractor Contact Information

Proposer should provide the name, address, telephone number, fax number, and email address of the contact person for each subcontractor.

F. TAB 3 – Certification Statement

The Proposer shall sign and submit one (1) original Certification Statement (see **Attachment V**) and all information required by the Certification as part of the proposal submission.

G. TAB 4 – Proposed Staffing Support

Proposer shall address its approach to the Staffing Support Areas being proposed. This section should provide LITACorp with an understanding of how Proposer ensures that the work performed by its resources is of the highest quality.

Proposers shall clearly describe their capacity for providing the types and numbers of resources in the staffing support areas being proposed that may be required at any time over the life of the resulting engagements. Proposers shall include:

The size of its current workforce; the methodology used to identify, recruit and acquire additional resources that may be required to augment its current staff; its ability to rapidly provide qualified candidates; its methodology for developing, motivating, rewarding and retaining a well-trained, highly qualified workforce; its capabilities to meet sourcing requirements that may arise in the future which might involve technology LITACorp does not currently own and may not be aware of at the present time.

Proposer may also include a statement of its ability to commit key personnel for the full term of the contract and its plan for doing so.

I. Attachment 1 – Optional Marketing Materials

Proposer may place no more than two (2) pages of marketing materials per Staffing Support area in Attachment 1 in the hard copy proposal. Electronic copies of additional (optional) marketing materials may be placed in this section on the Technical Proposal USB flash drive.

J. Attachment 2 – Contract Edits

Proposer should review **Attachment VI: Sample Generic Contract of this RFP** and provide any proposed changes to the documents in this section. Proposer may either reference the section of the Contract and provide only the old and new verbiage in this section or may place the entire Contract in this section with proposed changes highlighted. In no event should a Proposer submit its own standard contract terms and Conditions as a response to this RFP.

The Proposer should submit with its proposal any exceptions or specific Contract or Task Order deviations that its firm wishes to negotiate. Negotiations may begin with the announcement of the selected Proposer(s). The proposal should include a positive statement of acceptance of contract terms and Conditions if no changes are required.

Mandatory contract terms have been identified in **Section 1.24** of this RFP. Proposer shall accept those terms in their entirety.

1.8.2 Financial Proposal

The format and sections of the Financial Proposal should conform to the tabbed structure outlined below. All tabs should be labeled appropriately. Adherence to this format is necessary to permit effective evaluation of proposals.

Financial Proposal Content

1. Title Page
2. Table of Contents
3. TAB 1 – Executive Summary
4. TAB 2 – Hourly Rate Table

All project assumptions should be placed in the Technical Proposal. The following sections explain the content required in each section of the Financial Proposal.

A. Title Page

The Title page should be placed as the front cover and/or insert, and should include:

1. Title of the RFP
2. RFP due date
3. Proposer's name
4. The inscription, "Financial Proposal"
5. Staffing Support Area(s) being proposed

B. Table of Contents

Each Financial Proposal should be submitted with a table of contents that clearly identifies and denotes the location of each section and sub-section of the proposal. Each page of the response should be clearly and uniquely numbered. Additionally, the table of contents should clearly identify and denote the location of all enclosures and attachments to the proposal.

C. TAB 1 – Executive Summary

Proposer should provide an overview of the Financial Proposal which describes any pricing approaches and discounts.

D. TAB 2 – Hourly Rate Table

Proposers shall complete **Attachment III: Hourly Rate Table** of this RFP by Staffing Support Area to offer rates for each of the Staffing Support Areas being proposed. To be eligible for an award in a Staffing Support Area, Proposer must include hourly rates for all Job Titles listed in that Staffing Support Area.

In providing hourly rates, Proposers should consider the varying skills and experience of staff which they may offer during the period of performance. Hourly rates proposed must be agreed to in the Staffing Support Contract.

Any anticipated travel or other expenses required to meet the RFP requirements must be included in proposed hourly rates.

Proposers shall complete the Hourly Rate Table as follows:

1. Do not change the formatting of any cell.
2. Enter Proposer's name on the first line, where indicated as "Please Enter Proposer Name:".
3. For each Job Title in the Table, enter an On-site Facility rate in Column labeled "On-site Facility", and a Contractor Remote Facility rate in Column labeled "Contractor Remote

Facility”.

1.9 Number of Response Copies

Each Proposer shall submit one (1) signed original response.

Each Proposer should submit the following:

Five (5) additional copies of the Technical Proposal

Two (2) additional copies of the Financial Proposal

One (1) redacted copy of proposal, if applicable (See **Section 1.11** of this RFP)

One (1) “searchable” electronic copy of the technical and financial proposals on two (2) separate USB flash drives

One (1) electronic redacted copy of proposal on a USB flash drive, if applicable (See Section 1.11 of this RFP)

1.10 Legibility/Clarity

Responses to the requirements of this RFP in the formats requested are desirable with all questions answered in as much detail as practicable. The Proposer’s response is to demonstrate an understanding of the requirements. Proposals prepared simply and economically, providing a straightforward, concise description of the Proposer’s ability to meet the requirements of the RFP is also desired. Each Proposer is solely responsible for the accuracy and completeness of its proposal.

1.11 Confidential Information, Trade Secrets, and Proprietary Information

The designation of certain information as trade secrets and/or privileged or confidential proprietary information shall only apply to the technical portion of the proposal. The Financial Proposal will not be considered confidential under any circumstance. Any proposal copyrighted or marked as confidential or proprietary may be rejected without further consideration or recourse.

For this procurement's purposes, the Louisiana Public Records Act (La. R.S. 44.1 et.) seq.) shall be in effect. Pursuant to this Act, all proceedings, records, contracts, and other public documents relating to this procurement shall be open to public inspection. Proposers are reminded that while trade secrets and other proprietary information they submit in conjunction with this procurement may not be subject to public disclosure, protections must be claimed by the Proposer at the time of submission of its Technical Proposal. Proposers should refer to the Louisiana Public Records Act for further clarification.

The Proposer shall clearly designate the part of the proposal that contains a trade secret

and/or privileged or confidential proprietary information as “confidential” in order to claim protection, if any, from disclosure. The Proposer shall mark the cover sheet of the proposal with the following legend, specifying the specific section(s) of the proposal sought to be restricted in accordance with the Conditions of the legend:

“The data contained in pages _____ of the proposal have been submitted in confidence and contain trade secrets and/or privileged or confidential information and such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Proposer as a result of or in connection with the submission of this proposal, LITACorp shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit LITACorp’s right to use or disclose data obtained from any source, including the Proposer, without restrictions.”

Further, to protect such data, each page containing such data shall be specifically identified and marked “CONFIDENTIAL”. If the Proposer’s response contains confidential information, the Proposer should also submit a redacted copy of their proposal along with their original proposal. When submitting the redacted copy, the Proposer should clearly mark the cover as such - “REDACTED COPY” - to avoid having this copy reviewed by an evaluation committee member. The redacted copy should also state which sections or information has been removed. The proposer should also submit one (1) electronic redacted copy of its proposal on a USB flash drive. The redacted copy of the proposal will be the copy produced by LITACorp if a competing proposer or other person seeks review or copies of the Proposer’s confidential data. If the Proposer does not submit the redacted copy, it will be assumed that any claim to keep information confidential is waived.

Proposers must be prepared to defend the reasons why the material should be held confidential. By submitting a proposal with data, information, or material designated as containing trade secrets and/or privileged or confidential proprietary information, or otherwise designated as “confidential”, the Proposer agrees to indemnify and defend (including attorney’s fees) LITACorp and hold harmless LITACorp against all actions or court proceedings that may ensue which seek to order LITACorp to disclose the information.

LITACorp reserves the right to make any proposal, including proprietary information contained therein, available to State of Louisiana, the Office of the Governor, or other State Agencies or organizations for the sole purpose of assisting in the evaluation of the proposal. LITACorp shall require said individuals to protect the confidentiality of any specifically identified proprietary information or privileged business information obtained as a result of their participation in these evaluations.

Additionally, any proposal that fails to follow this section and/or La. R.S. 44:3.2.(D)(1) shall have failed to properly assert the designation of trade secrets and/or privileged or

confidential proprietary information and the information may be considered public records.

1.12 Proposal Clarifications Prior to submittal

1.12.1 Pre-Proposal Conference

NOT REQUIRED FOR THIS RFP

1.12.2 Proposer Inquiry Periods

LITACorp expects and requires responsible and interested Proposers to conduct their in-depth proposal review and submit inquiries promptly.

An inquiry period is hereby firmly set for all interested Proposers to perform a detailed review of the RFP documents and to submit any written inquiries relative thereto. Without exception, all inquiries **MUST** be submitted in writing by an authorized representative of the Proposer, clearly cross-referenced to the relevant solicitation section. All inquiries must be received by the Inquiry Deadline date set forth in **Section 1.6 Schedule of Events** of this RFP. Only those inquiries received by the established deadline shall be considered. Inquiries received after the established deadline shall not be entertained. Inquiries concerning this solicitation shall be delivered to LITACorp's Executive Director for this RFP,

Leslie Durham, by mail, express courier, hand, or email:
707 North 7th Street
Baton Rouge, LA 70802
leslie@LITACorp.org

Only the person identified above, or her designee has the authority to officially respond to Proposer's questions on behalf of LITACorp, including during the Blackout Period. Any communications from any other individuals are not binding. An addendum will be issued and posted at the LACPC bid platform at <https://lamats.eauctionservices.com>, to address all inquiries received and any other changes or clarifications to the solicitation.

Thereafter, all RFP documents, including the specifications, terms, conditions, plans, etc., will stand as written and/or amended by any addendum. No negotiations, decisions, or actions shall be executed by any Proposer due to oral discussions with any LITACorp employee or consultant. It is the Proposer's responsibility to check the LaPAC website frequently for any possible addenda that may be issued. LITACorp is not responsible for a Proposer's failure to download any addenda documents required to complete a Request for Proposals.

Any person aggrieved in connection with the solicitation, or the specifications contained

therein, has the right to protest in accordance with La. R.S. 39:1671. Such protest shall be made in writing to the Executive Director of LITACorp at least two (2) days prior to the deadline for submitting proposals.

1.12.3 Blackout Period

The Blackout Period is a specified period of time during a competitive sealed procurement process in which any Proposer, Bidder, or its Agent or Representative, is prohibited from communicating with any State employee or Contractor of LITACorp involved in any step in the procurement process about the affected procurement. The Blackout Period applies to LITACorp employees and to any Contractor of LITACorp. "Involvement" in the procurement process includes but may not be limited to project management, design, development, implementation, procurement management, development of specifications, and evaluation of proposals for a particular procurement. All solicitations for competitive sealed procurements will identify a designated contact person, as per Section 1.12.2 of this RFP. All communications to and from potential Proposers, Bidders, Vendors and/or their representatives during the Blackout Period must be in accordance with this solicitation's defined method of communication with the designated contact person. The Blackout Period will begin December 7, 2022. The Blackout Period will end when the contract is awarded.

In those instances, in which a prospective Proposer is also an incumbent Contractor, LITACorp and the incumbent Contractor may contact each other with respect to the existing contract only. Under no circumstances may LITACorp and the incumbent Contractor and/or its representative(s) discuss the blacked-out procurement. Any Bidder, Proposer, or LITACorp Contractor who violates the Blackout Period may be liable to LITACorp in damages and/or subject to any other remedy allowed by law. Further, failure to comply with these requirements may result in the Proposal's disqualification.

Any costs associated with cancellation or termination will be the responsibility of the Proposer or Bidder. Notwithstanding the foregoing, the Blackout Period shall not apply to:

1. A protest to a solicitation submitted pursuant to La. R.S. 39:1671;
2. Duly noticed site visits and/or conferences for Bidders or Proposers;
3. Oral presentations during the evaluation process; or
4. Communications regarding a particular solicitation between any person and staff of the procuring agency provided the communication is limited strictly to matters of procedure. Procedural matters include deadlines for decisions or submission of proposals and the proper means of communicating regarding the procurement but shall not include any substantive matter related to the particular procurement or requirements of the RFP.

1.13 Errors and Omissions in Proposal

LITACorp will not be liable for any errors or omissions in the proposal. Proposer will not be allowed to alter proposal documents after the deadline for proposal submission, except under the following condition: LITACorp reserves the right to make corrections or clarifications due to patent errors identified in proposals by LITACorp or the Proposer.

LITACorp reserves the right to seek clarification from Proposers where deemed appropriate to understand the intent of certain points in one or more proposals. Any such clarification request and response will be provided in writing and maintained as part of the documentation for the respective proposal. Proposers must respond to requests for clarification within two (2) working days of request. Failure to do so may affect the Proposer's score or result in rejection of its proposal.

1.14 Proposal Guarantee

NOT REQUIRED FOR THIS RFP

1.15 Performance Bond

NOT REQUIRED FOR THIS RFP

1.16 Fidelity Bond Requirements

NOT REQUIRED FOR THIS RFP

1.17 Changes, Addenda, withdrawals

LITACorp reserves the right to change the Schedule of Events or issue Addenda to the RFP at any time. LITACorp also reserves the right to cancel or reissue the RFP. If the Proposer needs to submit changes or addenda, such shall be submitted in writing, signed by an authorized representative of the Proposer, cross-referenced clearly to the relevant proposal section, prior to the proposal opening, and should be submitted in a sealed envelope. Such shall meet all requirements for the proposal.

1.18 Withdrawal of Proposal

A Proposer may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To accomplish this, a written request signed by the authorized representative of the Proposer must be submitted to LITACorp .

1.19 Material in the RFP

Proposals shall be based only on the material contained in this RFP. The RFP includes official responses to questions, addenda, and other material, which may be provided by

LITACorp pursuant to the RFP.

1.20 Waiver of Administrative Informalities

LITACorp reserves the right, at its sole discretion, to waive administrative formalities contained in any proposal.

1.21 Proposal Rejection

Issuance of this RFP in no way constitutes a commitment by LITACorp to award a Contract. LITACorp reserves the right to accept or reject any or all proposals submitted or to cancel this RFP if it is in the best interest of LITACorp to do so. Further, LITACorp reserves the right to cancel or decline to enter into a Contract with the successful Proposer at any time after the award is made and before the Contract receives final approval from LITACorp.

In accordance with the provisions of La. R.S. 39:2192, in awarding Contracts after August 15, 2010, any public agency is authorized to reject a proposal or bid from, or not award the Contract to, a business in which any individual with an ownership interest of five percent or more, has been convicted of, or has entered a plea of guilty or nolo contendere to any State felony or equivalent federal felony crime committed in the solicitation or execution of a Contract or bid awarded under the laws governing public contracts under the provisions of Chapter 10 of Title 38 of the Louisiana Revised Statutes of 1950, or the Louisiana Procurement Code under the provisions of Chapter 17 of Title 39.

In accordance with Louisiana law, all corporations (see La. R.S. 12:262.1) and limited liability companies (see La. R.S. 12:1308.2) must be registered and in good standing with the Louisiana Secretary of State in order to hold a purchase order and/or a Contract with LITACorp.

1.22 Ownership of Proposal

All materials submitted in response to this request become the property of LITACorp. Selection or rejection of a response does not affect this right. All proposals submitted will be retained by LITACorp and not returned to Proposers. Any copyrighted materials in the response are not transferred to LITACorp.

1.23 Cost of Offer Preparation

LITACorp is not liable for any costs incurred by prospective Proposers or Contractors prior to issuance of or entering into a Contract. Costs associated with developing the proposal, preparing for oral presentations, and any other expenses incurred by the Proposer in responding to the RFP are entirely the responsibility of the Proposer, and

shall not be reimbursed in any manner by LITACorp.

1.24 Non-negotiable Contract Terms

Non-negotiable Contract terms include but are not limited to taxes, assignment of Contract, audit of records, EEOC and ADA compliance, record retention, content of Contract/order of precedence, Contract changes, governing law, claims or controversies, and termination based on contingency of appropriation of funds.

1.25 Taxes

Any taxes, other than State and local sales and use taxes, from which LITACorp is exempt, shall be assumed to be included within the Proposer's cost.

1.26 Proposal Validity

All proposals shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal response. However, LITACorp reserves the right to reject a proposal if the Proposer's acceptance period is unacceptable and the Proposer is unwilling to extend the validity of its proposal.

1.27 Prime Contractor responsibilities

The selected Proposer shall be required to assume responsibility for all items and services offered in their proposal whether or not they produce or provide them. LITACorp shall consider the selected Proposer to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the Contract.

1.28 Use of Subcontractors

Each Contractor shall serve as the single prime Contractor for all work performed pursuant to its Contract. That prime Contractor shall be responsible for all deliverables referenced in this RFP. This general requirement notwithstanding, Proposers may enter into subcontractor arrangements. Proposers may submit a proposal in response to this RFP, which identifies subcontract(s) with others, provided that the prime Contractor acknowledges total responsibility for the entire Contract.

If it becomes necessary for the prime Contractor to use subcontractors, LITACorp urges the prime Contractor to use Louisiana vendors, including small and emerging businesses, a small entrepreneurship or a veteran or service-connected disabled veteran-owned small entrepreneurship, if practical. In all events, any subcontractor used by the prime should be identified to the LITACorp Project Manager. Information required of the prime Contractor under the terms of this RFP, is also required for each subcontractor and the

subcontractors must agree to be bound by the terms of the Contract. The prime Contractor shall assume total responsibility for compliance.

1.29 Written or Oral Discussions/Presentations

LITACorp, at its sole discretion, may require all Proposers who submit proposals determined to be reasonably susceptible of being selected for the award to provide an oral presentation of how they propose to meet the agency's objectives; however, LITACorp reserves the right to enter into an Agreement without further discussion of the proposal submitted based on the initial offers received.

Any commitments or representations made by the Proposer during these discussions, if conducted, may become formally recorded in the final Contract.

Written or oral discussions/presentations for clarification may be conducted to enhance LITACorp's understanding of any or all of the proposals submitted. Proposals may be accepted without such discussions. LITACorp reserves the right to adjust the original scores based upon information received in the discussions/presentations, using the original evaluation criteria.

1.30 Acceptance of Proposal Content

The mandatory RFP requirements shall become contractual obligations if a Contract ensues. Failure of the successful Proposer to accept these obligations shall result in the rejection of the proposal.

1.31 Independent Price Determination

By submitting a proposal, the Proposer certifies that the price submitted was independently arrived at without collusion.

1.32 Evaluation and Selection

All responses received as a result of this RFP are subject to evaluation by the LITACorp Evaluation Committee for the purpose of selecting the Proposer(s) with whom LITACorp shall Contract. For each Staffing Support Area, an Evaluation Committee has been selected whose members have expertise in various areas. A consensus-based evaluation process shall be used to evaluate responses. This committee will determine which proposals are reasonably susceptible of being selected for award. If required, written or oral discussions may be conducted with any or all of the Proposers to make this determination.

The LITACorp Evaluation Committee may consult Subject Matter Expert(s) (SMEs) to

serve in an advisory capacity regarding any Proposer or Proposal. Such input may include, but not limited to, analysis of Proposer financial statements, review of technical requirements, or preparation of financial score data.

Written recommendation for award shall be made to the Executive Director of LITACorp for the responsible Proposer(s) whose proposal, conforming to the RFP, will be the most advantageous to LITACorp, price and other factors considered. LITACorp may award multiple contracts in each Staffing Support Area. The committee may reject any or all proposals if it is considered in the best interest of LITACorp.

1.33 Best and Final Offers (BAFO)

LITACorp reserves the right to conduct a BAFO with any Proposer determined by the committee to be reasonably susceptible of being selected for award. If conducted, the Proposer selected to participate will receive written notification of their selection, with a list of specific items to be addressed in the BAFO along with instructions for submittal. The BAFO negotiation may be used to assist LITACorp in clarifying the scope of work or to obtain the most cost-effective pricing available from the Proposer. The written invitation will not obligate LITACorp to a commitment to enter into a Contract.

1.34 Contract Negotiations

If for any reason, after final evaluation and issuance of the Intent to Award letter, the responsible Proposer whose proposal is most advantageous to LITACorp's needs, price and other evaluation factors set forth in the RFP considered, does not agree to a Contract, that proposal shall be rejected and LITACorp may negotiate with the next most advantageous responsible Proposer.

Negotiation may include revision of any non-mandatory terms or Conditions, and clarification of the scope of work and/or implementation of the most cost-effective pricing available from the Proposers. LITACorp must approve the final Contract form and issue a purchase order, if applicable, to complete the process.

1.35 Contract Award and Execution

LITACorp reserves the right to enter into a Contract without further discussion of the proposal submitted based on the offers received in this process. Further, LITACorp reserves the right to cancel or decline to enter into a Contract with the successful Proposer(s) at any time after the award is made. .

The RFP, including any addenda, and the proposal of the selected Contractor(s) will become part of any Contract initiated by LITACorp. Proposer should review **Attachment VI: Sample Generic Contract** of this RFP and provide any proposed changes to the

documents in this section. Proposer may either reference the section of the Contract and provide only the old and new verbiage in this section, or may place the entire Contract in this section with proposed changes highlighted. In no event should a Proposer submit its own standard contract terms and Conditions as a response to this RFP.

The Proposer should submit with its proposal any exceptions or specific Contract or Task Order deviations that its firm wishes to negotiate. Negotiations may begin with the announcement of the selected Proposer(s). The proposal should include a positive statement of acceptance of contract terms and Conditions if no changes are required. Mandatory contract terms have been identified in **Section 1.24** of this RFP.

Proposer shall accept those terms in their entirety. If applicable, a Proposer may submit or refer to a Master Agreement entered into by the Contractor and LITACorp in accordance with La. R.S. 39:198(J). If the Contract negotiation period exceeds thirty (30) days or if the selected Proposer(s) fail to sign the Contract within seven (7) calendar days of delivery of Contract, LITACorp may elect to cancel the award.

LITACorp may make multiple awards in each Staffing Support Area. Proposer(s) who have met the minimum TOTAL points required will be considered for selection in a Staffing Support Area.

1.36 Notice of Intent to Award

Upon review and approval of the Evaluation Committee's and Agency's recommendation for award, LITACorp will issue a "Notice of Intent to Award" letter to the apparent successful Proposer(s). The "Notice of Intent to Award" letter is the notification of the award of the Contract. However, the "Notice of Intent to Award" is contingent upon successful negotiation of a final Contract and approval by LITACorp. A Contract shall be completed and signed by all parties concerned on or before the date indicated in the "Schedule of Events." If this date is not met, through no fault of LITACorp, LITACorp may elect to cancel the "Notice of Intent to Award" letter.

LITACorp will also notify all unsuccessful Proposers as to the outcome of the evaluation process. The proposals received (except for that information appropriately designated as confidential in accordance with La. R.S. 44.1 et. seq.) along with the evaluation factors, points, Evaluation Committee member names, and the completed evaluation summary and recommendation report are public record and shall be made available, upon request, to all interested parties after the "Notice of Intent to Award" letter has been issued. Any person aggrieved by the proposed award has the right to submit a protest in writing, in accordance with La. R.S. 39:1671, to the Executive Director of LITACorp, within fourteen (14) days of the award/intent to award. The "Notice of Intent to Award" letter starts the protest period.

1.37 Debriefings

Debriefings may be scheduled by the participating Proposers after the “Notice of Intent to Award” letter has been issued by scheduling an appointment with LITACorp.

Contact may be made by phone at 318-680-7387 or E-mail to leslie@litacorp.org.

1.38 Insurance Requirements

Contractor shall furnish LITACorp with certificates of insurance affecting coverage(s) required by this RFP in accordance with **Attachment VII: Insurance Requirements for Contractors** of this RFP. The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The certificates are to be received and approved by LITACorp before work commences. LITACorp reserves the right to require complete certified copies of all required policies, at any time. The Contractor shall maintain the insurance as shown in **Attachment VII: Insurance Requirements for Contractors** of this RFP for the full term of the Contract. Failure to comply shall be grounds for termination of the Contract.

1.39 Subcontractor Insurance

The Contractor shall include all subcontractors as insured under its policies or shall ensure that all subcontractors satisfy the same insurance requirements stated herein for the Contractor.

1.40 Indemnification and Limitation of Liability

Neither party shall be liable for any delay or failure in performance beyond its control resulting from acts of God or force of nature. The parties shall use reasonable efforts to eliminate or minimize the effect of such events when performing their respective duties under the Contract.

Contractor shall be fully liable for the actions of its agents, employees, partners or subcontractors and shall fully defend, indemnify and hold harmless LITACorp from suits, actions, damages and costs of every name and description relating to personal injury and damage to property caused by Contractor, its agents, employees, partners or subcontractors in the performance of the Contract, without limitation; provided, however, that the Contractor shall not indemnify for that portion of any claim, loss or damage arising hereunder due to the negligent act or failure to act by LITACorp.

Contractor will indemnify, defend and hold harmless LITACorp, without limitation, from and against any and all damages, expenses (including reasonable attorneys' fees), claims judgments, liabilities and costs which may be finally assessed against LITACorp

in any action for infringement of a United States Letter Patent with respect to the Products, Materials, or Services furnished, or of any copyright, trademark, trade secret or intellectual property right, provided that LITACorp shall give the Contractor: (i) prompt written notice of any action, claim or threat of infringement suit, or other suit, (ii) the opportunity to take over, settle or defend such action, claim or suit at Contractor's sole expense, and (iii) assistance in the defense of any such action at the expense of the Contractor. Where a dispute or claim arises relative to a real or anticipated infringement, LITACorp may require Contractor, at its sole expense, to submit such information and documentation, including formal patent attorney opinions, as the Commissioner of Administration shall require.

The Contractor shall not be obligated to indemnify that portion of a claim or dispute based upon:

- (i) LITACorp's unauthorized modification or alteration of a Product, Material, or Service;
- (ii) LITACorp's use of the Product, Material, or Service in combination with other products, materials, or services not furnished by Contractor; (iii) LITACorp's use in other than the specified operating Conditions and environment.

In addition to the foregoing, if the use of any item(s) or part(s) thereof shall be enjoined for any reason or if Contractor believes that it may be enjoined, Contractor shall have the right, at its own expense and sole discretion as LITACorp's exclusive remedy to take action no later than six (6) months after the issuance of an injunction in the following order of precedence: (i) to procure for LITACorp the right to continue using such item(s) or part(s) thereof, as applicable; (ii) to modify the component so that it becomes non-infringing equipment of at least equal quality and performance; or (iii) to replace said item(s) or part(s) thereof, as applicable, with non-infringing components of at least equal quality and performance, or (iv) if none of the foregoing is commercially reasonable, then provide monetary compensation to LITACorp up to the dollar amount of the Contract. Any injunction that is issued against LITACorp which prevents LITACorp from utilizing the Contractor's product in excess of six (6) months and for which the Contractor has not obtained for LITACorp or provided to LITACorp one of the alternatives set forth in the foregoing sentence is cause for LITACorp to terminate the Contract. In the event of such termination, LITACorp will not be obligated to compensate the Contractor for any costs incurred by the Contractor.

For all other claims against the Contractor where liability is not otherwise set forth in the Contract as being "without limitation", and regardless of the basis on which the claim is made, Contractor's liability for direct damages, shall be the greater of \$100,000, the dollar amount of the Contract, or two (2) times the charges for products, materials, or services rendered by the Contractor under the Contract. Unless otherwise specifically enumerated herein mutually agreed between the parties, neither party shall be liable to the other for special, indirect or consequential damages, including lost data or records (unless the

Contractor is required to back up the data or records as part of the work plan), even if the party has been advised of the possibility of such damages. Neither party shall be liable for lost profits, lost revenue or lost institutional operating savings.

LITACorp may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor, or may proceed against the performance and payment bond, if any, as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against them.

1.41 Payment

1.41.1 Payment for Services

A Contractor awarded a Staffing Support Task Order shall invoice LITACorp directly and payment shall be made by LITACorp directly to the Contractor in accordance with the payment terms agreed to in the Staffing Support Task Order. In no event shall LITACorp be liable for payments on behalf of any State Agency other than itself.

Payments will be made after receipt of a properly executed invoice approved by the Agency for submittal. Invoices shall include, but not be limited to, the contract and purchase order number, using Agency department and services/product. Invoices submitted without the referenced documentation will not be approved for payment until the required information is provided.

1.41.2 Late Payments

Interest due by a State Agency for late payments shall be in accordance with La. R.S. 39:1695 at the rates established in La. R.S. 13:4202.

1.41.3 Electronic Vendor Payment Solutions

LITACorp desires to make payment to the awarded Contractor(s) electronically. The methods of payment may be via EFT payments sent directly from LITACorp's bank directly to the payee's bank. Please see **Attachment VIII: Electronic Vendor Payment Solutions** for additional information regarding electronic payment methods.

1.42 Termination

LITACorp has the right to terminate the Contract immediately for any of the following reasons: (a) misrepresentation by the Contractor; (b) Contractor's fraud, collusion, conspiracy or other unlawful means of obtaining any Contract with LITACorp; (c) conflict of Contract provisions with Constitutional or statutory provisions of State or Federal Law; (d) abusive or belligerent conduct by the Contractor towards an employee or agent of

LITACorp, or any Political Subdivision served by Contractor; (e) Contractor's intentional violation of the Louisiana Procurement Code (La. R.S. 39:1551 et seq.) and its corresponding regulations; or, (f) any listed reason for debarment under La. R.S. 39:1672.

1.42.1 Termination of the Contract for Cause

LITACorp may terminate the Contract for cause based upon the failure of the Contractor to comply with the terms and/or Conditions of the Contract, or failure to fulfill its performance obligations pursuant to the Contract, provided that LITACorp shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) days after receipt of such notice, the Contractor shall not have corrected such failure or, in the case of failure which cannot be corrected in thirty (30) days, begun in good faith to correct such failure and thereafter proceeded diligently to complete such correction, then LITACorp may, at its option, place the Contractor in default and the Contract shall terminate on the date specified in such notice.

The Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of LITACorp to comply with the terms and Conditions of the Contract, provided that the Contractor shall give LITACorp written notice specifying LITACorp's failure and a reasonable opportunity for LITACorp to cure the defect.

1.42.2 Termination of the Contract for Convenience

LITACorp may terminate the Contract for convenience at any time (1) by giving thirty (30) days written notice to the Contractor of such termination; or (2) by negotiating with the Contractor an effective date. LITACorp shall pay the Contractor for, if applicable: (a) deliverables in progress; (b) the percentage that has been completed satisfactorily; and, (c) for transaction based services up to the date of termination, to the extent work has been performed satisfactorily.

1.42.3 Termination for Non-Appropriation of Funds

The continuance of the Contract is contingent upon the appropriation of funds to fulfill the requirements of the Contract by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of the Contract, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act or Title 39 of the Louisiana Revised Statutes of 1950 to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the Contract, the Contract shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

1.43 Assignment

The Contractor shall not assign any interest in the Contract by assignment, transfer, or novation, without prior written consent of LITACorp. This provision shall not be construed to prohibit the Contractor from assigning their bank, trust company, or other financial institution any money due or to become due from approved Contracts without such prior written consent. Notice of any such assignment or transfer shall be furnished promptly to LITACorp.

1.44 No Guarantee of Quantities

LITACorp reserves the right to increase/decrease the number of temporary Consulting Staff utilized as project requirements change. Neither LITACorp nor Agency obligates itself to Contract for or accept more than their actual requirements during the period of the Contract, as determined by actual needs and availability of appropriated funds.

1.45 Audit of Records

LITACorp auditors or, federal auditors, or others so designated by LITACorp, shall have the option to audit all accounts directly pertaining to the resulting Contract for a period of five (5) years from the date of final payment or as required by applicable State and Federal law. Records shall be made available during normal working hours for this purpose.

1.46 Civil Rights Compliance

The Contractor agrees to abide by the requirements of the following as applicable: Title VI and Title VII of the Civil Rights Act of 1964, as amended, by the Equal Employment Opportunity Act of 1972, Federal Executive Order 11246, as amended, the Federal Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination Act of 1975, the Fair Housing Act of 1968, as amended, and Contractor agrees to abide by the requirements of the Americans with Disabilities Act of 1990.

Contractor agrees not to discriminate in its employment practices and will render services under the Contract without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, Political affiliation, disability, or age in any matter relating to employment. Any act of discrimination committed by Contractor, or failure to comply with these statutory obligations when applicable shall be grounds for termination of the Contract.

1.47 Record Retention

The Contractor shall maintain all records in relation to the Contract for a period of at least five (5) years after final payment.

1.48 Record Ownership

All records, reports, documents, or other material related to any Contract resulting from this RFP and/or obtained or prepared by Contractor in connection with the performance of the services contracted for herein shall become the property of LITACorp and shall, upon request, be returned by Contractor to LITACorp, at Contractor's expense, at termination or expiration of the Contract.

1.49 Content of Contract/Order of Precedence

In the event of an inconsistency between the Contract, the RFP and/or the Contractor's Proposal, the inconsistency shall be resolved by giving precedence first to the final Contract, then to the RFP and subsequent addenda (if any) and finally, the Contractor's Proposal.

1.50 Contract Changes

No additional changes, enhancements, or modifications to any Contract resulting from this RFP shall be made without the prior written approval of LITACorp. Changes to the Contract include any change in; compensation; beginning/ending date of the contract; scope of work; and/or Contractor change through the Assignment of Contract process. Any such changes, once approved, will result in the issuance of an amendment to the Contract.

1.51 Substitution of Personnel

LITACorp intends to include in any Contract resulting from this RFP the following condition:

Substitution of Personnel: If, during the term of the Contract, the Contractor or subcontractor cannot provide the personnel as proposed and requests a Substitution, that Substitution shall meet or exceed the requirements stated herein. A detailed resume of qualifications and justification is to be submitted to LITACorp for approval prior to any personnel Substitution. It shall be acknowledged by the Contractor that every reasonable attempt shall be made to assign the personnel listed in the Contractor's proposal.

LITACorp shall reserve the right to require removal and replacement of any Contract personnel whose performance it considers unacceptable. The Contractor's personnel assigned to a Task Order shall not be replaced without the prior written consent of LITACorp. Such consent shall not be unreasonably withheld or delayed provided an equally qualified replacement is offered. In the event that any LITACorp or Contractor personnel become unavailable due to resignation, illness, or other factors, excluding

assignment to project outside the Contract, outside of LITACorp's or Contractor's reasonable control, as the case may be, LITACorp or the Contractor shall be responsible for providing an equally qualified replacement in time to avoid delays in completing tasks.

1.52 Governing Law

All activities associated with this RFP process shall be interpreted under Louisiana Law, including but not limited to La. R.S. 39:1551-1736 (Louisiana Procurement Code), if applicable; purchasing rules and regulations; executive orders; standard terms and Conditions; special terms and Conditions; and specifications listed in this RFP. Venue of any action brought with regard to the contract shall be in the Nineteenth Judicial District Court, Parish of East Baton Rouge, State of Louisiana.

1.53 Claims or Controversies

Any claims or controversies shall be resolved in accordance with the Louisiana Procurement Code, La. R.S. 39:1671-1673.

1.54 Proposer's Certification of No Federal Suspension or Debarment

By signing and submitting any proposal, the Proposer certifies that their company, any subcontractors, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in "audit Requirements in Subpart F of the Office of Management and Budget's (OMB) Uniform Administrative Requirements, Cost Principles, and agency Requirements for Federal Awards" (formerly OMB Circular A-133).

A list of parties who have been suspended or debarred can be viewed via the internet at <https://www.sam.gov>.

1.54.1 Proposer's Eligibility

A statement of the Proposer's involvement in investigation and any suspension or debarment proceedings which could affect this work shall also be included in the Proposal. A suspension or debarment proceeding which could affect this work is any proceeding, whether pending or concluded, that involves a governmental body or governmental agency. If no such investigation, suspension or debarment exists, the proposer shall so state.

1.54.2 Continuing Obligation

The Contractor has a continuing obligation to disclose any suspensions or debarment by any government agency, including General Services Administration (GSA). Failure to

disclose may constitute grounds for suspension and/or termination of the Contract and debarment from future contracts.

1.55 Anti-Kickback Clause

The Contractor hereby agrees to adhere to the mandate dictated by the Copeland "Anti-Kickback" Act which provides that each Contractor or subgrantee shall be prohibited from inducing, by any means, any person employed in the completion of work, to give up any part of the compensation to which he is otherwise entitled.

1.56 Clean Air Act

The Contractor hereby agrees to adhere to the provisions which require compliance with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act which prohibits the use under non-exempt federal contracts, grants or loans of Facilities included on the Environmental Protection Agency (EPA) list of Violating Facilities.

1.57 Energy Policy and Conservation Act

The Contractor hereby recognizes the mandatory standards and policies relating to energy efficiency contained in the Energy Policy and Conservation Act (P.L. 94-163).

1.58 Clean Water Act

The Contractor hereby agrees to adhere to the provisions which require compliance with all applicable standards, orders, or requirements issued under Section 508 of the Clean Water Act which prohibits the use under non-exempt federal contracts, grants or loans of Facilities included on the Environmental Protection Agency (EPA) List of Violating Facilities.

1.59 Anti-Lobbying and Debarment Act

The Contractor will be expected to comply with federal statutes required in the Anti-Lobbying Act and the Debarment Act.

1.60 Warranties

Contractor warrants that all services shall be performed in good faith, with diligence and care, by experienced and qualified personnel in a professional, workmanlike manner, and according to its current description (including any completion criteria) contained in the scope of work. Contractor further warrants that it has the right to provide and/or license its product to LITACorp and that it will operate in accordance with this solicitation. In the

event of a material failure of Contractor's product to function and operate, and/or failure by the Contractor to perform its obligations, in accordance with the terms and Conditions of the contract that results in the termination of the contract for cause by LITACorp, LITACorp will not be obligated to compensate the Contractor of any costs incurred by Contractor.

1.61 Code of Ethics

The Contractor acknowledges that Chapter 15 of Title 42 of the Louisiana Revised Statutes (La. R.S. 42:1101 et. seq., Code of Governmental Ethics) applies to the Contracting Party in the performance of services called for in the Contract. The Contractor agrees to immediately notify LITACorp if potential violations of the Code of Governmental Ethics arise during the Contract term.

1.62 LITACorp's Statements

Statements, acts and omissions made by or on behalf of the LITACorp regarding this RFP, any Proposer and/or any subcontractor of a Proposer shall not be deemed a conflict of interest when the Executive Director is discharging the Executive Director's duties and responsibilities under law, including, but not limited, to LITACorp's authority in procurement matters.

1.63 Proposer's Cooperation

Any Proposer has the duty to fully cooperate with LITACorp and provide any and all requested information, documentation, etc. to LITACorp when requested. This applies even if an eventual Contract is terminated and/or a lawsuit is filed. Specifically, the Proposer shall not limit or impede LITACorp's right to audit or to withhold LITACorp-owned documents.

1.64 Security

Contractor's personnel shall comply with all security regulations in effect at LITACorp's premises, the Information Security Policy at <http://www.doa.la.gov/Pages/LITACorp/Informationsecurity.aspx> and externally for materials and property belonging to LITACorp or to the project. Where special security precautions are warranted (e.g., correctional facilities), LITACorp shall provide such procedures to the Contractor, accordingly. Contractor is responsible for promptly reporting to LITACorp any known breach of security.

1.65 Prohibition of Discriminatory Boycotts of Israel

In accordance with Executive Order Number JBE 2018-15, the following applies to any

Proposal with a value of \$100,000 or more and to Proposers with five or more employees:

By submitting a response to this solicitation, the Proposer certifies and agrees that the following information is correct: In preparing its response, the Proposer has considered all proposals submitted from qualified, potential subcontractors and suppliers, and has not, in the solicitation, selection, or commercial treatment of any subcontractor or supplier, refused to transact or terminated business activities, or taken other actions intended to limit commercial relations, with a person or agency that is engaging in commercial transactions in Israel or Israeli-controlled territories, with the specific intent to accomplish a boycott or divestment of Israel. The Proposer has also not retaliated against any person or other agency for reporting such refusal, termination, or commercially limiting actions. LITACorp reserves the right to reject the response of the Proposer if this certification is subsequently determined to be false, and to terminate any contract awarded based on such a false response.

1.66 Key Internal Control Outsourcing

NOT REQUIRED FOR THIS RFP

1.67 Cooperative Purchase

NOT REQUIRED FOR THIS RFP

PART II: SCOPE OF WORK/SERVICES

2.1 Scope of Work/Services

LITACorp is soliciting proposals from firms that are able to provide temporary Consulting support services in one (1) or more of the following Staffing Support Areas:

- a. Pursuing IIJA Grant Funding
- b. Managing Successful IIJA Grant Applications
- c. Project Management
- d. Professional Technical Support

LITACorp reserves the right to request additional related services as deemed necessary.

Additional information, including job titles and descriptions associated with each Staffing Support Area, may be found in **Attachment II: Staffing Support Areas**.

This RFP will be used to award Staffing Support Contracts for each Staffing Support Area.

LITACorp reserves the right to issue Task Orders for specific temporary staffing support

services identified by LITACorp.

Contracts resulting from this procurement shall not be construed to require LITACorp to use these Contracts exclusively for temporary Consulting Staffing Support. LITACorp reserves the right to procure such services using traditional procurement methods when it's in the best interest of LITACorp to do so.

2.1.1 Additional Staffing Support

LITACorp reserves the right to issue a Staffing Support Task Order for specific Consulting staff support services in any of the Staffing Support Areas identified in **Attachment II: Staffing Support Areas**.

2.1.1.1

LITACorp will utilize any of the following procedures prior to issuing a Task Order:

1. Prepare a Staffing Support Request for Response (RFR). An RFR is an informal process used to seek additional information to assist LITACorp in making a best value determination. The RFR may include, but is not limited to, the following:

a. A performance-based statement of work that includes such things as:

- i. the work to be performed;
- ii. location of the work;
- iii. period of performance;
- iv. deliverable schedule;
- v. applicable performance standards;
- vi. acceptance criteria;
- vii. any special requirements (e.g. security clearances, special knowledge, etc.).

b. a request for submittal of a project plan for performing the task and information on the Contractor's experience and/or past performance performing similar tasks;

c. a request for submittal of firm-fixed hourly rates for the service which are no higher than the hourly rates offered in the Staffing Support Contract.

2. LITACorp may issue a Task Order by allowing Contractors to give oral presentations in lieu of written response to an RFR. The RFR or invitation to present will be sent to all Tier One Contractors holding a contract in the pertinent Staffing Support Area. A minimum of one (1) week will be provided for submittal of a response to the RFR. A minimum of two (2) weeks will be provided to prepare an oral presentation. Each Contractor should respond to the RFR with either an RFR Response or a written notification that no RFR

Response will be submitted.

2.1.1.2 Evaluation and Selection

LITACorp will make a best value determination to place the Task Order with the Contractor that meets LITACorp's needs. The best value determination will consider pricing and such factors as the Contractor's:

technical qualifications;
administrative costs;
qualifications and experience of proposed staff;
compatibility with LITACorp's environment;
effective utilization of Contractor and all available resources;
understanding of LITACorp's needs.

2.1.1.3 Task Order

LITACorp will issue a Staffing Support Task Order using the model Staffing Support Task Order identified as Exhibit A which will incorporate LITACorp and project specific information as necessary. The Staffing Support Task Order will also incorporate a Statement of Work (SOW) specifying the details of the work to be performed and authorized under the Task Order. If agreement is not reached on the terms of the Task Order within ten (10) business days or if the selected Contractor fails to deliver the specified resources within ten (10) business days or an alternative schedule approved by LITACorp, LITACorp may elect to cancel the Task Order and issue the Task Order to the Contractor offering the next best value to LITACorp.

2.1.2 Infrastructure Types

The projects addressed under the awarded Contract(s) are limited to infrastructure types included in the Infrastructure Investment and Jobs Act (IIJA) (<https://www.govinfo.gov/app/details/PLAW-117publ58>).

2.2 Deliverables

Each Staffing Support Task Order issued shall specify the deliverables required from the Contractor for that Staffing Support Task Order.

2.3 Hourly Rate Table

Rates proposed by the Proposers shall be submitted on the Hourly Rate Table by Staffing Support Area furnished herein on Attachment III: Hourly Rate Table, of this RFP. Rates submitted shall be firm for the term of the Contract. In providing hourly rates, Proposers

should consider the varying skills and experience of staff which they may offer. Any anticipated travel or other expenses required to meet the requirements must be included in the proposed hourly rate.

2.4 Client/Location

The Task Order governing a specific assignment will specify the Political subdivision receiving assistance. The location(s) where the work and/or service is to be performed, completed and managed shall be defined in each Staffing Support Task Order.

2.5 Proposal Elements

2.5.1 Financial

Proposal shall include rates per the Hourly Rate Table furnished in **Attachment II: Hourly Rate Table**, of this RFP.

2.5.2 Technical

2.5.2.1 Mandatory Requirements

The mandatory requirements are as follows:

Proposer must describe at least three (3) engagements in which the Proposer provided Staffing Support in each of the particular Staffing Support Area(s) for which the proposal is being submitted, within the past three (3) years. One (1) of the clients in the engagements listed above must have been in State or local government with an annual Consulting budget of at least \$10,000.00. All three (3) engagements should be production systems or environments, not initiatives that are still in development.

The Proposer must provide customer references for each of the engagements described in the preceding paragraph. The Proposer is to ensure that LITACorp is able to have appropriate access to the clients listed as references, by providing information such as contact name, address, telephone number, email address, etc.

All proposed subcontractors shall also provide three (3) business references that reflect their ability to deliver the services for which they are proposed. All references shall be provided in accordance with the requirements set forth in Attachment IV Format for submitting Proposer's References of this RFP. The Proposer shall provide a statement of whether there are any pending Securities Exchange Commission investigations involving the Proposer, and if such are pending or in progress, an explanation providing relevant details and an attached opinion of counsel as to whether the pending investigation(s) will impair the Proposer's performance in a Contract under this RFP. Any proposal that fails

to satisfy these requirements shall be considered non-responsive, and shall not receive further consideration.

2.5.2.2 Desirable Qualifications

Each Proposer should address how the firm will meet all the requirements of this RFP, with particular attention to:

- * Describe Proposer's business operations such as the year founded; brief history of the company discussing current size in terms of staff, revenue, and profit; and principal owners/officers of the company (see **Section 1.8.1 TAB 2**).
- * Provide customer references for at least three (3) engagements in which Proposer provided Consulting staffing services in each of the particular Staffing Support Area(s) (see Attachment II – Staffing Support Areas) for which the proposal is being submitted, within the past three (3) years. One (1) of the clients in the engagements listed above must have been in State or local government with an annual Consulting budget of at least \$10,000. All three (3) engagements should be production systems or environments, not initiatives that are still in development.
- * Proposer's experience in providing Consulting staffing services. The information provided should include the following details for at least three (3) engagements: the Consulting operations environment and technologies employed, number of staff provided, type of business or government agency, size of client in terms of annual revenue or budget, and duration of the engagement.
- * Provide information demonstrating Proposer's financial stability such as total annual revenue, profit and cash flow, including audited financial statements for the past three (3) years, most recent Dun & Bradstreet (D&B) Business Information Report™ for the firm. (Submission of the D&B Number without the full report is insufficient). If the Proposer is not registered with D&B, Proposer may submit three (3) current written, positive credit references, in the form of signed and dated standard business letters from clients with which the Proposer has done business.
- * Provide the names of all proposed Subcontractors, their contact information, and three (3) business references for each proposed Subcontractor that reflect their ability to deliver the services for which they are proposed.
- * Provide for each proposed Subcontractor a brief history of their company, and information that would demonstrate financial strength and industry focus.
- * Describe each proposed Subcontractor's experience in providing Consulting staffing services, including Consulting operations environments supported,

number of staff available for assignment, and types of business or government entities served.

- * Information demonstrating the Proposer's understanding of the nature and scope of this project.
- * Provide Proposer's capacity for providing the types and numbers of resources in the staffing support areas being proposed that may be required at any time over the life of the resulting engagements (see **Section 1.8.1 H** of this RFP).
- * Any other information deemed pertinent by the Proposer including terms and Conditions which the Proposer wishes LITAC to consider.

PART III: EVALUATION AND SELECTION OF STAFFING SUPPORT CONTRACTORS

LITACorp shall conduct a comprehensive, fair, and impartial evaluation of all proposals received. LITACorp may reject any proposal that is incomplete or in which there are significant inconsistencies or inaccuracies.

LITACorp has established an Evaluation committee for each Staffing Support Area to review, evaluate, and verify information submitted by the Proposers. Each committee will evaluate only those proposals received for its Staffing Support Area. This section describes the evaluation methodology and criteria to be used to evaluate each proposal submitted. Consulting is LITACorp's intent to award multiple Contracts in each Staffing Support Areas.

Each evaluation committee shall assign points to its evaluation of each Proposal as follows:

Evaluation criteria Possible Points

Financial Proposal (Section 3.1) 30
Technical Proposal (Section 3.2) 70
Total Possible Points 100

The Proposal will be evaluated in light of the material and the substantiating evidence presented to LITACorp, not on the basis of what may be inferred. For a Proposer to proceed to the Financial Proposal evaluation, the Proposer shall achieve a minimum score equivalent to fifty percent (50%) of the possible points assigned to the Technical Proposal. Any Proposal failing to receive the minimum score at the completion of the detailed evaluation of the Technical Proposals will not be evaluated further and will be ineligible for award.

The scores for the Financial Proposals and Technical Proposals will be combined to determine the overall score. Proposers must score a minimum of fifty (50) (out of one-hundred (100)) TOTAL points (Technical and Financial combined) to be considered for selection in a Staffing Support Area.

3.1 Financial Proposal

The Financial Proposal should be packaged and sealed separately from the Technical Proposal and should be clearly marked as “FINANCIAL PROPOSAL”.

Financial Proposals will be opened only after all Technical Proposals have been evaluated. Financial Proposals for each Staffing Support Area will be evaluated independently of the other Staffing Support Areas. A maximum score of 30 points will be assigned in each Staffing Support Area based on the hourly labor rates submitted by the Proposer on the schedule provided in **Attachment III: Hourly Rate Table**. The Financial score will be calculated as follows:

- * The Proposer shall provide three (3) hourly rates for each of the job Titles in the Staffing Support Areas being proposed listed in Attachment III: Hourly Rate Table of this RFP. LITACorp has allocated a specific number of hours for each job Title for the purposes of computing a total cost for the Rate Sheet Model that can be factored in. These hours will be revealed in the sealed cost model. No additional rows may be added to this table and no Substitutions for a job Title or for the number of associated hours is allowed.
- * A proposer’s base Financial Score will be based on the financial information provided in **Attachment III: Hourly Rate Table of this RFP**. Consulting will be computed as follows:

$$BCS = (LPC/PC \times 30)$$

Where: BCS = Computed cost score (points) for Proposer being evaluated

LPC = Lowest proposed cost of all Proposers

PC = Total cost of Proposer being evaluated

FPP = Financial Proposal Points

3.2 Technical Proposal

A maximum of 70 points have been assigned for qualifications of the Proposer. items to be evaluated in each Staffing Support Area include but are not limited to: the depth and relevance of Proposer's experience in providing technical staff augmentation services; public sector experience; demonstrated commitment to employee training and certification in grant processes as well as technical specialties. Proposer responsibility will be determined by the firm's financial strength, stability, and integrity. The following criteria are of importance and relevance to the evaluation of this RFP and will be used by

the Evaluation committee in the evaluation of the Technical Proposal. Such factors include:

- * Company Background and Experience providing technical staff augmentation (40 Points)
- * Approach and Methodology used to identify, recruiting, train, and retain staffing resources (30 Points)

PART IV: PERFORMANCE STANDARDS

4.1 Performance Requirements

Performance requirements for the Staffing Support Contracts include:

- * Timely submittal of a RFR Response or written notification that no RFR Response will be submitted
- * Timely response to LITACorp's invitation to give an oral presentation. Specific performance requirements for each Staffing Support Task Order will be provided in the RFR or the invitation to give an oral presentation. Such performance requirements include the results to be achieved from the project, the deadlines for timely completion, and any special requirements for performance.

4.2 Performance Measurement

LITACorp will measure and evaluate the Contractor's Temporary Staffing Support Contract performance as follows:

- * Percentage of RFR Responses submitted
- * Response time
- * Timely resolution of problems
- * Accurate processing of invoices

For each Staffing Support Task Order, Contractor will provide day-to-day project management using best management practices for all tasks and activities. The Contractor will document and deliver to LITACorp the results and approval by LITACorp personnel of each completed assignment. LITACorp will measure the Contractor's performance by the quality of the completed assignment. Status reports will be delivered to LITACorp as requested. Status reports will address assignment progress in terms of hours spent, current status of work in progress, plans for next reporting period and any significant issues. Status reports will be delivered to LITACorp upon request.

Attachment II: Staffing Support Areas

The Staffing Support procurement method offers LITACorp a flexible means of contracting for temporary Consulting personnel (Staff). The job titles that can be contracted through this procurement method are classified into four (4) functional areas or Staffing Support Areas:

Area 1. Pursuing IIJA Grant Funding

The Consultant Team will provide the services necessary for Clients to pursue IIJA grant funding opportunities for viable projects under the IIJA ACT's specific requirements. The services will vary as competitive proposals may range from simple to complex depending upon the project or the program. Example services include:

- * Understand all grant eligibility information, application submittal requirements, grant portal system requirements, and all nuances to each grant application process;
- * Collect grant application instructions and information and tracking FAQs and guideline changes;
- * Prepare and manage grant application submittal schedule, milestones, and agency staff review/approval timeline to successfully submit grant applications by their stated due date
- * Request information and conduct research, including workshops and meetings related to the development and submission of grant applications
- * Organize facts, data, statistics, and narrative collected and written as a part of assigned projects, developing tabular or graphic data displays as appropriate;
- * Synthesize gathered information and transform it into compelling narratives, exhibits, attachments, and other supplemental materials appropriate to the specific grant programs and that demonstrate eligibility, need and competitiveness of the grant requests within the programs' guidelines;
- * Develop technically sound conceptual project cost estimates, if not readily available, to outline base cost of subject projects;
- * Conduct public outreach, if applicable, including public and stakeholder meetings, to fulfill grant programs' engagement requirements and to build community awareness of and support for Client members' efforts and projects;
- * Draft and obtain letters of support and build community/elected official engagement in advocating for project funding in timely, appropriate ways;
- * Provide project budgets and justifications in alignment with applicant policies and personnel guidelines and in conformance with grant solicitation requirements;
- * Conduct detailed benefit cost analyses as required by various grant programs;
- * Gather required environmental data;
- * Edit draft proposals for consistency of messaging, ensuring integration of grant requirements and succinctness prior to applicant final review and submittal to

funder;

- * Ensure each grant package is prepared and submitted in a timely and complete fashion, with all elements adhering to grant requirements and evaluation criteria;
- * Conduct a QA/QC process to ensure accuracy and completeness;
- * Ensure Client members have access to grant submittal portals and, as needed, upload information into agency grant portals for members' convenience; and
- * Collect all materials prepared for any grant application and submit final versions to Client and applicant as part of a close-out process.
- * Assist with the coordination of regional and statewide projects to maximize impact and increase the competitiveness of submitted grant applications.

Area 2. Managing Successful IJA Grant Applications

As needed by Client members, the Consultant Team will provide services for complying with administrative requirements imposed upon winning grant applicants in return for their funding. These include actions such as assisting in:

- * Developing compliance policies and procedures required by grant programs;
- * Creating and/or maintaining project files that demonstrate compliance with all applicable federal, state, and local regulations;
- * Coordinating and managing the creation and submittal of all reports required of grant recipients by the awarding agency and/or state and federal law;
- * Streamlining reporting processes to ensure continued compliance and provide post-award grants administration and communicate these requirements to stakeholders to ensure cost recovery and compliance of expenditures using federal funds - while also minimizing administrative impacts to Client members;
- * Establishing internal financial tracking systems, if not yet established, to ensure funds are expended within established timelines;
- * Coordinating with stakeholders and applicants to obtain all cost and necessary backup documentation to develop grant submittals as well as required post-award compliance reporting;
- * Tracking and monitoring consultant's expended time and activities by project, or as allowable under the provisions of Federal guidance for direct administrative, indirect, and project management costs, referencing all Federal regulations and policy guidance;
- * Monitoring and evaluating the progress of projects post-award in accordance with the approved scope of work and budget outlined in grant applications; and
- * Assisting as may reasonably be associated with grant management activities any project closeout documentation that demonstrates that the scope of grant-funded work was fully implemented, all obligated funds were expended appropriately, and grant conditions were implemented and documented as required.

Area 3. Project Management

Project management will include such actions as:

- * Overall management and coordination of a project, including management or coordination with Area 1, Area 2 and Area 4 Staff.
- * Provide detailed and periodic staff and management reports to Client and to LITACorp on the status of the scope of work including project identification & prioritization, project scope development, grant submissions/approvals, open issues, financial overview, and other activities;
- * Prepare formal responses and communications to Client and LITACorp, applicant, and constituent questions and inquiries;
- * Attend associated legislative and community meetings and hearings as needed;
- * Assist Client staff to advocate for changes in the allocation and distribution of funds at the regional and local levels to ensure Client member transportation priorities, projects, and planning needs are sufficiently funded;
- * Assist Client staff and LITACorp in strategizing, identifying, and prioritizing funding needs, including matching funds.
- * Meet regularly with Client staff and LITACorp to discuss potential grant application and management issues including identifying programs to pursue, appropriately scope projects and determine the best strategy to proceed.

AREA 4. Professional Technical Support

Will have the ability to provide, accommodate or secure professional design and technical support as follows:

- * Provide design professionals including Louisiana licensed Engineers, Architects or Interior Designers available on staff or as subcontractors to assist with creating and submitting those designs and specifications necessary to illustrate feasibility and costs required to successfully obtain grants; and
- * Assist in-house or third-party Design Professionals hired to finalize and certify plans and specifications, oversee procurement processes, or oversee construction.

Attachment III: Hourly Rate Table

To be eligible for an award in a Staffing Support Area, Proposers must include hourly rates for all Staffing Support Areas. Please note that a Proposer's Area 4 Charged Rate must be the same as the Paid Rate.

Attachment IV: Format for Submitting Proposer's References

Proposer should provide at least three (3) customer references. The references should be for providing Staffing Support services as described in **Section 2.5.2.1 Mandatory Requirements** of this RFP. Proposer should ensure that the State evaluation team is able to have appropriate access to the clients listed as references. All requested information regarding Proposer's References should be complete. If any requested information is not applicable for the reference, indicate such with "N/A".

Three (3) customer references should also be supplied for each proposed subcontractor. Each customer reference should include the following information:

1. Client Name
2. Customer type (city government, state government, university, corporation, etc.)
3. Brief description of the client, including history, corporate structure and organization, and number of years in business.
4. Description of Staffing Support services provided to the client. This should be a high-level description of the client's infrastructure assessment and the Proposer's responsibilities to address them.
5. Was the Proposer the prime contractor or the subcontractor?
6. Describe the technical environments supported (database, server environment, etc.).
7. Service dates: specify start and end dates for the engagement. If engagement is ongoing, indicate the expected completion date, or state that there is no predetermined end date.
8. Relevance: Describe how this experience is relevant to the one described in this RFP. List the applicable Staffing Support areas as provided in **Attachment II - Staffing Support Areas** of this RFP.
9. Reference: Provide the name, title, address, email, and telephone number of the person who can be contacted for reference verification.

Attachment V: Certification Statement (Form)

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of this Request for Proposals (RFP), including attachments.

OFFICIAL CONTACT LITACorp requests that the Proposer designate one (1) person to receive all documents and the method in which the documents are best delivered. The Proposer should identify the Contact name and fill in the information below: (Print Clearly)

Date: _____

Official Contact Name: _____

A. E-mail Address: _____

B. Facsimile Number with area code: (_____) _____

C. US Mail Address: _____

The Proposer shall certify that the above information is true and shall grant permission to the LITACorp to contact the above-named person or otherwise verify the information provided. By its submission of this proposal and authorized signature below, Proposer shall certify that:

1. The information contained in its response to this RFP is accurate;
2. Proposer shall comply with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein;
3. Proposer shall accept the procedures, evaluation criteria, mandatory contract terms and conditions, and all other administrative requirements set forth in this RFP;
4. Proposer's Financial Proposal shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal response;
5. Proposer understands that if contract negotiation period exceeds thirty (30) days or if the selected Proposer fails to sign the contract within seven (7) calendar days of delivery of it, the State may elect to cancel the award and award the contract to the next most advantageous responsible Proposer; and
6. Proposer shall certify, by signing and submitting a proposal, the Proposer certifies that their company, any subcontractors, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in "Audit Requirements in Subpart F of the Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards" (formerly OMB Circular A-133). (A list of parties who have been suspended or debarred can be viewed via the internet at <https://www.sam.gov>).

Authorized Signature: _____

Typed or Printed Name: _____

Title: _____

Company Name: _____

Address: _____

City: State: Zip: _____

SIGNATURE of Proposer's Authorized Representative

DATE _____

Attachment VI: Sample Generic Contract

STATE OF LOUISIANA File No. _____

PARISH OF _____ Solicitation No. _____

(NAME OF CONTRACT)

1. CONTRACT

Be it known, that effective upon approval by the Director of LITACorp, as evidenced by the Director's signature on this document, Louisiana Infrastructure Technical Assistance Corporation (hereinafter sometimes referred to as "LITACorp") and (Contractor's name and legal address including zip code) (hereinafter sometimes referred to as "Contractor") do hereby enter into this Contract under the following terms and conditions.

2. SCOPE OF SERVICE

Contractor hereby agrees to furnish the following services:

(If the Scope of Services is lengthier than will fit here, it may be attached separately, referenced and incorporated herein.)

2.1. PERFORMANCE REQUIREMENTS

2.2. PERFORMANCE MEASUREMENT/EVALUATION

3. CONTRACT MODIFICATIONS

No amendment or modification of the terms of this Contract shall be valid unless made in writing, signed by the parties and approved as required by law. No oral understanding or agreement not incorporated in this Contract is binding on any of the parties.

Changes to this Contract include any change in a) compensation; b) beginning/ending date of this Contract; c) scope of work; and/or d) Contractor change through the assignment of Contract process. Any such changes, once approved, will result in the issuance of an amendment to this Contract.

4. FUND USE

Contractor agrees not to use Contract proceeds to urge any elector to vote for or against any candidate or proposition on an election ballot nor shall such funds be used to lobby for or against any proposition or matter having the effect of law being considered by the Louisiana Legislature or any local governing authority. This provision shall not prevent

the normal dissemination of factual information relative to a proposition on any election ballot or a proposition or matter having the effect of law being considered by the Louisiana Legislature or any local governing authority.

5. HEADINGS

Descriptive headings in this Contract are for convenience only and shall not affect the construction of this Contract or meaning of contractual language.

6. PAYMENT TERMS

The LITACorp shall pay Contractor in accordance with the Pricing Schedule set forth in Attachment “__” to this Contract. The Contractor may invoice LITACorp monthly at the billing address designated by LITACorp. Payments will be made by LITACorp within approximately thirty (30) days after receipt of a properly executed invoice, and approval by the LITACorp. Invoices shall include the Contract and order number, using department and product purchased. Invoices submitted without the referenced documentation will not be approved for payment until the required information is provided.

7. LATE PAYMENTS

Interest due by the LITACorp for late payments shall be in accordance with La. R.S. 39:1695 at the rates established in La. R.S. 13:4202.

8. DELIVERABLES

Contractor will deliver the item(s) or service(s) as described below (or per the attached) per the following schedule.

9. TAXES

Contractor agrees that all applicable taxes are included in the Pricing Schedule set forth in Attachment “__” to this Contract. LITACorp is exempt from all State and local sales and use taxes.

10. TERMINATION

The LITACorp has the right to terminate this Contract immediately for any of the following reasons: (a) misrepresentation by the Contractor; (b) Contractor’s fraud, collusion, conspiracy or other unlawful means of obtaining any Contract with the LITACorp; (c) conflict of Contract provisions with constitutional or statutory provisions of State or Federal Law; (d) abusive or belligerent conduct by the Contractor towards an employee or LITACorp employee; (e) Contractor’s intentional violation of the Louisiana Procurement

Code (La. R.S. 39:1551 et seq.) and its corresponding regulations; or, (f) any listed reason for debarment under La. R.S. 39:1672.

10.1. TERMINATION OF THIS CONTRACT FOR CAUSE

LITACorp may terminate this Contract for cause based upon the failure of Contractor to comply with the terms and/or conditions of this Contract, or failure to fulfill its performance obligations pursuant to this Contract, provided that the LITACorp shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) days after receipt of such notice, the Contractor shall not have corrected such failure or, in the case of failure which cannot be corrected in thirty (30) days, begun in good faith to correct such failure and thereafter proceeded diligently to complete such correction, then may, at its option, place the Contractor in default and this Contract shall terminate on the date specified in such notice.

The Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of LITACorp to comply with the terms and conditions of this Contract, provided that the Contractor shall give LITACorp written notice specifying LITACorp's failure and a reasonable opportunity for the LITACorp to cure the defect.

10.2. TERMINATION OF THIS CONTRACT FOR CONVENIENCE

LITACorp may terminate this Contract for convenience at any time (1) by giving thirty (30) days written notice to the Contractor of such termination; or (2) by negotiating with the Contractor an effective date. LITACorp shall pay the Contractor for, if applicable: (a) deliverables in progress; (b) the percentage that has been completed satisfactorily; and, (c) for transaction-based services up to the date of termination, to the extent work has been performed satisfactorily.

10.3. TERMINATION FOR NON-APPROPRIATION OF FUNDS

The continuation of this Contract is contingent upon the appropriation of funds to fulfill the requirements of this Contract by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of this Contract or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act or Title 39 of the Louisiana Revised Statutes of 1950 to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of this Contract, this Contract shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

11. OWNERSHIP

All records, reports, documents, or other material related to this contract and/or obtained or prepared by the Contractor in connection with the performance of the services contracted for herein shall become the property of LITACorp, and shall, upon request, be returned by the Contractor to LITACorp, at the Contractor's expense, at termination or expiration of this contract. All records, reports, documents and other material delivered or transmitted to the Contractor by LITACorp shall remain the property of LITACorp, and shall be returned by the Contractor to LITACorp at the Contractor's expense, at termination or expiration of this contract.

12. USE OF AGENCY'S FACILITIES

Any property of LITACorp furnished to the Contractor shall, unless otherwise provided herein, or approved by LITACorp, be used only for the performance of this contract. The Contractor shall be responsible for any loss or damage to property of LITACorp which results from willful misconduct or lack of good faith on the part of the Contractor or which results from the failure on the part of the Contractor to maintain and administer that property in accordance with sound management practices, to ensure that the property will be returned to LITACorp in like condition, except for normal wear and tear, to that in which it was furnished to the Contractor. Upon the happening of loss, or destruction of, or damage to property of LITACorp, the Contractor shall notify LITACorp thereof and shall take all reasonable steps to protect that property from further damage. The Contractor shall surrender to LITACorp all property of LITACorp prior to settlement upon completion, termination, or cancellation of this contract. All reference to the Contractor under this section shall include any of its employees, agents, or subcontractors.

13. WAIVER

Waiver of any breach of any term or condition of this contract shall not be deemed a waiver of any prior or subsequent breach. No term or condition of this contract shall be held to be waived, modified or deleted except by the written consent of both parties.

14. WARRANTIES

Contractor warrants that all services shall be performed in a workmanlike manner, and according to its current description (including any completion criteria) contained in the scope of work. Contractor further warrants that it has the right to provide and or license its product to LITACorp and that it will operate in accordance with this contract. In the event of a material failure of Contractor's product to function and operate, and/or failure by the Contractor to perform its obligations, in accordance with the terms and conditions of this Contract that results in the termination of this contract for cause by LITACorp, LITACorp will not be obligated to compensate the Contractor of any costs incurred by Contractor.

Extent of Warranty: THESE WARRANTIES REPLACE ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE

15. INDEMNIFICATION AND LIMITATION OF LIABILITY

Neither party shall be liable for any delay or failure in performance beyond its control resulting from acts of God or force of nature. The parties shall use reasonable efforts to eliminate or minimize the effect of such events upon performance of their respective duties under this contract. Contractor shall be fully liable for the actions of its agents, employees, partners or subcontractors and shall fully indemnify and hold harmless LITACorp from suits, actions, damages and costs of every name and description relating to personal injury and damage to real or personal tangible property caused by Contractor, its agents, employees, partners or subcontractors in the performance of this contract, without limitation; provided, however, that the Contractor shall not indemnify for that portion of any claim, loss or damage arising hereunder due to the negligent act or failure to act of LITACorp.

Contractor will indemnify, defend and hold LITACorp harmless, without limitation, from and against any and all damages, expenses (including reasonable attorneys' fees), claims judgments, liabilities and costs which may be finally assessed against LITACorp in any action for infringement of a United States Letter Patent with respect to the Products, Materials, or Services furnished, or of any copyright, trademark, trade secret or intellectual property right, provided that LITACorp shall give the Contractor: (i) prompt written notice of any action, claim or threat of infringement suit, or other suit, (ii) the opportunity to take over, settle or defend such action, claim or suit at Contractor's sole expense, and (iii) assistance in the defense of any such action at the expense of Contractor.

Where a dispute or claim arises relative to a real or anticipated infringement, LITACorp may require Contractor, at its sole expense, to submit such information and documentation, including formal patent attorney opinions, as the Commissioner of Administration shall require. The Contractor shall not be obligated to indemnify that portion of a claim or dispute based upon:

- (i) LITACorp's unauthorized modification or alteration of a Product, Material, or Service;
- (ii) LITACorp's use of the Product, Material, or Service in combination with other products, materials, or services not furnished by Contractor; (iii) LITACorp's use in other than the specified operating conditions and environment.

In addition to the foregoing, if the use of any item(s) or part(s) thereof shall be enjoined for any reason or if Contractor believes that it may be enjoined, Contractor shall have the right, at its own expense and sole discretion as LITACorp's exclusive remedy to take

action no later than six (6) months after the issuance of an injunction in the following order of precedence:

(i) to procure for LITACorp the right to continue using such item(s) or part(s) thereof, as applicable; (ii) to modify the component so that it becomes non-infringing equipment of at least equal quality and performance; or (iii) to replace said item(s) or part(s) thereof, as applicable, with non-infringing components of at least equal quality and performance, or (iv) if none of the foregoing is commercially reasonable, then provide monetary compensation to LITACorp up to the dollar amount of this Contract.

Any injunction that is issued against LITACorp which prevents LITACorp from utilizing the Contractor's product in excess of six (6) months and for which the Contractor has not obtained for LITACorp or provided to LITACorp one of the alternatives set forth in the foregoing sentence is cause for LITACorp to terminate this contract. In the event of such termination, LITACorp will not be obligated to compensate the Contractor for any costs incurred by the Contractor.

For all other claims against the Contractor where liability is not otherwise set forth in this contract as being "without limitation", and regardless of the basis on which the claim is made, Contractor's liability for direct damages, shall be the greater of \$100,000, the dollar amount of this contract, or two (2) times the charges for services rendered by the Contractor under this contract. Unless otherwise specifically enumerated herein mutually agreed between the parties, neither party shall be liable to the other for special, indirect or consequential damages, including lost data or records (unless the Contractor is required to back-up the data or records as part of the work plan), even if the party has been advised of the possibility of such damages. Neither party shall be liable for lost profits, lost revenue or lost institutional operating savings.

LITACorp may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor, or may proceed against the performance and payment bond, if any, as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against them.

16. INSURANCE

Contractor will be required to provide LITACorp with Certificates of adequate insurance indicating coverage required, (in accordance with Section(s) 1.38 of the RFP). The Contractor shall maintain the insurance for the full term of this Contract. Failure to comply shall be grounds for termination of this Contract.

17. LICENSES AND PERMITS

Contractor shall secure and maintain all licenses and permits and pay inspection fees required to do the work required to complete this contract, if applicable.

18. SEVERABILITY

If any term or condition of this contract or the application thereof is held invalid, such invalidity shall not affect other terms, conditions or applications which can be given effect without the invalid term, condition, or application; to this end the terms and conditions of this contract are declared severable.

END OF DOCUMENT



REQUEST FOR PROPOSALS:
TECHNICAL ASSISTANCE PROGRAM
ATTACHMENT III – RATE TABLE

Attachment III: Hourly Rate Table

PROPOSER NAME: _____

STAFFING AREAS – AREA/POSITIONS	NUMBER OF STAFF AVAILABLE	HOURLY RATE CHARGED	HOURLY RATE PAID
(AREA)	(INFORMATIONAL)	(TO STATE)	(TO STAFF)
Area 1 Pursuing IIJA Grant Funding – GRANT WRITER			
Area 2 Managing Successful IIJA ACT Grant Applications – GRANT MANAGER			
Area 3 Project Management – PROJECT MANAGER (Non-Principal)			
Area 3 Project Management – MANAGER-PRINCIPAL (OWNER)			<i>Same as Charged</i>
Area 4 Enhanced Project Management – ENGINEER/ARCHITECT			<i>Same as Charged</i>
Area 4 Enhanced Project Management – OTHER LICENSED DESIGN PROFESSIONALS or CERTIFIED PROFESSIONALS			

A proposer has the overall responsibility for its staff administration, payroll and staff qualifications. A proposer’s principal may serve in any position as staff to be paid hourly for services personally provided. However, the rate charged vs. the rate paid must be the same for the positions indicated in the table. All final rates payable are negotiable by LITAC and must be approved by the Division of Administration.



**TECHNICAL ASSISTANCE PROGRAM:
TECHNICAL PROPOSAL + RATE SHEET
FRANKLIN ASSOCIATES, LLC**



**FRANKLIN
ASSOCIATES**

**Louisiana Infrastructure Technical
Assistance Corporation (LITACorp)**



Grant Application and Grant Administrative Support Services Technical Proposal Staffing Support Areas 1, 2 and 3

| RFP # LITACorp 01-2022 | Date Submitted: December 23, 2022

| Office Location - 250 S. Foster Dr., Baton Rouge, LA 70806 |

FRANKLINASSOCIATES.COM

PUTTING PEOPLE FIRST

December 23, 2022

Regarding RFP#: LITACorp 01-2022 GRANT APPLICATION AND GRANT ADMINISTRATIVE SUPPORT SERVICES

Leslie Anne Durham, Executive Director
LITACorp, 707 N Seventh St.
Baton Rouge, LA 70802
leslie@LITACorp.org

Dear Ms. Durham,

Franklin Associates, LLC (Franklin), a minority-owned business based in Baton Rouge and committed to enhancing communities across our state, is partnered with **GrantWorks, Inc. (GrantWorks)** for this opportunity. We offer LITACorp decades of experience writing successful grant applications for federal funding and grant and project management expertise to help eligible entities successfully obtain much-needed funding to carry out eligible projects. Having worked in all 64 parishes and managed administration of billions of dollars of federal grant funding, we are uniquely qualified to provide staff support services to ensure Louisiana communities have access to as much Infrastructure Investment and Job Acts (IIJA)/Bipartisan Infrastructure Law (BIL) funding as possible.

On behalf of Franklin, I submit this document as an agreement between Franklin and Louisiana Infrastructure Technical Assistance Corporation (LITACorp) to provide services including pursuing IIJA funding (AREA 1), managing successful IIJA grant applications (AREA 2), and project management (AREA 3). As the sole owner of Franklin Associates, LLC and a corporate officer listed on the most current annual report on file with the Secretary of State, I am authorized to contractually obligate Franklin, will function as the primary contact, and am the contact person for any technical and contractual clarifications throughout the evaluation period. To ensure private financial information is not made publicly available, we have also included a redacted copy of our Technical Proposal and Financial Proposal.

Franklin has thoroughly reviewed the solicitation, crafted our response based on proven professional experience, and will enter a contract with LITACorp to effect this. Further, we have reviewed, understand, and agree to all the conditions, requirements, and terms stated in the RFP.

Sincerely,



Perry J. Franklin, Owner & President
Franklin Associates, LLC EIN #13-4306744
250 S. Foster Dr., Baton Rouge LA 70806
perry@franklinassociates.com
(225) 768-9060, (225) 768-9009 fax

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NOTE: The data contained on pages 6 and 36 through 76 of the proposal have been submitted in confidence and contain trade secrets and/or privileged or confidential information and such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Proposer as a result of or in connection with the submission of this proposal, LITACorp shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit LITACorp’s right to use or disclose data obtained from any source, including the Proposer, without restrictions.

TAB 1 - Executive Summary

Franklin Associates (Franklin) and GrantWorks have partnered to provide LITACorp and political subdivisions throughout the State with excellent and timely technical assistance to obtain and deploy maximum impactful benefits from Infrastructure Investment and Jobs Act (IIJA)/Bipartisan Infrastructure Law (BIL) funding. Our team is continually called on to provide real-time, one-on-one technical assistance on federally funded programs across Louisiana and the country. Whether political subdivisions are seeking funding for water, sewer, and transportation projects, planning initiatives, or the like, our team brings decades of experience on multi-disciplinary projects with focus on both job creation and equity in access.

Through LITACorp, political subdivisions will have access to CDBG funding to serve in a match capacity so that the match requirements do not represent a barrier to access IIJA/BIL funding, particularly for disadvantaged and/or cash-strapped political subdivisions. Our team is committed to equity of access as one of our core values and this effort aligns with that value. We have extensive experience using CDBG dollars as match for federally funded grant project including ensuring that all requirements that are triggered by using CDBG funding are followed in addition to those required by IIJA/BIL. Below is an overview of our firms and the respective role we will take on if engaged by LITACorp. Based on our experience, we are submitting this proposal in response to Staffing Support Area 1, 2 and 3.

The Franklin Team offers LITACorp the experience and expertise of a firm that has successfully written, secured, and administered over 1,200 infrastructure and community development grants representing billions of dollars in federal funding.



Headquartered in Baton Rouge, Franklin Associates, a minority-owned business (MBE) helps clients carry out federally funded grant programs from program design through closeout. With experience working in all 64 parishes in Louisiana, Franklin believes that development, implementation and closeouts of every project requires solid communications, effective coordination, a high degree of flexibility and a focus on finding solutions that benefit the project's end users.

ROLE: Program management, Area 3 Task Lead and staff augmentation across Areas 1, 2 and 3.

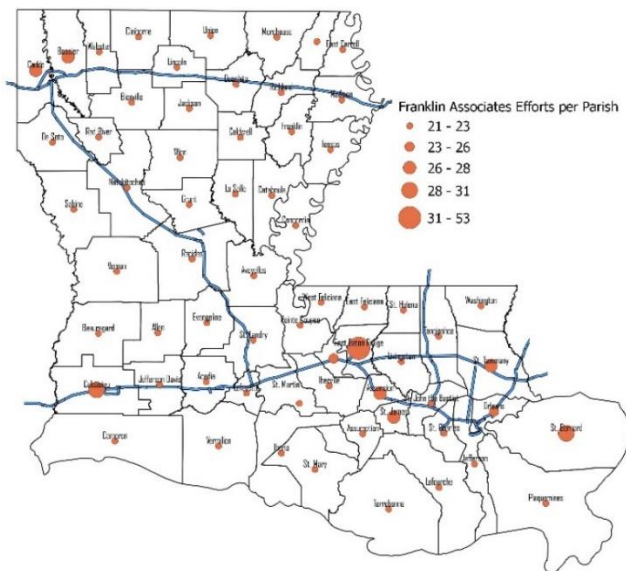
GrantWorks Founded in 1979, GrantWorks has assisted over 450 government entities in designing and delivering a wide range of critical federal and state-funded projects and programs in the areas of infrastructure, housing, transportation, public buildings and facilities, community and economic development, coastal protection, disaster recovery, mitigation, and resilience. With a national workforce of over 390 professionals, including 25+ Louisiana-based staff, GrantWorks continues its mission to develop meaningful partnerships with public sector clients to solve complex infrastructure challenges, improve public service, and build stronger, smarter, and more resilient communities for a better future for all.

ROLE: Area 1 Task Lead, Area 2 Task Lead, and staff augmentation across Areas 1, 2 and 3.

TAB 2 - Proposer and Subcontractor(s) Corporate Information

Company Overview

Franklin was founded by lifelong Louisianan, current firm president and sole company owner, Perry Franklin in the wake of Hurricanes Katrina and Rita in 2005 to assist impacted communities throughout southern Louisiana recover and build back better. Seventeen years later, Franklin has built on this foundation, providing grant management and staff augmentation services across the country. Franklin now includes 32 full time staff with reach back to hundreds of Louisiana based staff to serve all LITACorp's grant application and grant administrative support needs. We exist to serve our clients' grant management needs, able to nimbly adjust our staffing levels to assist grantees according to funding timelines. In 2020, during COVID-impacted staffing difficulties, our staff numbered 300+ as we responded to disaster-related, federally funded staffing augmentation requests across the State. In addition, our team includes experts in IJIA, ARPA, HUD CDBG and FEMA recovery funding sources so we are adept at deploying large federal grant funding to implement infrastructure and housing improvements and spur economic development.



Leveraging our work and relationships in all 64 parishes, Franklin can provide comprehensive grant writing and administrative services to political subdivisions throughout the State.

As you can see in the map to the left, we worked in all 64 parishes on a wide range of projects including helping communities apply for and administer federal grant funding. The larger the dot the more engagements and projects we have worked on. This means we will be able to work with communities throughout the state

effectively and efficiently to help them formulate grant applications and manage resultant grants and projects. In addition, since 2005, we have managed and implemented HUD Community Development Block Grant (CDBG) funded programs. This means we offer expertise in all CDBG rules and regulations necessary for LITACorp and political subdivisions to follow when using CDBG as match.

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Financial Strength

Our company has experienced significant growth since our founding in 2005, when we had a single contract totaling \$22.5 million. Today, our team manages over 100 projects totaling over \$50 million to date. Our current staff of 32 professionals has contributed to a current annual revenue (January 1- November 30, 2022) of \$4.3 million, with a profit of \$1.4 million for the same period this year. The company's current cash flow is \$1.5 million. Audited financial statements for the past three years are in Appendix 2 and our most recent Dun & Bradstreet (D&B) Business Report™ is in Appendix 3.

Integrity

We go above and beyond to serve our state and local government clients to make our community a more resilient and equitable place for all. As a Louisiana-based firm, the Franklin team is passionate about serving the communities in which we live. Giving a voice to the voiceless is part of our team's mission that we identify in all that we pursue. We pride ourselves on operating our company with high integrity, in a culture of high transparency. Our mission is to help communities thrive by maximizing federal funding and ensuring all grant dollars are spent achieving local strategic priorities and needs. Neither our firm nor any of our individual team members has a conflict of interest in working with LITACorp. Additionally, Franklin has not filed or had filed against it any bankruptcy or insolvency proceeding, voluntary or involuntary, nor has it undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors in the last ten (10) years.

Proposer Experience

Overview

We are committed to delivering all services in accordance with LITACorp's RFP framework and IJIA regulations. The Franklin team is actively working with hundreds of cities and parishes/counties engaged in infrastructure and community development initiatives and has been engaged by state and local governments to apply for and/or manage funds received through:

- HUD Community Development Block Grant (CDBG) including all flavors of CDBG (CDBG-Disaster Recovery (CDBG-DR), CDBG-National Disaster Resilience (CDBG-NDR), CDBG-Mitigation (CDBG-MIT))
- FEMA Public Assistance (PA) and Individual Assistance (IA)
- American Rescue Plan Act (ARPA),
- Coronavirus Aid, Relief, and Economic Security Act (CARES), and
- Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States Act (RESTORE)

Managing federal grant funds toward effecting positive change is our passion. We are prepared to harness our collective experience to help political subdivisions apply for funding (AREA 1), manage their grants (AREA 2) and/or help with overall project management (AREA 3). As illustrated below, we have experience in each of the most significant federal grant funding sources passed by Congress in the last 15 years and across the entire lifecycle of grant administration.

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Franklin Team’s Experience with Related Federal/State Grants Similar to IIJA/BIL Grants

REQUIREMENTS	HUD (CDBG, CDBG- DR/NDR/MIT)	FEMA (PA, IA, HMGP)	U.S. Treasury (CARES, ARPA, RESTORE)
Grant Management and Administration	●	●	●
Procurement and Compliance with 2 CFR 200	●	●	●
Shareholder Engagement, Project Identification, Community Assessment, and/or Eligibility Determinations	●	●	●
Project/Program Design and Development	●	●	●
Case/Contract/Project Management	●	●	●
Duplication of Benefits Review	●	●	●
Financial Assistance	●	●	●
Labor/Wage Compliance	●	●	●
Construction Oversight	●	●	●
Uniform Administration Requirements, Cost Principles, and Audit Compliance	●	●	●
Environmental Review	●	●	●
Uniform Relocation Act (URA), Fair Housing, and Section 504	●	●	●
Reporting	●	●	●
Monitoring and Audit Readiness	●	●	●
Recordkeeping and Document Storage/ Retention	●	●	●
Close-Out	●	●	●

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Project Experience and References

In this section we provide both our Project Experience and the required related Reference information as outlined in Attachment IV: Format for Submitting Proposer's References of the RFP.

Project #1 – FRANKLIN ASSOCIATES
Program Manager of Disaster Housing Programs, Statewide, LA (Prime), Service Dates: April 2020 – April 2021
Client Name (Customer Type): Louisiana Housing Corporation (State Government Agency)
Reference: Joshua Hollins, Executive Director, 2415 Quail Dr, Baton Rouge, LA 70808, jhollins@lhc.la.gov , 225.763.8700
History, corporate structure and organization, and # of years in business: This agency is a subset of the State of Louisiana.
Description of Staffing Support Services and Relevance: Since 2016, Franklin has provided staff augmentation, program design, program outreach, program development and program implementation and closeout across 52 distinct task orders. In 2020 and 2021, Franklin Associates managed the setup, staffing and ongoing service delivery for 7 non-congregate shelters in New Orleans, Baton Rouge, and Lafayette for vulnerable homeless populations during the COVID-19 pandemic. This project required swift staffing deployments, creation of processes and 24/7 service provision in multiple site, all during a time when recruiting efforts were hindered by the pandemic. Franklin onboarded and managed over 300 employees. Our personnel worked closely with LHC and local non-profit partners to coordinate award-winning onsite service provision and maintain the safety of the residents. Franklin coordinated housing specialists, resident advisors, and case management personnel, and safety and medical service providers at each of our managed shelters to prepare the shelter residents and coordinate their transitions into permanent housing situations. Franklin was also tasked with providing navigator staffing to support real-time demobilization of numerous homeless shelters across the state. This model of onsite housing navigation was adapted for Hurricane Ida evacuation shelter demobilization. Franklin also provided personnel to manage the statewide Katrina/Rita rental programs, conduct community education/outreach on Emergency Rental Assistance program and deployed staff for CDBG-DR neighborhood landlord programs.
Size of Grant: \$50+M
Grant Program Involved: CDBG-DR, CARES Act
of Staff provided: 300+
Technical Environments Supported: Airtable, Sharepoint
Applicable Staffing Support Areas: 1, 2 and 3

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Project #2 – FRANKLIN ASSOCIATES
Solution 4 Buyout + Pecan Acres Resettlement (2016 Floods), New Roads, LA (Originally Prime, Currently Subcontractor), Service Dates: 2018-2022
Client Name (Customer Type): Louisiana Office of Community Development Disaster Recovery Unit (State agency)
Reference: Patrick Forbes, Executive Director, patrick.forbes@la.gov , 225-219-9600
History, corporate structure and organization, and # of years in business: This agency is a subset of the State of Louisiana.
<p>Description of Staffing Support Services and Relevance: The Franklin Associates team worked closely with the Louisiana OCD-DRU staff to assist in the buyout and relocation of residents of Pecan Acres, a neighborhood that has been plagued with flooding for decades. As of 2022, the residents relocating into a newly built community on higher, safer ground that was designed and built with CDBG-DR funding. On this project, the Franklin team implemented program design, policy development, system of record design, process and procedure development, application intake, provided case management to coordinate document collection to verify program eligibility, and worked with the architect and build team to coordinate and facilitate design charrettes to gain resident input into the layout of the new community and the style of the new homes. As the new homes are built, residents continue to work with the Franklin team to finalize move-in and transfer details.</p> <p>Franklin’s team also provides strategic process and policy development services from inception to completion on this resettlement project as well as the statewide buyout program (first of its kind), and a third community-specific buyout program. In the same timeframe, Franklin provided the same services on the Isle de Jean Charles Relocation effort, a CDBG-NDR funded project. As the projects moved into implementation, the Franklin team provided direct case management services to successfully drive these into reality. Two new communities are currently in final buildout phases in New Roads and Schriever, serving as a national resilience model.</p>
Grant Program Involved: CDBG-DR
Size of grant: \$91M
of Staff provided: 6
Technical Environments Supported: Airtable, Sharepoint
Applicable Staffing Support Areas: 1, 2 and 3

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Project #3 – FRANKLIN ASSOCIATES
Isle de Jean Charles Relocation, Terrebonne Parish, LA (Prime), Service Dates: 2018-2021
Client Name (Customer Type): Louisiana Office of Community Development DRU (State Agency)
Reference: Patrick Forbes, Executive Director, patrick.forbes@la.gov , 225-219-9600
History, corporate structure and organization and # of years in business: This agency is a subset of the State of Louisiana.
<p>Description of Staffing Support Services and Relevance: Franklin Associates served as the prime for the Office of Community Development’s Isle de Jean Charles relocation effort in Terrebonne Parish from 2018-2021. Franklin assisted with policy development and operationalization of program design. Developed System of Record, developed program training for caseworkers and for potential participants, delivered program education to potential participants, managed application intake and eligibility reviews, coordinate homeowner education courses with program participants and coordinated home design selection process, new community decisions including street naming and lot assignments, and provided ongoing participant briefings 2018-2020.</p> <p>Out of this range of responsibilities, Franklin had the chance to stand out with the firm’s ability to formulate a plan, implement the proper approach, and educate and train key stakeholders in the respective area so that the community was able to make informed decisions with the confidence of understanding their current situation as well as possible solutions. This project also gave Franklin an opportunity to show how thorough its development of processes and procedures are as well as implementation in the realm of public engagement.</p>
Grant Program Involved: CDBG-NDR
Size of grant: \$48M
of Staff provided: 5
Technical Environments Supported: Airtable, Sharepoint
Applicable Staffing Support Areas: 1, 2 and 3

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Project #4 – FRANKLIN ASSOCIATES
Vermillion/Iberia/Pointe Coupee, LA, Gustav/Ike Housing Program, (Subcontractor), Service Dates: 2010-2012
Client Name (Customer Type): Louisiana Parishes (Local Government)
Reference: Aimee Killeen, Chief Operating Officer, Providence Engineering, 1201 Main Street, Baton Rouge, LA 70802, aimeekilleen@providenceeng.com , 1-866-960-9623
History, corporate structure and organization and # of years in business: These local municipalities are political subdivisions of the State.
Description of Staffing Support Services and Relevance: Providence Technical Services hired Franklin Associates to assist in policy and program development on these three CDBG-funded municipal efforts. The housing program in Vermillion and Iberia Parish involved the elevation of homes in select communities to increase resilience. In Pointe Coupee Parish, the project was fully roofing based. The Franklin team provided end-user sensitive guidance on program design. The Franklin team also developed all community education materials and delivered training to community residents through outreach events in each parish designed to prepare residents to apply and navigate the programs. Franklin also trained and provided case manager staff in each parish to directly assist residents in the application and navigation process to reach successful project funding statuses on an individual basis.
Grant Program Involved: CDBG-DR
Size of grant: Subset of \$565M parish allocations
of Staff provided: 5
List of grant applications over past 3 years: not applicable
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 2 and 3

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Project #5 – FRANKLIN ASSOCIATES and GRANTWORKS
Grant Management and Administration Related to the American Rescue Plan Act Funding, Louisiana (Subcontractor), Service Dates: March 2022 – December 2026
Client Name, Customer Type: City of Baton Rouge Parish of East Baton Rouge, Louisiana (Local Government)
Reference: Angie Savoy, Assistance Finance Director, City-Parish of East Baton Rouge, P.O. Box 1471, Baton Rouge, Louisiana 70821, Telephone: 225-389-3000, Email: asavoy@brla.gov
History, corporate structure and organization and # of years in business: The City of Baton Rouge/Parish of East Baton Rouge is a local political subdivision.
Description of Staffing Support Services and Relevance: Franklin Associates and GrantWorks are partnered with CSRS on this project. We provide thorough and responsive consultation and subject-matter expertise on the programmatic expectations and compliance requirements of the City's/Parish's ARPA program as well as reporting and training guidance. We support the City-Parish of East Baton Rouge's administration of their American Rescue Plan Act allocation via the following services: <ul style="list-style-type: none"> • Providing expert ARPA programmatic and policy advice • Assisting with reporting activities • Identifying potential program improvements and maximizing ARPA funding • Providing oversight and guidance to comply with the U.S. Treasury Final Rule and 2 CFR 200 • Assisting with requests for information, justification, and eligibility requirements • Assisting with tasks to prepare for reporting requirements • Assisting in the development of program guidelines, SOPs, policies, and procedures • Assisting with contract review • Participating in meeting with department heads and document retention • Providing QA/QC assistance • Assisting in grant application close-outs
Grant Program Involved: American Rescue Plan Act of 2021, administered by the U.S. Department of Treasury
Size of grant: \$165.4M
of Staff provided: 6
List of grant applications over the past (3) three years: not applicable
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 2 and 3

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Project #6 – GRANTWORKS
175+ Texas Cities and Counties, Grant Administration and Project Management Services for the American Rescue Plan Act of 2021 (Prime), Service Dates: June 2021 – December 2026
Client Name (Customer Type): 175+ Cities and Counties, Texas (Local Governments) Reference: Leon Scaife, Purchasing Agent, Bastrop County, 804 Pecan Street, Bastrop, Texas 78602, Telephone: 512-581-7110, Email: leon.scaife@co.bastrop.tx.us Telephone: 512-581-7110, Email: leon.scaife@co.bastrop.tx.us Reference: Helen Ramirez, AICP, Interim City Manager, City of Brownsville, City Hall, Second Floor, 1001 E. Elizabeth Street, Brownsville, Texas 78522, Telephone: 956-548-6007, Email: helen.ramirez@brownsvilletx.gov
History, corporate structure and organization and # of years in business: Each local political subdivision is its own entity.
Description of Staffing Support Services and Relevance: The U.S. Treasury Department (U.S. Treasury) has allocated \$350 billion to state and local governments to help cover expenditures and mitigate the coronavirus pandemic’s economic impact under the American Rescue Plan (ARPA) Act of 2021. GrantWorks provides ARPA-related professional grant administration and project management services to multiple cities/counties across Texas. Services provided include ARPA compliance expertise, grant management, guidance on project selection, environmental processing, infrastructure construction oversight, reporting, monitoring, and project close-out.
Grant Program Involved: American Rescue Plan Act of 2021, administered by the U.S. Department of Treasury
Size of grant: \$600M
of Staff provided: 34
List of grant applications over the past three (3) years: not applicable
Technical Environments Supported: GrantWorks uses a custom-built integrated project and financial management platform to manage project compliance, progress, expenditures, risks, and reporting for ARPA projects. Each identified project is entered in GrantWorks 20/20 project management database, where team members have access to project data required to monitor quality, compliance, and progress. GrantWorks 20/20 creates project reports that quickly convey the budget and status of the client’s overall ARPA implementation plan.
Applicable Staffing Support Areas: 1, 2, and 3

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Project #7 - GRANTWORKS
50+ Texas Cities and Counties, Community Development Block Grant-Mitigation (CDBG-MIT) Program for Infrastructure Improvements, Texas (Prime), Service Dates: January 2021 – Present
Client Name, Customer Type: 50+ Cities and Counties, Texas (Local Government)
Reference: Melissa Pena, Director of Capital Projects, City of Rosenberg, 2110 4 th Street, Rosenberg, Texas 77471, Telephone: 832-595-3592, Email: melissa.pena@rosenbergtx.gov
History, corporate structure and organization and # of years in business: Each local political subdivision is its own entity.
Description of Staffing Support Services and Relevance: The Texas Community Development Block Grant-Mitigation (CDBG-MIT) infrastructure improvements program aims to increase disaster resilience and reduce or eliminate the long-term risk of loss of life, injury, damage to and loss of property, and suffering and hardship, lessening the impact of future disasters. GrantWorks provided comprehensive grant management services for this large-scale Infrastructure Improvement program spanning 50+ counties and cities across Texas. During the pre-award phase, our staff worked closely with participating cities and counties to identify and develop grant-eligible infrastructure projects to support community mitigation objectives. Our grant writers and application department subsequently developed and submitted 65+ applications for grants totaling over \$609M in requests and approximately \$6M in leveraged amounts for CDBG-MIT infrastructure improvement projects. Now in the post-award phase, we continue to work with city and county grantees to implement strategic and high-impact infrastructure projects that help mitigate disaster risks and reduce future losses. GrantWorks is administering, managing, and completing infrastructure projects that include improvements to drainage structures (e.g., roadside ditches, culverts, flood gates, retention ponds, etc.), street systems, wastewater infrastructure (collection and treatment systems), water infrastructure (distribution, treatment, and storage systems), and other mitigation enhancements. These projects serve various beneficiary areas, from target areas within cities and counties to broader jurisdiction-wide efforts.
Grant Program Involved: U.S. Department of Housing & Urban Development, Community Development Block Grant-Mitigation (CDBG-MIT) program funds administered by the Texas General Land Office
Size of grant: \$440M
of Staff provided: 64
List of grant applications over the past (3) three years: 65+ CDBG-MIT applications
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 1, 2 and 3

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Project #8 - GRANTWORKS
Texas Cities & Counties, Hurricane Harvey Community Development Block Grant-Disaster Recovery (CDBG-DR) Local Infrastructure Programs, Texas (Prime), Service Dates: March 2021 - March 2024
Client Name, Customer Type: 50+ Cities and Counties, Texas (Local Governments) Reference: John Strothman, Project Manager, Aransas County, 2840 SH 35 N, Rockport, Texas 78382, Telephone: 443-370-8488, Email: jstrothman@aransascounty.org History, corporate structure and organization and # of years in business: Each local political subdivision is its own entity.
Description of Staffing Support Services and Relevance: Under the Texas Community Development Block Grant-Disaster Recovery (CDBG-DR) Hurricane Harvey Local Infrastructure program, GrantWorks worked with eligible grantees to determine their Hurricane Harvey disaster-related needs and develop and implement strategic and high-impact recovery projects. These projects address catastrophic storm damage to critical local infrastructure in cities and counties across Texas. GrantWorks provided comprehensive grant management services for this large-scale, post-disaster Infrastructure Improvement Program spanning dozens of cities and counties across Texas. During the pre-award phase, our staff worked closely with participating cities and counties to identify and develop grant-eligible infrastructure projects supporting community disaster recovery efforts. Our grant writers and application department subsequently developed and submitted 65+ applications for grants totaling over \$188 million for infrastructure projects. Now in the post-award phase, we continue to work with city and county grantees to implement critical infrastructure projects to help impacted communities become stronger and more resilient. For this large-scale federal and state-funded program, GrantWorks is administering, managing, and completing projects that include improvements to drainage structures (e.g., roadside ditches, culverts, flood gates, retention ponds, etc.), streets systems, wastewater infrastructure (collection and treatment systems), and water infrastructure (distribution, treatment, and storage systems). These projects serve various beneficiary areas, from target areas within cities and counties to broader jurisdiction-wide areas including low-and moderate-income areas.
Grant Program Involved: U.S. Department of Housing & Urban Development, Community Development Block Grant-Disaster Recovery (CDBG-DR) program funds administered by the Texas General Land Office
Size of grant: \$188M
of Staff provided: 64
List of grant applications over the past (3) three years: 65+ CDBG-DR applications
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 1, 2 and 3

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Project #9 - GRANTWORKS
City of Galveston, Hurricane Ike CDBG-DR Infrastructure Improvement Program, Galveston, Texas (Prime), Service Dates: October 2014 – October 2021
Client Name (Customer Type): City of Galveston, Texas (Local Government)
Reference: Trina Jankowski, Construction Project Manager, City of Galveston, P.O. Box 779, Galveston, Texas 77553, Telephone: 409-797-3966, Email: tjankowski@galvestontx.gov
History, corporate structure and organization and # of years in business: The City of Galveston is a local political subdivision.
Description of Staffing Support Services and Relevance: The City of Galveston has worked with GrantWorks since 2014 when the Texas General Land Office and the City of Galveston sought a professional grant management firm to administer the remaining Hurricane Ike CDBG-DR projects. The Texas General Land Office funded the City of Galveston through three cycles: Round 1 for \$107M, Round 2.1 for \$24M, and Round 2.2 for \$81M, for a total of over \$212M for infrastructure and non-housing projects ranging from economic development to disaster relief and utility system improvements. The City of Galveston received funding for over 20 projects, including the 59 th Street Pump Station, six street reconstructions, seven ground storage tank improvements, a new central fire station, a new public works facility, neighborhood improvements benefitting the Galveston Housing Authority's Cedars at Carver Park, rehabilitation of the Airport Wastewater Treatment Plant, and other improvements. The funds provided reliable and continuous potable water, ensured roadway and city service function, and provided safe and efficient wastewater treatment.
<p>As the Grant Administrator for this program, GrantWorks provided grant administration and project delivery services to the City including application preparation, unmet needs assessment, eligible activities determination, procurement, project and financial management, environmental review, construction bidding and management, contract management and operations, labor standards and Davis-Bacon compliance, civil rights, fair housing, and Section 3, program compliance, monitoring, and close-out.</p>
Grant Program Involved: CDBG-DR
Size of grant: \$212M CDBG-DR and \$10M FEMA PA
of Staff provided: 10+
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 2 and 3

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Project #10 - GRANTWORKS
City of Houston Hurricane Ike Community Development Block Grant-Disaster Recovery (CDBG-DR) Round 2.2 Fund Infrastructure Improvement Program, Houston, Texas (Prime), Service Dates: October 2014 – March 2019
Client Name, Customer Type: City of Houston, Texas Reference: Stedman Grisby (Former Division Manager, Disaster Recovery, City of Houston), Managing Director of Multifamily Development, The Brownstone Group, Inc., 6517 Mapleridge Street, Houston, Texas 77081, Telephone: 832-367-0737, Email: stedman@thebrownstonegroup.net
History, corporate structure and organization and # of years in business: The City of Houston is a political subdivision of Harris County.
Description of Staffing Support Services and Relevance: After Hurricane Ike landed on September 13, 2008, the City of Houston sustained flooding, causing critical street and drainage infrastructure to fail. Floodwaters submerged the City's roadways, and the existing storm sewer/drainage system infrastructure could not handle the volume of water generated during the storm. To repair the infrastructure and reduce the possibility of failure in future storms, the City of Houston used \$22 million in CDBG-DR funds to improve drainage in four lower-income central city neighborhoods including constructing storm sewers, drainage ditches, culverts, and other flood and drainage improvements serving the Near Northside. GrantWorks restored the function of the road for primary access and emergency vehicle use and reconstructed an open ditch storm drainage system in the Greater Fifth Ward, Near Northside, and Old Spanish Trail/South Union neighborhoods. As the Grant Administrator for these activities, GrantWorks provided grant administration and project delivery services to the City. Services included: application Preparation, including LMI National Objective Determination and Documentation; Eligible Activities and National Objects; Procurement for Construction Service; Coordination with multiple City of Houston departments and project engineers; Financial Management; Contract Management and Operations; Labor Standards and Davis Bacon; Program Compliance, Monitoring, and Close-out; Project Files and Documentation Maintenance.
Grant Program Involved: CDBG-DR
Size of grant: \$22M
of Staff provided: 4
List of grant applications over the past (3) three years: not applicable
Technical Environments Supported: not applicable
Applicable Staffing Support Areas: 1, 2, and 3

Staffing Support Resources

Franklin Associates tightly manages resource utilization coupled with personnel training to assure the highest level of service to all our clients, the bulk of whom are public sector entities. We work closely with numerous state agencies and municipalities, providing high quality advisory services as well as grant management/project management services. Our mission/vision/values are focused on the core competency of our personnel being wrapped in our motto of "Putting People First." We work to provide timely quality services with an acute focus on customer service throughout the project spectrum. End users of any program, personnel charged with implementation, leadership needing pinpointed reporting – all are key stakeholders in every process and their needs must be considered for smoothly delivered projects. Our team includes multiple certified Project Management Professionals, multiple AICP-certified planning personnel, and myriads of FEMA certified personnel.

Franklin's personnel undergo rigorous customer service training prior to deployment on external facing projects. Each designated staff member sent on a staff augmentation effort is provided project-specific policy and procedures training prior to initiation as well.

Franklin's focus on customer service permeates the firm's Advisory Services practice as well as its Grant Management practice. Our clients know that our commitment to fair and transparent processes, and clear education to all stakeholders, are at the top of our to-do list on any given day.

The Franklin talent pool expands and diminishes based on contracting needs. Our core team of permanent full-time employees is supplemented on an ongoing basis by project-specific personnel as needed. While we have had more than 300 employees in some years, Franklin currently has 32 full-time employees. Similarly, Franklin Associates' annual revenues rise and fall accordingly. Annual revenues have exceeded \$20M, with the proven capability of managing payrolls as needed for large and small efforts.

Subcontractor Company Overview

Founded in 1979, GrantWorks has assisted over 450 government entities in designing and delivering a wide range of critical federal and state-funded projects and programs in the areas of infrastructure, housing, transportation, public buildings and facilities, community and economic development, coastal protection, disaster recovery, mitigation, and resilience. Over 40+ years, they have successfully secured and managed over \$8 billion in grant-funded projects focused on improving the communities in which they live, work, and play. With a national workforce of over 390 professionals, including 25+ Louisiana-based staff, GrantWorks continues its mission to develop meaningful partnerships with public sector clients to solve complex infrastructure challenges, improve public service, and build stronger, smarter, and more resilient communities for a better future for all. Bruce J. Spitzengel is the President and sole owner of GrantWorks.

Subcontractor Integrity

GrantWorks' mission is to consistently provide the most efficient and professional grant management services possible. Their mission establishes GrantWorks' purpose and reason for

being. Meanwhile, integrity is one of GrantWorks' core values and states that they will maintain the highest standards of professionalism. It means they behave ethically and always do the right thing, even behind closed doors. This core value is one of the company's fundamental beliefs and priorities driving all behavior.

Subcontractor Background History

GrantWorks focuses on helping cities, counties and parishes achieve their infrastructure, connectivity, mobility, community and economic development, and resilience goals. Their core focus is on grant writing and administration with a proven record of developing successful grants including infrastructure project identification, grant completion, grant application submission, grant management, and other related services to the IJA/BIL. GrantWorks has doubled in size in the past two years.

In partnership with city and county clients, GrantWorks has successfully secured and administered over \$8 billion in federal and state assistance for hundreds of localities encompassing thousands of successful projects. They have hired dozens of staff as needed to provide staffing support on engagements like this for State agencies throughout the country.

Subcontractor Financial Strength

Due to the sensitivity and confidentiality of this information, GrantWorks has provided this information directly to LITACorp via email on December 22, 2022 from Cecelia Johnson at cecelia@grantworks.net to Leslie Anne Durham at leslie@LITACorp.org. GrantWorks' submission is clearly marked as part of the Franklin Team submission.

Subcontractor Contact Information

Name: Ken Pevovar, PMP, Senior Vice President of Program Management, GrantWorks, Inc.
Address: 2201 Northland Drive Austin, Texas 78756
Telephone Number: 732-740-7493
Fax Number: 512-420-0302
Email address: ken@grantworks.net
Website: www.grantworks.net

TAB 3 - Certification Statement

Attachment V: Certification Statement (Form)

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of this Request for Proposals (RFP), including attachments.

OFFICIAL CONTACT LITACorp requests that the Proposer designate one (1) person to receive all documents and the method in which the documents are best delivered. The Proposer should identify the Contact name and fill in the information below: (Print Clearly)

Date: December 15, 2022

Official Contact Name: Perry J. Franklin

A. E-mail Address: Perry@franklinassociates.com

B. Facsimile Number with area code: (225) 768-9060

C. US Mail Address: 250 S. Foster Drive, Baton Rouge, LA 70806

The Proposer shall certify that the above information is true and shall grant permission to the LITACorp to contact the above-named person or otherwise verify the information provided. By its submission of this proposal and authorized signature below, Proposer shall certify that:

1. The information contained in its response to this RFP is accurate;
2. Proposer shall comply with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein;
3. Proposer shall accept the procedures, evaluation criteria, mandatory contract terms and conditions, and all other administrative requirements set forth in this RFP;
4. Proposer's Financial Proposal shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal response;
5. Proposer understands that if contract negotiation period exceeds thirty (30) days or if the selected Proposer fails to sign the contract within seven (7) calendar days of delivery of it, the State may elect to cancel the award and award the contract to the next most advantageous responsible Proposer; and
6. Proposer shall certify, by signing and submitting a proposal, the Proposer certifies that their company, any subcontractors, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in "Audit Requirements in Subpart F of the Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards" (formerly OMB Circular A-133). (A list of parties who have been suspended or debarred can be viewed via the internet at <https://www.sam.gov>).

Authorized Signature: 

Typed or Printed Name: Perry J. Franklin

Title: President/Owner

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Company Name: Franklin Associates, LLC

Address: 250 S. Foster Drive

City: State: Zip: Baton Rouge, LA 70806

SIGNATURE of Proposer's Authorized Representative



DATE December 15, 2022

TAB 4 - Proposed Staffing Support

In this section we describe how we will augment staff as needed; how we have organized our staff to carry out this work including short biographies of each proposed team member; our project management approach across all staffing areas; and our approach to support political subdivisions and LITACorp in AREA 1: Pursuing IJJA Grant Funding; AREA 2: Managing Successful IJJA Grant Funding; and AREA 3: Project Management.

Staffing Augmentation and Capacity

If LITACorp should need additional reach back support, both Franklin and GrantWorks can pull from additional experienced staff and/or recruit new staff to work on this initiative.

The goal of our hiring processes is always to locate the appropriate team member for specific staffing augmentation placements. At times the best person for a task is an internal staff member, while at other times the person most suited to a task is a new hire. Our teams evaluate existing capacities and experiential backgrounds against each incoming assignment, managing resources to the needs. Our staffing processes focus on assuring that all qualified individuals have access to opportunities, and from the talent pool that emerges we provide transparency related to expectations, bolster that baseline with specific training for the deployment, and utilize cloud-based project management and timekeeping systems to assure real-time views of progress against goals. Our retention levels are very high because of the ongoing communication modes available through Teams and SharePoint, which allow all team members to have real-time access to the leadership of the firm.

Franklin's team has proven successful at recruiting and deploying hundreds of personnel in extremely tight timelines (i.e., less than 48 hours) when needed. All personnel are hired on as full-time employees with access to company bonus structures.

As important as our ability to hire and recruit new staff to meet LITACorp needs, is our commitment to the consistent onboarding and training of all new staff so that we retain high quality staff that can provide excellent services to our clients. We promote an environment of continuous learning and support the on-going professional development of all of our staff.

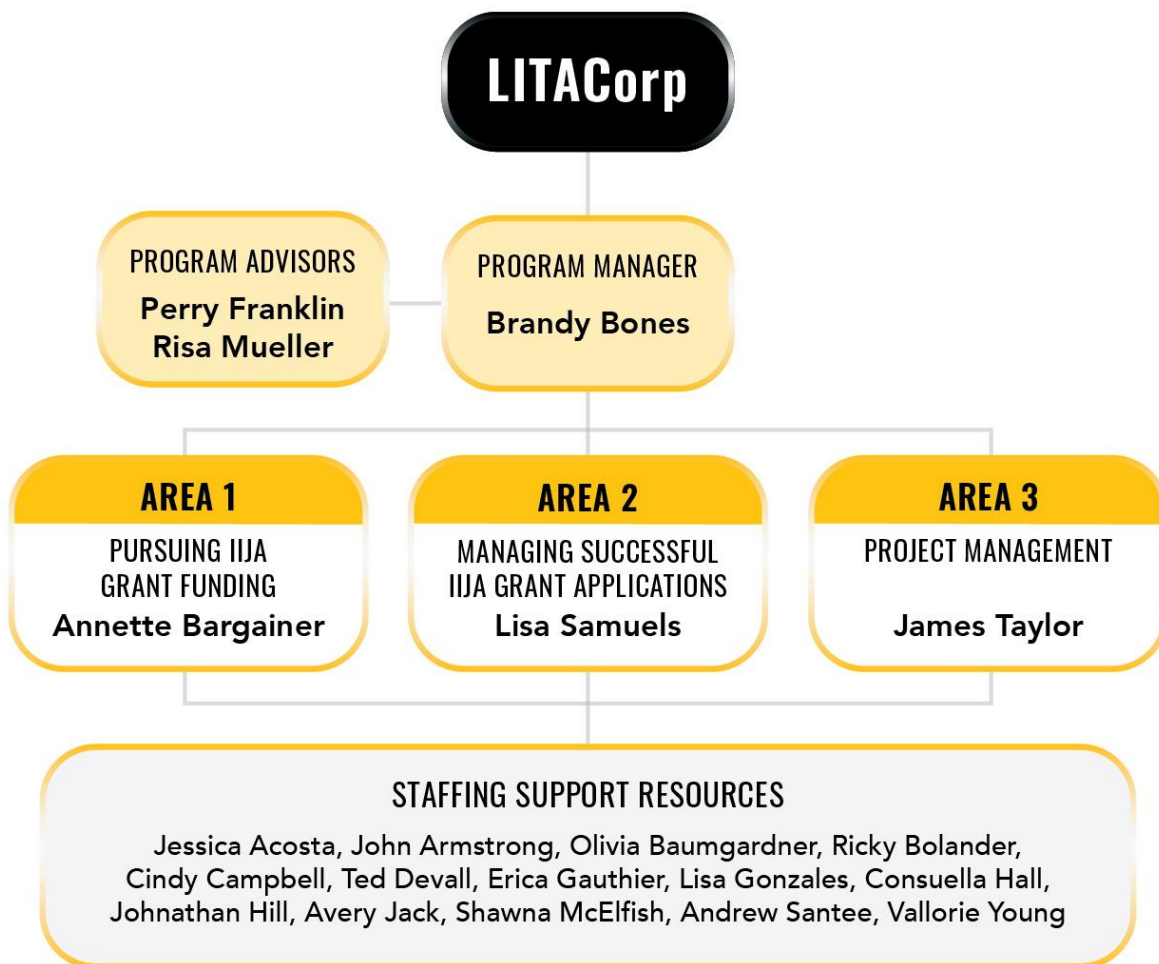
Recruiting / Onboarding Process



Our Team

Organization Chart

We have organized our team under a Program Manager supported by Program Advisors and with Task Leads identified for each of the Staffing Support Areas. Underneath each Area Task Lead is the staff that are available and qualified to support across any of the Staffing Support Areas 1, 2, and 3. These staff are available for the full term of the contract as requested by LITACorp. We have included short biographies of the Leadership and Staffing Support Resources below. Resumes are included in Appendix 4.



Leadership Team



Brandy Bones, MBA, PMP & AICP will serve as the **Program Manager** serving as day-to-day contact with LITACorp, leading contract and program set up and overseeing the hiring and training of all staff necessary to assist LITACorp with serving political subdivisions. She has 17+ years of experience working throughout the United States assisting state and local governments administer billions of dollars in federal grant funding including HUD and FEMA recovery funding as well as ARPA and America Rescue and Recovery Act (ARRA) funding. Prior to joining Franklin, Ms. Bones led a 90+ person team that collectively managed over \$6 billion in federal funding working across the country. She has written grant applications and developed Action Plans as well as grant application review procedures and checklists for State agencies charged with administering large federal grant programs. She is also an expert in CDBG, CDBG-DR/NDR and MIT rules and regulations having worked with over a dozen states in the country on their HUD funded programs and as a training and technical assistance provider to HUD.



Perry Franklin, MBA, President and Founder of Franklin Associates will serve as **Program Advisor** and ensure the team has the resources necessary to complete the scope of services on time and within budget. Perry has 17+ years of experience managing and advising project-based staff augmentation and 30+ years of experience with stakeholder and community engagements in Louisiana and other states. With 1,000+ employees hired for projects since the inception of Franklin Associates, Perry has been able to touch projects spanning all sectors of public work and has a proven track record of assembling the right team of both employees and subcontractors for each client.



Risa Mueller, PMP, will serve as **Program Advisor** and has 30+ years of strategic communications, program management, and staff augmentation experience. Her experience includes developing, implementing, and evaluating project communications and outreach plans for a wide variety of disciplines, including public services, planning, housing and transportation. Cumulatively, she has successfully managed hundreds of millions of dollars that have flowed through Louisiana state agencies to support and strengthen low-income families and communities.



Annette Bargainer, AREA 1 Task Lead. Annette Bargainer has 21 years of grant application experience. She develops and writes competitive grant applications for projects ranging from \$50,000 to over \$1 million on behalf of clients. Annette prepares proposals by researching, gathering internal and external data to support grant requests, writing drafts, and obtaining approvals. She identifies projects and funding needs, and opportunities and attends strategy meetings and communicates the proposal strategy and progress to stakeholders and gets input and signoff on content from others as needed.



Lisa Samuels, AREA 2 Task Lead. Lisa Samuels has 23 years of experience in private-sector finance and working on federally funded grant programs. For eight years, she managed the Louisiana Office of Community Development-Disaster Recovery Unit CDBG-DR-funded infrastructure programs. Lisa assists with client development, opportunity identification, grant application development, planning activities, project submittals, and tracking through grant closeout and compliance. She coordinates and oversees housing and infrastructure programs with multiple projects at various stages of implementation and interacts effectively with local, state, and federal agency officials and staff members in meetings and through written memos, emails, formal letters, and telephone conversations. Lisa pays attention to detail regarding project management's financial and technical aspects, including review of program forms, financial and real estate documents, payment requests, service provider invoices, progress reports, and contract amendments.



James Taylor, AICP, AREA 3 Task Lead (AICP) has over 26 years of professional experience including helping clients understand the impact of and return on their public investments utilizing a combination of website, social media and email campaign analytics. He also has extensive experience managing the public engagement aspects of recreation and transportation planning projects including using GIS to make sense of data through spatial mapping to see where and how outreach efforts are working and where outreach is having intended impact and where additional work remains. As a certified planner, James has also worked on over 100 projects that include: park and recreation facility designs, regional recreation and open space master plans, commercial landscape design, ecological and habitat restoration plans, cultural and heritage tourism plans, and redevelopment master plans.

Staffing Support Resources



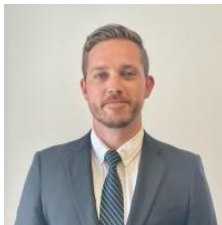
Jessica Acosta provides support throughout the entire grant application lifecycle, from inquiry to application, to reporting and archiving files after a grant application is submitted. Jessica assists in completing grant application tasks, guides clients through grant and funding stream application processes, and liaises with grant subject matter experts. She also facilitates integrated stakeholder communications and performs document quality reviews to ensure grant applications comply with formatting and content requirements.



John Armstrong has over 12 years of experience analyzing data sets across many sectors, including disaster recovery, property and casualty insurance, community development, small-business retail, and governmental relations and compliance projects. He has worked specifically with governments in southern Louisiana with recovery from Hurricanes Gustav, Ike, Isaac, and Laura and the August 2016 major flood event. John has worked for the Louisiana Office of Risk Management and the Louisiana Office of Community Development-Disaster Recovery Unit. John is currently working through GrantWorks with the Texas General Land Office on direct allocations to Harris County and the City of Houston for disaster recovery from Hurricane Harvey.



Olivia Baumgardner, Grant Writer. Olivia Baumgardner has four years of community development experience along with four years of grant application writing experience. Before coming to GrantWorks, Olivia worked at a regional planning commission writing state and federal grants for a seven-county region in southeastern Illinois. During her tenure at the commission, she served as the primary grant writer and handled all environmental clearances needed for those grants. Olivia understands community needs and how to best relay those needs in all grant applications she writes. She works to identify potential grant opportunities and assess their utility and feasibility given GrantWorks clients' needs and capacities. She meets with clients, coordinates the application process, creates and compiles application documents, and works under tight deadlines.



Ricky Bolander, Cost Estimator/Senior Project Analyst. Richard "Ricky" Bolander is a financial manager, and project controls professional with over 11 years of experience, including program and project management, cost control, and scheduling. Ricky contributes to project planning, budgeting, and overall strategy, conducts and presents feasibility analyses for proposed projects, and establishes key performance indicators. He also evaluates the overall project, analyzing project data and producing insights to optimize performance.



Cindy Campbell, Senior Grant Analyst. Cindy Campbell has 23 years of experience managing federally funded grant programs for the State of Louisiana, including the Louisiana Housing Corporation and Louisiana Office of Community Development-Disaster Recovery Unit. This experience includes program management from implementation to closeout. She has worked with federal, state, and local level agencies. Cindy's most significant experience is in compliance and monitoring of regulatory requirements of all phases of various HUD-funded programs. As the Manager of the Small Rental Property Program, Cindy provided leadership for the teams handling appeals, closings, and the call center. She moved to the compliance department to work on monitoring the parishes for proper handling of policies and procedures, procurement, and federal regulations for Low Income Housing programs.



Ted Devall has more than 20 years combined experience in community development, direct residential construction, and management. Devall's experience includes ground-level interactions with contractors, homeowners, volunteer programs, and grant program administrators. He also brings a background of project oversight, training, nonprofit leadership, capacity building, operationalizing systems, and monitoring and improving performance of multiple field providers across the state to the team.



Erica Gauthier has over ten years of experience with CDBG and CDBG-DR grants and over seven years of state-level experience as a Grant Analyst and Project Analyst. She served as the Finance Lead for the \$1B Restore Louisiana program at the Louisiana Office of Community Development-Disaster Recovery Unit. She specializes in data analysis and reporting, using her years of experience to ensure projects meet HUD program requirements. Erica monitors and evaluates projects, analyzes project data, produces insights to optimize performance, identifies problems and shortfalls, and proposes solutions. She prepares, reviews, and maintains project documentation and financial reports. Erica has a BS in Education from Louisiana State University.



Lisa Gonzalez is a results-orientated accounting professional with broad experience in a deadline-driven environment. Lisa has eight years of experience with the state as an Accountant, Finance Management, and Chief Financial Accountant and seven years in private-sector finance. Her management experience includes developing budgets, preparing internal and external financial statements, and ensuring GAAP compliance and regulatory guidelines. Lisa has worked with housing and infrastructure grants for many years, including directly with the state and now with GrantWorks. She is currently coordinating, reviewing, evaluating, and reporting grants at various stages to determine compliance with requirements and standards. Lisa has a BS in Business Administration focused on Accounting from Texas State University.



Consuella (Connie) Hall, JD has over 15 years of experience spanning leadership roles in Louisiana's public and private sectors. She spent nearly seven years with the Louisiana Office of Community Development-Disaster Recovery Unit and four years with the Louisiana Housing Corporation. As a Senior Grant Analyst, Connie helps to prepare, maintain, and provide project budget information. She works with project managers to provide project scope, cost, and schedule information for grant programs, budgets, financial forecasting, and cash flow projections. She prepares reports on projects and grant funding, provides information for audits on project funding procedures used for managing project funding and expenditures, and provides oversight of subrecipients.



Johnathan Hill is a strategic communications and public outreach expert and currently serves as Franklin Associates' advisory services practice lead. With over 10 years of program implementation and outreach, Johnathan has honed his skills creating and managing engagement plans in different sectors of public projects including transportation, higher education, disaster management and more. Johnathan is currently leading the public outreach strategy for East Baton Rouge Parish's MOVEBR initiative, the largest transportation infrastructure investment in the parish's history.



Avery Jack has over twenty years of Call Center Experience with 10 years in Call Center Management and Implementation. Currently he is Managing the Franklin Call Center overseeing full time Call Center Agents dedicated to the EBR Emergency Rental Assistance Program. Avery also has over 5 years of disaster recovery experience working with FEMA following Hurricanes Katrina, Rita, Wilma, Gustav and Ike. He also provided Case Management for Catholic Charities of the Diocese of Baton Rouge during the aftermath of the 2016 Floods. Avery has a track record of proven agent improvement, improving morale and resolving technical issues as they arise within his staff.



Shawna McElfish has six years of grant writing, grant administration, and project management. She joined GrantWorks in October 2019 as an Application Specialist and has quickly moved up the ranks. As the Director of Application Services, Shawna works and coordinates with municipalities, chambers of commerce, local businesses, economic development corporations, and other local entities to develop application projects. Other tasks included conducting research, gathering internal and external data to support grant requests, writing drafts, obtaining approvals, monitoring the progress of deadlines, and preparing application materials. Shawna writes grants primarily for community and economic development infrastructure projects. She is detail orientated and organized, with strong communication skills. Shawna is also a Texas CDBG Certified Administrator.



Andrew Santee has directed multiple public engagement projects for the Louisiana Department of Transportation, East Baton Rouge Parish, and the Community Foundation of Southwest Louisiana. He has experience working on federally funded grant programs including HUD CDBG-DR Hurricane Ida recovery for the Louisiana Housing Corporation as well as ARPA funding for East Baton Rouge where he helped clients implement and develop training materials for their use of SLFRF. A recently transitioned veteran, he served as an Armor Officer for seven years before being discharged as a Captain. During his time in the military, he deployed to Afghanistan and Korea, and served in a number of leadership, operational planning, and logistics roles.



Vallorie Young has 14 years of grant management experience working on state-level CDBG and HOME housing and FEMA hazard mitigation programs. Vallorie has experience working with the Baton Rouge Redevelopment Authority, the Louisiana Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP), and the Louisiana Office of Community Development-Disaster Recovery Unit. She assists with client development, opportunity identification, grant application development, planning activities, project submittals, and tracking through grant closeout and compliance. She coordinates and oversees housing and infrastructure programs with multiple projects at various stages of implementation and interacts effectively with local, state, and federal agency officials and staff members in meetings and through written memos, emails, formal letters, and telephone conversations.

Project Management across all Staff Support Areas

The Franklin Team will use automated project checklists and workflows built into our Airtable project management system to keep projects and communications on track. We build checkpoints to identify bottlenecks and risks so potential issues are discovered at the earliest point in the process and addressed before they create a problem. We will meet with political subdivisions on a regular basis (twice a week is typical) to ensure constant communication on pressing issues and bi-weekly program check-in meetings with LITACorp for focused problem-solving and advance planning to ensure we are meet all funding commitment and expenditure deadlines. We will also provide a line of continuous communication for ad-hoc consultation when needed as questions pop up. As we do on all projects, we will strive to complete our work and services ahead of time in as many areas as possible including contract reviews, eligibility planning, SOP development, risk assessments, and schedules.

The Franklin Team will deliver weekly status reports to LITACorp that will include assignment progress in terms of hours spent, current status of work in progress, plans for next reporting period and any significant issues. These status reports can be delivered more frequently at LITACorp’s request.

Our diverse team is experienced in various project types so regardless of what IJJA funded projects political subdivisions want to fund, all staff assigned to this project have full access to the knowledge and depth of all Franklin and GrantWorks staff (not just those assigned to the project). This means LITACorp can tap all our staff to address even the thorniest project scoping or compliance questions whether it involves: labor standards, environmental compliance, acquisition and URA, reporting, procurement, contracting, data management, or planning.

At LITACorp’s direction, we will assign staff to each jurisdiction to provide the best customer service possible and provides additional support from our other internal departments. We ensure completeness on the front end, and our key to success is communication and processes that keep the client included, informed, and respected throughout the entire project lifecycle. We go above and beyond to ensure that all projects are successful. We encourage recipients to maximize the impact of funds by leveraging dollars, creating private/public partnerships wherever possible, and leveraging other funding sources, as applicable. We understand that many of our clients have

grants and financial management departments that will continue to be in place after they expend the IIJA/BIL funds. Our staff seek to understand and work within existing processes, providing compliance guidance and support, where needed, to make the most of their IIJA/BIL allocation. Our goal is to collaborate and offer management services that complement and integrate with existing structures. In this regard, we view this as an opportunity to work with political subdivisions to build their capacity long after our work is complete.

AREA 1: Pursuing IIJA Grant Funding

For some political subdivisions, this may be the first time they are assembling a request for federal funding at this scale and for many more, their first time applying for funding that will combine federal funding with other federal funding sources (in this case, IIJA/BIL and CDBG). Regardless of the project, our team will develop application policies and procedures, checklists, and FAQs for political subdivisions so they can easily participate in application for funding and determine what are eligible activities so they can start to consider how they may engage with the process.

The Franklin team has successfully delivered more than 5,000 in-person events in Louisiana alone educating communities and local governments about available funding and local initiatives.

In addition, our staff will partner with applicants to build trust and ensure that all applicants are collecting the necessary information and providing technical assistance in all areas including cost benefit analyses and environmental reviews. Each political subdivision will be different in terms of what they need to get their application completed and submitted. Our assistance will be tailored to meet the strategic priorities and capacity of each political subdivision. Consistent and effective communications protocols are a pivotal part of successful applications. We will develop outreach and training efforts utilizing our well-honed best practices with a particular focus on engaging communities that may need extra help to apply for funding. This will be done through multi-layered public outreach and stakeholder meetings for the political subdivisions.

The Franklin Team will work side by side with political subdivisions to help them conceive, design and compile compelling applications that are technically feasible, can be accomplished within budget and completed by state and federal timelines. We will review all applications to ensure each file is completed and all required documents have been submitted. Program procedures will include checklists which mirror the end-of-process QA/QC checklists to guide staff through the process and ensure that they understand the standards to which each application will be held. Our staff will conduct comprehensive reviews of file documentation as well.

AREA 2: Managing Successful IIJA Grant Applications

We proactively communicate with all stakeholders to 1) avoid issues that may result in questioned costs or audit concerns and 2) resolve any identified problems as quickly as possible. For each political subdivision, we will assist with establishing and maintaining compliant project and financial records and processes by using Franklin's cloud-based Airtable database to track obligations and expenditures for each IIJA/BIL-funded project. Our database will collect all information required for Quarterly Project and Expenditure Reports and ensures compliance with federal and state requirements. We will maintain electronic documentation to ensure eligibility,

compliance, and benchmark conformance. Other cost control services include preparing and submitting all required reports, monitoring changing IIJA/BIL compliance guidance, implementing fraud prevention and abuse practices, submitting and reviewing all program invoices, and preparing and submitting close-out documents.

The Franklin team assists with establishing and maintaining compliant financial records and recordkeeping requirements that comply with federal, state, and local regulations. Our recordkeeping methods consistently receive high marks from state and federal monitors. We focus on providing best-practice financial documentation strategies so that the jurisdictions are always audit-ready and ensure eligibility and benchmark conformance. Other cost control services include preparing and submitting all required reports, monitoring IIJA/BIL program compliance, implementing fraud prevention and abuse practices, and submitting and reviewing financial and contractual documents.

The Franklin Team will maintain reports on the following, at minimum:

- Program application reporting based on status, including aging and production reports
- Disbursement reporting, including statuses, aging and reconciliations
- Actual Federal Funds request process with process flow and communications
- Draw request reports and closing data
- Types of draw requests with descriptors, activity codes and identifiers
- Summary Reporting followed by a list of pertinent acronyms associated with the federal funds management process



AREA 3: Project Management

This is a critical area of support as we will work with LITACorp to ensure this entire program runs smoothly and as many projects as possible are funded and all staff supporting the work across Areas 1, 2 and 4 are coordinated and effectively supporting political subdivisions. We will work with LITACorp to prepare and respond to all applicant and constituent questions and inquiries. We will provide a broad view of all projects and ensure that regional and local priorities are being met while providing insights and recommendations for better ways to allocate and distribute funding and more efficiently manage all projects. In addition, we will ensure there is a cohesive plan for identifying the appropriate use of CDBG dollars as match. We will provide management reports so LITACorp can make data driven decisions and report to stakeholders and we will meet regularly with LITACorp to ensure the smooth management of all projects.

AREA 4: Professional Technical Support

The Franklin Team is not submitting a proposal for this area.

Attachments

Attachment 1: Optional Marketing Materials

Putting
People
First



Key Issues

- **CV-19 Environment Delivery**
- **Homeless Populations**
- **Rehousing Coordination**

Completed: 2021

COVID NCS SHELTERING

South Louisiana

Franklin Associates, LLC, as the Program Manager of Disaster Recovery Housing Programs for the Louisiana Housing Corporation, was tasked with staffing and managing seven non-congregate shelters for highly vulnerable homeless populations during the COVID-19 pandemic. This project required swift staffing deployments and creation of processes in a high pressure environment, as well as 24/7 service provision in multiple sites in manners consistent with CDC guidelines to protect the residents and staff.

The Franklin team continued to operate one remaining shelter of the seven total as efforts to rehouse the shelter residents continued, through spring of 2021. More than 700 residents occupied the seven sites across Baton Rouge and New Orleans during this project.

In this role, our personnel worked closely with LHC and local non-profit partners to coordinate onsite service provision, maintain the safety of the residents, and implement long-term housing plans. Housing specialists, resident advisors and case management personnel, as well as safety and medical services, were coordinated by the Franklin team.



Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Putting
People
First



Buyout and Resettlement Programs

Louisiana

Franklin Associates, LLC, was tasked to provide both program management and case management services as the State of Louisiana developed and implemented its first statewide buyout program and its first resettlement programs.

Franklin's team provided strategic process and policy development services from inception to completion on these projects, including setup of systems of record, creating and finalizing policies, and developing protocols for project implementation. As the projects moved into implementation, the Franklin team provided direct case management services to successfully drive the statewide Restore Solution 4 Buyout and Housing Assistance program, including two community-specific programs, as well as the Isle de Jean Charles Resettlement Program. Two new communities are currently in final buildout phases in New Roads and Schriever in connection with these projects, serving as a national resilience model.

Key Issues

- **CDBG Funded Programs**
- **Disaster Recovery**
- **Disaster Resilience**
- **Policy Development**
- **Training**
- **Case Management**
- **New Community CM**



In Progress: 2022

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Attachment 2: Contract Edits

Franklin accepts all contract terms and conditions as outlined in Attachment VI: Sample Generic Contract except for the following potential proposed changes to the sample generic contract for LITACorp consideration upon contract award.


10.2. TERMINATION OF THIS CONTRACT FOR CONVENIENCE

Generic Contract Language: LITACorp may terminate this Contract for convenience at any time (1) by giving thirty (30) days written notice to the Contractor of such termination; or (2) by negotiating with the Contractor an effective date. LITACorp shall pay the Contractor for, if applicable: (a) deliverables in progress; (b) the percentage that has been completed satisfactorily; and, (c) for transaction-based services up to the date of termination, to the extent work has been performed satisfactorily.

Proposed Contract Language: Propose removal of entirety of 10.2. Termination of this Contract for Convenience as this nullifies the contractual relationship. Termination for cause or for lack of funding are appropriate should those situations occur, but convenience termination creates undue stress on organizations in place to serve the client.

Appendices

Appendix 1: MBE Certification



THIS CERTIFIES THAT


Franklin Associates, LLC
dba N/A


NMSDC
National Minority Supplier
Development Council

* Nationally certified by the: **SOUTHERN REGION MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 541820

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

<p>06/27/2022</p> <hr/> <p>Issued Date</p>	<p>SR01130</p> <hr/> <p>Certificate Number</p>
<p>06/23/2023</p> <hr/> <p>Expiration Date</p>	<p style="text-align: center;"> Ying McGuire NMSDC CEO and President</p> <hr/> <p style="text-align: center;"> Alvin-o Williams Interim President/CEO</p>

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

Certify, Develop, Connect, Advocate.

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Appendix 2: Audited Financial Statements

2021

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

FINANCIAL REPORT

(Compiled)

December 31, 2021

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

FAULK & WINKLER
CPAs - BUSINESS ADVISORS

To the Member
Franklin Associates, LLC
Baton Rouge, Louisiana

Management is responsible for the accompanying financial statements of **FRANKLIN ASSOCIATES, LLC** (a single member limited liability company) (Company), which comprise the balance sheets as of December 31, 2021 and 2020, and the related statements of operations and changes in member's equity, and cash flows for the years then ended, and the related notes to the financial statements in accordance with accounting principles generally accepted in the United States of America. We have performed the compilation engagement in accordance with Statements for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

The supplementary information contained in Schedule 1 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.


Certified Public Accountants

Baton Rouge, Louisiana
August 19, 2022

Exhibit A
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

BALANCE SHEETS

December 31, 2021 and 2020

(See Independent Accountants' Compilation Report)

	ASSETS	
	<u>2021</u>	<u>2020</u>
CURRENT		
Cash	\$ 3,235,598	\$ 3,029,423
Accounts receivable	6,875,490	14,633,473
Prepaid expenses and other	<u>37,590</u>	<u>84,651</u>
Total current assets	10,148,678	17,747,547
PROPERTY AND EQUIPMENT, net	<u>398,462</u>	<u>131,214</u>
Total assets	<u>\$ 10,547,140</u>	<u>\$ 17,878,761</u>
LIABILITIES AND MEMBER'S EQUITY		
CURRENT LIABILITIES		
Accounts payable	\$ 1,665,248	\$ 5,780,259
Accrued expenses	<u>86,736</u>	<u>133,593</u>
Total current liabilities	1,751,984	5,913,852
NOTE PAYABLE	<u>-</u>	<u>253,200</u>
Total liabilities	1,751,984	6,167,052
MEMBER'S EQUITY	<u>8,795,156</u>	<u>11,711,709</u>
Total liabilities and member's equity	<u>\$ 10,547,140</u>	<u>\$ 17,878,761</u>

The accompanying notes to financial statements are
 an integral part of this statement.

2

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit B
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

**STATEMENTS OF OPERATIONS
 AND CHANGES IN MEMBER'S EQUITY**

For the years ended December 31, 2021 and 2020

(See Independent Accountants' Compilation Report)

	<u>2021</u>	<u>2020</u>
REVENUE		
Fees	\$ 8,549,498	\$ 30,759,564
Rental	57,345	-
Total revenue	8,606,843	30,759,564
OPERATING EXPENSES	<u>5,254,835</u>	<u>19,318,399</u>
Operating income	3,352,008	11,441,165
OTHER INCOME (EXPENSE)		
Paycheck Protection Program loan forgiveness	253,200	-
Other income	6,233	3,574
Interest	<u>(505)</u>	<u>(11,572)</u>
Total other income (expense)	<u>258,928</u>	<u>(7,998)</u>
Net income	3,610,936	11,433,167
MEMBER'S EQUITY		
Beginning of year	11,711,709	1,238,756
Distributions to member	<u>(6,527,489)</u>	<u>(960,214)</u>
End of year	<u>\$ 8,795,156</u>	<u>\$ 11,711,709</u>

The accompanying notes to financial statements are
 an integral part of this statement.

3

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit C
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

STATEMENTS OF CASH FLOWS

For the years ended December 31, 2021 and 2020

(See Independent Accountants' Compilation Report)

	<u>2021</u>	<u>2020</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Net income	\$ 3,610,936	\$ 11,433,167
Adjustments for non-cash items:		
Depreciation	72,386	34,315
Forgiveness of Paycheck Protection Program Loan	(253,200)	-
Change in operating assets and liabilities:		
Accounts receivable, prepaid expenses, and other assets	7,805,044	(13,899,447)
Accounts payable and accrued expenses	<u>(4,161,868)</u>	<u>5,700,160</u>
Net cash provided by operating activities	<u>7,073,298</u>	<u>3,268,195</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Acquisitions of property and equipment	<u>(339,634)</u>	<u>(88,763)</u>
CASH FLOWS FROM FINANCING ACTIVITIES		
Proceeds from Payroll Protection Program Loan	-	253,200
Proceeds from line of credit	-	700,000
Principal payments on line of credit	-	(700,000)
Distributions to member	<u>(6,527,489)</u>	<u>(960,214)</u>
Net cash used by financing activities	<u>(6,527,489)</u>	<u>(707,014)</u>
Net increase in cash	206,175	2,472,418
CASH		
Beginning of year	<u>3,029,423</u>	<u>557,005</u>
End of year	<u>\$ 3,235,598</u>	<u>\$ 3,029,423</u>
Supplemental disclosure of cash flow information:		
Interest paid	<u>\$ 505</u>	<u>\$ 11,572</u>

 The accompanying notes to financial statements are
 an integral part of this statement.

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit D

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

NOTES TO FINANCIAL STATEMENTS

(See Independent Accountants' Compilation Report)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization and operations

Franklin Associates, LLC (a single member limited liability company) (the Company) is a management consulting firm specializing in communications, project management, urban planning, and disaster recovery services.

The Company is located in Baton Rouge, Louisiana and derives the majority of its revenue from clients in Louisiana.

Financial statement presentation

The financial statements of the Company are prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America.

Estimates

Management uses estimates and assumptions in preparing the financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Significant estimates used in preparing these financial statements include depreciation of property and an allowance for uncollectable accounts receivable.

Cash and cash equivalents

For the purpose of the statement of cash flows, the Company considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents. At times throughout the year the Company may maintain bank balances in excess of the FDIC insured limits. Management believes the risk is limited. The Company had balances in excess of insured limits of \$2,985,598 and \$2,779,423 as of December 31, 2021 and 2020.

(Continued)

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Accounts receivable and revenue recognition

Accounts receivable are recorded at cost, net of an allowance for uncollectable accounts. Generally, the Company does not require collateral with the extension of credit.

A general allowance for uncollectable accounts receivable is based on management's estimate of the collectability of accounts receivable. There was no allowance for uncollectable accounts recorded as of December 31, 2021 and 2020. Retainage receivable was \$4,037 and \$2,560 at December 31, 2021 and 2020, respectively, and is included in accounts receivable on the balance sheets.

Accounts receivable balances, net of allowance for uncollectable accounts, as of January 1, 2021 and 2020 were \$14,633,473 and \$800,672, respectively.

The Company's revenues are derived from project management and consulting services which are outlined in individual contracts with customers. Contracts for each customer are unique and provide a description of each service and/or deliverable the Company is to provide. As the Company provides services, costs associated with the project are accumulated and are used to determine what deliverables have been met and the amount of revenue to recognize. As the Company performs the services of the contract, the Company bills the customer according to contract terms and as a result, revenue is recognized over time. Contract amounts are agreed upon in advance and are typically for a fixed amount.

The Company earns revenue from the rental of event center space to outside parties. The Company has determined that the transaction prices related to contracts entered through exchange transactions are primarily attributable to one performance obligation (event center space rentals). The Company recognizes revenue when the performance obligation is satisfied (event center space is utilized). The event center can be rented out for different purposes as well as variable terms, all of which are short term in nature. The Company leases the event center from a related party as discussed in Note 3.

Payments from customers is based on terms agreed upon in the contract, generally it is within 30 days, however, most customers are governmental agencies or organizations who use federal, state, or local funding sources to pay for the Company's services. As a result, some payment terms may be delayed due to the nature and timing of federal funding.

The Company offers no warranties or related obligations for their services.

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Property and equipment

Property and equipment are stated at cost less accumulated depreciation which is computed under the straight-line method over the estimated useful lives of the assets. The Company has a policy of capitalizing property and equipment acquisitions in excess of \$1,000. Expenses for repairs and maintenance are charged to operations as incurred. Upon disposal, the cost and related accumulated depreciation are removed from the accounts and gain or loss, if any, is reflected in the statement of operations.

Advertising

The Company expensed advertising costs of \$44,238 and \$36,668 as incurred in 2021 and 2020, respectively.

Income taxes

The Company is a disregarded entity under the provisions of the Internal Revenue Code. Accordingly, no provision or liability for federal or state income taxes is reflected in the accompanying financial statements. Instead, the member is liable for individual federal and state income taxes on the Company's taxable income. The Company's open tax periods are 2018 through 2021.

Concentration of credit risk

The Company's revenues are derived primarily from clients located in Louisiana. Financial instruments that potentially subject the Company to concentration of credit risk consist of cash and trade, receivables. The Company generally does not require collateral from customers. The Company typically maintains its cash balances in local banks that may, at times, exceed FDIC limits. Management believes this risk is limited.

Accrued vacation

Vacation leave is earned at varying rates for two to four weeks per year depending on length of service. A maximum of five days of unused vacation leave can be carried over at December 31 at the discretion of management. Additionally, unused vacation is paid at termination. At December 31, 2021 and 2020, amounts related to unused, earned vacation leave are reflected in accrued expenses in the amount of \$13,474 and \$13,072, respectively.

Subsequent events

In preparing these financial statements, the Company has evaluated events and transactions for potential recognition or disclosure through August 19, 2022, which was the date the financial statements were available to be issued.

Exhibit D
(Continued)

NOTE 2 - PROPERTY AND EQUIPMENT

Property and equipment, related service lives and accumulated depreciation at December 31, 2021 and 2020 are as follows:

<u>Description</u>	<u>Estimated Service Lives</u>	<u>2021</u>	<u>2020</u>
Furniture and fixtures	7 years	\$ 420,444	\$ 102,132
Vehicles	5 years	127,961	127,961
Computer equipment	5 years	55,630	39,448
Computer software	3 years	16,168	16,168
IT Equipment	5years	14,605	14,605
Telephone system	7 years	6,572	6,572
Leasehold improvements	10 years	5,139	-
Equipment	5 years	2,881	2,881
		649,400	309,767
Less accumulated depreciation		(250,938)	(178,553)
Total property and equipment, net		<u>\$ 398,462</u>	<u>\$ 131,214</u>

Depreciation expense during 2021 and 2020 was \$72,386 and \$34,315, respectively.

NOTE 3 - RELATED PARTY TRANSACTIONS

The Laude Group, LLC

The Laude Group, LLC provides office facilities and has common ownership. Rent charged to the Company was \$10,000 and \$32,500 during 2021 and 2020, respectively. The lease matured on June 30, 2020 and was then converted into a month to month lease upon expiration. The Company leased this building for the first four months of 2021.

250 SF, LLC

250 SF, LLC provides office facilities to the Company and has common ownership. The lease was signed in May 2021 and will mature after a primary term of 12 years. The monthly rent for the facility lease is set at \$15,500. 250 SF, LLC also provides the Company with an event center facility. The event center lease was signed in May of 2021 for a 12 year lease with monthly rent of \$10,000. Rent charged to the Company was \$204,000 in 2021.

Exhibit D
(Continued)

NOTE 4 - LINE OF CREDIT

The Company has a \$700,000 line of credit with its financial institution that matures in August 5, 2023. Interest is due monthly and is computed at the Wall Street Journal Prime Rate plus 0.75 percentage points (effective rate of 4.00% as of December 31, 2021). The line of credit is secured by the assets of the Company and is guaranteed by the member. The line of credit was unused during the years ended December 31, 2021 and 2020.

NOTE 5 - NOTE PAYABLE

During 2020, the Company received loan proceeds in the amount of approximately \$253,200 under the Paycheck Protection Program (PPP). The PPP, established as part of the CARES Act, provides for loans to qualifying organizations for amounts up to 2.5 times of the average monthly payroll expenses of the qualifying organization. The loans and accrued interest may be forgivable as long as the borrower uses the loan proceeds for eligible purposes, including payroll, certain employee benefits, rent and utilities, and maintains certain payroll levels. The amount of loan forgiveness may be reduced if the borrower terminates employees or reduces salaries during the 24-week period. See Note 9 for further information regarding loan forgiveness.

On April 6, 2021, the Company's PPP loan was forgiven in full as result of the Company meeting the required criteria for loan forgiveness as described above. The full amount of forgiveness will be recognized during the 2021 fiscal year. PPP Loans are subject to audit for six years from the date of forgiveness. Department of Treasury guidance states that loans over \$2 million will be fully audited and loans under \$2 million are subject to random audits. If audited, the U.S. Small Business Administration could redetermine the amount of forgiveness.

NOTE 6 - RETIREMENT PLAN

The Company offers retirement benefits through simple individual retirement accounts for eligible employees electing to establish an account. The plan includes a provision under which the eligible employees may defer a maximum of \$13,000 of their annual compensation, pursuant to Section 408(p) of the Internal Revenue Code. The Company provides matching contributions of 3% of eligible compensation. Participants are fully vested in contributions made to their individual retirement account. The Company contributed \$22,098 and \$21,176 in 2021 and 2020, respectively.

NOTE 7 - DISTRIBUTIONS

The member may elect to make distributions to pay income taxes and for other purposes. Although the amounts of future distributions have not been determined, the distributions could be material to the financial statements. During 2021 and 2020, member distributions were \$6,527,489 and \$960,214 respectively.

Exhibit D
(Continued)

NOTE 8 - CONCENTRATIONS

At December 31, 2021, approximately 75% of the Company's accounts receivable was from one customer. Additionally, 57% of revenue was derived from one customer for the year ended 2021.

At December 31, 2020, approximately 94% of the Company's accounts receivable was from one customer. Additionally, 90% of revenue was derived from one customer for the year ended 2020.

Schedule 1
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

SCHEDULES OF OPERATING EXPENSES

For the years ended December 31, 2021 and 2020

(See Independent Accountants' Compilation Report)

	<u>2021</u>	<u>2020</u>
Salaries	\$ 2,635,272	\$ 5,975,737
Subcontracted services	1,332,139	11,462,520
Occupancy	295,536	50,287
Materials and supplies	246,922	77,954
Payroll taxes	213,581	501,316
Employee benefits	95,990	109,404
Professional services	95,220	146,507
Depreciation	72,386	34,315
Insurance	75,682	35,026
Advertising	44,238	36,668
Telephone and internet	42,027	15,327
Dues, subscriptions, and publications	38,232	28,516
Employee relations	22,887	18,288
Mileage	16,157	250,664
Automobile	4,480	5,599
Meals	1,741	547,277
Bad debt	-	10,807
Travel and lodging	9,986	5,924
Other	12,359	6,263
Total operating expenses	<u>\$ 5,254,835</u>	<u>\$ 19,318,399</u>

2020

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

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December 31, 2020

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

**INDEPENDENT ACCOUNTANTS' COMPILATION REPORT**

To the Member
Franklin Associates, LLC
Baton Rouge, Louisiana

Management is responsible for the accompanying financial statements of **FRANKLIN ASSOCIATES, LLC** (a single member limited liability company) (Company), which comprise the balance sheets as of December 31, 2020 and 2019, and the related statements of operations and changes in member's equity, and cash flows for the years then ended, and the related notes to the financial statements in accordance with accounting principles generally accepted in the United States of America. We have performed the compilation engagement in accordance with Statements for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

The supplementary information contained in Schedule 1 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.



Certified Public Accountants

Baton Rouge, Louisiana
December 23, 2021

Exhibit A
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

BALANCE SHEETS

December 31, 2020 and 2019

(See Independent Accountants' Compilation Report)

	ASSETS	
	<u>2020</u>	<u>2019</u>
CURRENT		
Cash	\$ 3,029,423	\$ 557,005
Accounts receivable	14,633,473	800,672
Prepaid expenses and other	<u>84,651</u>	<u>18,005</u>
Total current assets	17,747,547	1,375,682
PROPERTY AND EQUIPMENT, net	<u>131,214</u>	<u>76,766</u>
Total assets	<u>\$ 17,878,761</u>	<u>\$ 1,452,448</u>
LIABILITIES AND MEMBER'S EQUITY		
CURRENT LIABILITIES		
Accounts payable	\$ 5,780,259	\$ 117,664
Accrued expenses	<u>133,593</u>	<u>96,028</u>
Total current liabilities	5,913,852	213,692
NOTE PAYABLE	<u>253,200</u>	<u>-</u>
Total liabilities	6,167,052	213,692
MEMBER'S EQUITY	<u>11,711,709</u>	<u>1,238,756</u>
Total liabilities and member's equity	<u>\$ 17,878,761</u>	<u>\$ 1,452,448</u>

The accompanying notes to financial statements are
 an integral part of this statement.

2

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit B
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

**STATEMENTS OF OPERATIONS
 AND CHANGES IN MEMBER'S EQUITY**

For the years ended December 31, 2020 and 2019

(See Independent Accountants' Compilation Report)

	<u>2020</u>	<u>2019</u>
REVENUE		
Fees	\$ 30,759,564	\$ 3,692,899
OPERATING EXPENSES	<u>19,318,399</u>	<u>2,378,039</u>
Operating income	11,441,165	1,314,860
OTHER INCOME (EXPENSE)		
Other income	3,574	87,810
Interest	<u>(11,572)</u>	<u>(787)</u>
Net income	11,433,167	1,401,883
MEMBER'S EQUITY		
Beginning of year	1,238,756	790,811
Distributions to member	<u>(960,214)</u>	<u>(953,938)</u>
End of year	<u>\$ 11,711,709</u>	<u>\$ 1,238,756</u>

 The accompanying notes to financial statements are
 an integral part of this statement.

3

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit C
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

STATEMENTS OF CASH FLOWS

For the years ended December 31, 2020 and 2019

(See Independent Accountants' Compilation Report)

	<u>2020</u>	<u>2019</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Net income	\$ 11,433,167	\$ 1,401,883
Adjustments for non-cash items:		
Depreciation	34,315	23,212
Change in operating assets and liabilities:		
Accounts receivable, prepaid expenses, and other assets	(13,899,447)	(17,030)
Accounts payable and accrued expenses	<u>5,700,160</u>	<u>(104,640)</u>
Net cash provided by operating activities	<u>3,268,195</u>	<u>1,303,425</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Acquisitions of property and equipment	<u>(88,763)</u>	<u>(43,423)</u>
CASH FLOWS FROM FINANCING ACTIVITIES		
Proceeds from Payroll Protection Program Loan	253,200	-
Proceeds from line of credit	700,000	-
Principal payments on line of credit	(700,000)	-
Distributions to member	<u>(960,214)</u>	<u>(953,938)</u>
Net cash used by financing activities	<u>(707,014)</u>	<u>(953,938)</u>
Net increase in cash	2,472,418	306,064
CASH		
Beginning of year	<u>557,005</u>	<u>250,941</u>
End of year	<u>\$ 3,029,423</u>	<u>\$ 557,005</u>
Supplemental disclosure of cash flow information:		
Interest paid	<u>\$ 11,572</u>	<u>\$ 787</u>

 The accompanying notes to financial statements are
 an integral part of this statement.

4

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit D

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

NOTES TO FINANCIAL STATEMENTS

(See Independent Accountants' Compilation Report)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization and operations

Franklin Associates, LLC (a single member limited liability company) (the Company) is a management consulting firm specializing in communications, project management, urban planning, and disaster recovery services.

The Company is located in Baton Rouge, Louisiana and derives the majority of its revenue from clients in Louisiana.

Financial statement presentation

The financial statements of the Company are prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America.

Estimates

Management uses estimates and assumptions in preparing the financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Significant estimates used in preparing these financial statements include depreciation of property and an allowance for uncollectable accounts receivable.

Cash and cash equivalents

Cash, for the statement of cash flows, consists of highly liquid investments with original maturities of three months or less. At times throughout the year the Company maintains bank accounts in excess of the FDIC insured limits. Management believes that the risk is limited.

(Continued)

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Accounts receivable and revenue recognition

Accounts receivable are recorded at cost, net of an allowance for uncollectable accounts. Generally, the Company does not require collateral with the extension of credit.

A general allowance for uncollectable accounts receivable is based on management's estimate of the collectability of accounts receivable. There was no allowance for uncollectable accounts recorded as of December 31, 2020 and 2019. Retainage receivable was \$2,560 and \$2,372 at December 31, 2020 and 2019, respectively, and is included in accounts receivable on the balance sheets.

Accounts receivable balances, net of allowance for uncollectable accounts, as of January 1, 2019 and 2020 were \$788,681 and \$800,672, respectively.

The Company's revenues are derived from project management and consulting services which are outlined in individual contracts with customers. Contracts for each customer are unique and provide a description of each service and/or deliverable the Company is to provide. As the Company provides services, costs associated with the project are accumulated and are used to determine what deliverables have been met and the amount of revenue to recognize. As the Company performs the services of the contract, the Company bills the customer according to contract terms and as a result, revenue is recognized over time. Contract amounts are agreed upon in advance and are typically for a fixed amount.

Payments from customers is based on terms agreed upon in the contract, generally it is within 30 days, however, most customers are governmental agencies or organizations who use federal, state, or local funding sources to pay for the Company's services. As a result, some payment terms may be delayed due to the nature and timing of federal funding.

The Company offers no warranties or related obligations for their services.

Property and equipment

Property and equipment are stated at cost less accumulated depreciation which is computed under the straight-line method over the estimated useful lives of the assets. The Company has a policy of capitalizing property and equipment acquisitions in excess of \$1,000. Expenses for repairs and maintenance are charged to operations as incurred. Upon disposal, the cost and related accumulated depreciation are removed from the accounts and gain or loss, if any, is reflected in the statement of operations.

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Advertising

The Company expensed advertising costs of \$36,668 and \$41,986 as incurred in 2020 and 2019, respectively.

Income taxes

The Company is a disregarded entity under the provisions of the Internal Revenue Code. Accordingly, no provision or liability for federal or state income taxes is reflected in the accompanying financial statements. Instead, the member is liable for individual federal and state income taxes on the Company's taxable income. The Company's open tax periods are 2017 through 2020.

Concentration of credit risk

The Company's revenues are derived primarily from clients located in Louisiana. Financial instruments that potentially subject the Company to concentration of credit risk consist of trade cash, receivables and accounts payable. The Company generally does not require collateral from customers. The Company typically maintains its cash balances in local banks that may, at times, exceed FDIC limits. Management believes this risk is limited.

Accrued vacation

Vacation leave is earned at varying rates for two to four weeks per year depending on length of service. A maximum of five days of unused vacation leave can be carried over at December 31 at the discretion of management. Additionally, unused vacation is paid at termination. At December 31, 2020 and 2019, amounts related to unused, earned vacation leave are reflected in accrued expenses in the amount of \$13,072 and \$12,676, respectively.

Adoption of new accounting standards

On January 1, 2020, the Company adopted ASU 2014-09 *Revenue from Contracts with Customers* and all subsequent ASU (collectively "ASC 606") which creates a single framework for recognizing revenue from contracts with customers that fall within its scope. This ASU replaced most revenue recognition guidance in U.S. GAAP and addresses how an entity should recognize revenue derived from various contracts with customers that generate revenue, along with requiring additional disclosures related to the nature, amount, and timing of revenue and cash flows arising from contracts with customers. Primarily, the update requires the Company to evaluate various performance obligations related to its contracts with customers, allocate the transaction price to the various performance obligations, and recognize revenue as performance obligations are satisfied.

7

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Adoption of new accounting standards (continued)

As noted above, the Company's revenue primarily relates to project management and consulting services. The Company has determined that the transaction prices related to the contracts are primarily attributable to individual performance obligations that are satisfied over time. When a customer requests additional services not covered in the original contract, the Company establishes a new contract with the Customer to cover those separate obligations. As a result, the adoption of this standard did not change the Company's methodology for revenue recognition for its current revenue streams. Because of the adoption of ASC 606 does not materially change the way the Company recognizes revenue, there was no restatement required to beginning member's equity as of January 1, 2020.

Subsequent events

In preparing these financial statements, the Company has evaluated events and transactions for potential recognition or disclosure through December 23, 2021, which was the date the financial statements were available to be issued.

NOTE 2 - PROPERTY AND EQUIPMENT

Property and equipment, related service lives and accumulated depreciation at December 31, 2020 and 2019 are as follows:

<u>Description</u>	<u>Estimated Service Lives</u>	<u>2020</u>	<u>2019</u>
Furniture and fixtures	7 years	\$ 102,132	\$ 15,497
Vehicles	5 years	127,961	127,961
Computer equipment	5 years	39,448	39,593
Computer software	3 years	16,168	16,168
IT Equipment	5 years	14,605	14,605
Telephone system	7 years	6,572	6,572
Equipment	5 years	<u>2,881</u>	<u>608</u>
		309,767	221,004
Less accumulated depreciation		<u>(178,553)</u>	<u>(144,238)</u>
Total property and equipment, net		<u>\$ 131,214</u>	<u>\$ 76,766</u>

Depreciation expense during 2020 and 2019 was \$34,315 and \$23,212, respectively.

Exhibit D
(Continued)

NOTE 3 - RELATED PARTY TRANSACTIONS**The Laude Group, LLC**

The Laude Group, LLC provides office facilities and has common ownership. Rent charged to the Company was \$32,500 and \$30,000 during 2020 and 2019, respectively.

The lease matured on June 30, 2020 and was then converted into a month to month lease upon expiration.

NOTE 4 - LINE OF CREDIT

The Company has a \$700,000 line of credit with its financial institution that matures in August 5, 2023. Interest is due monthly and is computed at the Wall Street Journal Prime Rate plus 0.75 percentage points (effective rate of 4.00% as of December 31, 2020). The line of credit is secured by the assets of the Company and is guaranteed by the member. No amounts were owed on the line of credit at December 31, 2020 and was unused during 2019.

NOTE 5 - NOTE PAYABLE

During 2020, the Company received loan proceeds in the amount of approximately \$253,200 under the Paycheck Protection Program (PPP). The PPP, established as part of the CARES Act, provides for loans to qualifying organizations for amounts up to 2.5 times of the average monthly payroll expenses of the qualifying organization. The loans and accrued interest may be forgivable as long as the borrower uses the loan proceeds for eligible purposes, including payroll, certain employee benefits, rent and utilities, and maintains certain payroll levels. The amount of loan forgiveness may be reduced if the borrower terminates employees or reduces salaries during the 24-week period. See Note 9 for further information regarding loan forgiveness.

NOTE 6 - RETIREMENT PLAN

The Company offers retirement benefits through simple individual retirement accounts for eligible employees electing to establish an account. The plan includes a provision under which the eligible employees may defer a maximum of \$13,000 of their annual compensation, pursuant to Section 408(p) of the Internal Revenue Code. The Company provides matching contributions of 3% of eligible compensation. Participants are fully vested in contributions made to their individual retirement account. The Company contributed \$21,176 and \$15,955 in 2020 and 2019, respectively.

NOTE 7 - DISTRIBUTIONS

The member may elect to make distributions to pay income taxes and for other purposes. Although the amounts of future distributions have not been determined, the distributions could be material to the financial statements. During 2020 and 2019, member distributions were \$960,214 and \$953,938 respectively.

Exhibit D
(Continued)

NOTE 8 - CONCENTRATIONS

At December 31, 2020, approximately 94% of the Company's accounts receivable was from one customer. Additionally, 90% of revenue was derived from one customer for the year ended 2020.

At December 31, 2019, approximately 58% of the Company's accounts receivable were from four customers. Additionally, 59% of revenue was derived from four customers for the year ended 2019.

NOTE 9 - SUBSEQUENT EVENT

On March 23, 2021, the Company's PPP loan was forgiven in full as result of the Company meeting the required criteria for loan forgiveness as previously described in Note 5. The full amount of forgiveness will be recognized during the 2021 fiscal year. PPP Loans are subject to audit for six years from the date of forgiveness. Department of Treasury guidance states that loans over \$2 million will be fully audited and loans under \$2 million are subject to random audits. If audited, the U.S. Small Business Administration could redetermine the amount of forgiveness.

Schedule 1
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

SCHEDULES OF OPERATING EXPENSES

For the years ended December 31, 2020 and 2019

(See Independent Accountants' Compilation Report)

	<u>2020</u>	<u>2019</u>
Subcontracted services	\$ 10,950,459	\$ 607,219
Salaries	5,975,737	1,300,336
Meals	547,277	790
Travel and lodging	517,985	9,142
Payroll taxes	501,316	98,268
Mileage	250,664	2,530
Professional services	146,507	49,052
Employee benefits	109,404	91,743
Materials and supplies	77,954	30,372
Occupancy	50,287	41,233
Advertising	36,668	41,986
Insurance	35,026	29,137
Depreciation	34,315	23,212
Dues, subscriptions, and publications	28,516	8,925
Employee relations	18,288	15,857
Telephone and internet	15,327	10,422
Bad debt	10,807	-
Automobile	5,599	9,601
Other	6,263	8,214
Total operating expenses	<u>\$ 19,318,399</u>	<u>\$ 2,378,039</u>

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

FINANCIAL REPORT

(Compiled)

December 31, 2020

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

2019

FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

FINANCIAL REPORT

(Compiled)

December 31, 2019

FAULK & WINKLER
CPAs - BUSINESS ADVISORS

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

FRANKLIN ASSOCIATES, LLC
Baton Rouge, Louisiana**TABLE OF CONTENTS**

December 31, 2019

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

**INDEPENDENT ACCOUNTANTS' COMPILATION REPORT**

To the Member
Franklin Associates, LLC
Baton Rouge, Louisiana

Management is responsible for the accompanying financial statements of **FRANKLIN ASSOCIATES, LLC** (a Louisiana limited liability company) (Company), which comprise the balance sheets as of December 31, 2019 and 2018, and the related statements of operations and changes in member's equity, and cash flows for the years then ended, and the related notes to the financial statements in accordance with accounting principles generally accepted in the United States of America. We have performed the compilation engagement in accordance with Statements for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

The supplementary information contained in Schedule 1 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.



Certified Public Accountants

Baton Rouge, Louisiana
October 6, 2020

Exhibit A
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

BALANCE SHEETS

December 31, 2019 and 2018

(See Independent Accountants' Compilation Report)

	ASSETS	
	<u>2019</u>	<u>2018</u>
CURRENT		
Cash	\$ 557,005	\$ 250,941
Accounts receivable, net	800,672	788,681
Prepaid expenses and other	<u>18,005</u>	<u>12,966</u>
Total current assets	1,375,682	1,052,588
PROPERTY AND EQUIPMENT, net	<u>76,766</u>	<u>56,555</u>
Total assets	<u>\$ 1,452,448</u>	<u>\$ 1,109,143</u>
LIABILITIES AND MEMBER'S EQUITY		
CURRENT LIABILITIES		
Accounts payable and accrued expenses	\$ 213,692	\$ 318,332
MEMBER'S EQUITY	<u>1,238,756</u>	<u>790,811</u>
Total liabilities and member's equity	<u>\$ 1,452,448</u>	<u>\$ 1,109,143</u>

The accompanying notes to financial statements are
 an integral part of this statement.

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit B
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

**STATEMENTS OF OPERATIONS
 AND CHANGES IN MEMBER'S EQUITY**

For the years ended December 31, 2019 and 2018

(See Independent Accountants' Compilation Report)

	<u>2019</u>	<u>2018</u>
REVENUE		
Fees	\$ 3,692,899	\$ 2,748,720
OPERATING EXPENSES	<u>2,378,826</u>	<u>2,468,953</u>
Income from operations	1,314,073	279,767
OTHER		
Other income	<u>87,810</u>	<u>1,323</u>
Net income	1,401,883	281,090
MEMBER'S EQUITY		
Beginning of year	790,811	880,131
Distributions to member	<u>(953,938)</u>	<u>(370,410)</u>
End of year	<u>\$ 1,238,756</u>	<u>\$ 790,811</u>

The accompanying notes to financial statements are
 an integral part of this statement.

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit C
FRANKLIN ASSOCIATES, LLC
 Baton Rouge, Louisiana

STATEMENTS OF CASH FLOWS

For the years ended December 31, 2019 and 2018

(See Independent Accountants' Compilation Report)

	<u>2019</u>	<u>2018</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Net income	\$ 1,401,883	\$ 281,090
Adjustments for non-cash items:		
Depreciation	23,212	22,230
Change in operating assets and liabilities:		
Accounts receivable, prepaid expenses, and other assets	(17,030)	1,143,435
Accounts payable and accrued expenses	<u>(104,640)</u>	<u>(1,141,082)</u>
Net cash provided by operating activities	<u>1,303,425</u>	<u>305,673</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Acquisitions of property and equipment	<u>(43,423)</u>	<u>(7,880)</u>
CASH FLOWS FROM FINANCING ACTIVITIES		
Distributions to member	<u>(953,938)</u>	<u>(370,410)</u>
Net increase (decrease) in cash	306,064	(72,617)
CASH		
Beginning of year	<u>250,941</u>	<u>323,558</u>
End of year	<u>\$ 557,005</u>	<u>\$ 250,941</u>
Supplemental disclosure of cash flow information:		
Interest paid	<u>\$ 787</u>	<u>\$ 168</u>

 The accompanying notes to financial statements are
 an integral part of this statement.

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Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Exhibit D**FRANKLIN ASSOCIATES, LLC**
Baton Rouge, Louisiana**NOTES TO FINANCIAL STATEMENTS**

(See Independent Accountants' Compilation Report)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**Organization and operations**

Franklin Associates, LLC (the Company) is a management consulting firm specializing in communications, project management, urban planning, and disaster recovery services.

The Company is located in Baton Rouge, Louisiana and derives the majority of its revenue from clients in Louisiana.

Method of accounting

Assets, liabilities, revenues and expenses are recognized on the accrual method of accounting.

Estimates

Management uses estimates and assumptions in preparing the financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Significant estimates used in preparing these financial statements include depreciation of property and an allowance for uncollectable accounts receivable.

Cash and cash equivalents

Cash, for the statement of cash flows, consists of highly liquid investments with original maturities of three months or less. At times throughout the year the Company maintains bank accounts in excess of the FDIC insured limits. Management believes that the risk is limited.

(Continued)

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Accounts receivable and revenue recognition

Accounts receivable are recorded at cost, net of an allowance for uncollectable accounts. Generally, the Company does not require collateral with the extension of credit. The Company ages its accounts receivable using the corresponding date services are performed and considers accounts past due based on terms agreed upon in the transaction, which is generally 30 days. Retainage receivable was \$2,372 and \$2,372 at December 31, 2019 and 2018, respectively.

A general allowance for uncollectable accounts receivable is based on management's estimate of the collectability of accounts receivable. At December 31, 2018, management has recorded an allowance for doubtful accounts of \$69,567. There was no allowance for uncollectable accounts recorded as of December 31, 2019.

Revenues are recognized as services are performed. Costs associated with the revenues are recognized when the related revenues are recognized.

Property and equipment

Property and equipment are stated at cost less accumulated depreciation which is computed under the straight-line method over the estimated useful lives of the assets. The Company has a policy of capitalizing property and equipment acquisitions in excess of \$1,000. Expenses for repairs and maintenance are charged to operations as incurred. Upon disposal, the cost and related accumulated depreciation are removed from the accounts and gain or loss, if any, is reflected in the statement of operations.

Income taxes

The Company is taxed as a pass through entity under the provisions of the Internal Revenue Code. Accordingly, no provision or liability for federal or state income taxes is reflected in the accompanying financial statements. Instead, the member is liable for individual federal and state income taxes on the Company's taxable income. The Company prepares its income tax return using the cash basis of accounting. The Company's open tax periods are 2016 through 2019.

Advertising

The Company expensed advertising costs of \$1,061 and \$181 as incurred in 2019 and 2018, respectively.

Exhibit D
(Continued)

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Concentration of credit risk

The Company's revenues are derived primarily from clients located in Louisiana. Financial instruments that potentially subject the Company to concentration of credit risk consist primarily of trade receivables. The Company generally does not require collateral from customers.

Accrued vacation

Vacation leave is earned at varying rates for two to four weeks per year depending on length of service. A maximum of five days of unused vacation leave can be carried over at December 31 at the discretion of management. Additionally, unused vacation is paid at termination. Accordingly, amounts related to unused, earned vacation leave have been accrued.

Subsequent events

In preparing these financial statements, the Company has evaluated events and transactions for potential recognition or disclosure through September 7, 2020, which was the date the financial statements were available to be issued.

NOTE 2 - PROPERTY AND EQUIPMENT

Property and equipment, related service lives and accumulated depreciation at December 31, 2019 and 2018 are as follows:

<u>Description</u>	<u>Estimated Service Lives</u>	<u>2019</u>	<u>2018</u>
Vehicles	5 years	\$ 127,961	\$ 98,735
Computer equipment	5 years	39,593	40,609
Computer software	3 years	16,168	16,168
Furniture and fixtures	7 years	15,497	15,497
IT Equipment	5 years	14,605	14,605
Telephone system	7 years	6,572	6,572
Equipment	5 years	<u>608</u>	<u>608</u>
		221,004	177,581
Less accumulated depreciation		<u>(144,238)</u>	<u>(121,026)</u>
		<u>\$ 76,766</u>	<u>\$ 56,555</u>

Depreciation expense during 2019 and 2018 was \$23,212 and \$22,230, respectively.

Exhibit D
(Continued)

NOTE 3 - RELATED PARTY**The Laude Group, LLC**

The Laude Group, LLC provides office facilities and has common ownership. Rent charged to the Company was \$30,000 and \$24,000 during 2019 and 2018, respectively.

The lease matured in June 30, 2020 and was then converted into a month to month lease upon expiration.

NOTE 4 - LINE OF CREDIT

The Company has a \$700,000 line of credit with its financial institution that matures in August 2021. Interest is due monthly and is computed at the Wall Street Journal Money Rate plus 0.75 percentage points (5.50% as of December 31, 2019). The line of credit is secured by the assets of the Company and is guaranteed by the stockholder. The line of credit was unused at December 31, 2019 and 2018.

NOTE 5 - RETIREMENT PLAN

The Company offers retirement benefits through simple individual retirement accounts for eligible employees electing to establish an account. The plan includes a provision under which the eligible employees may defer a maximum of \$13,000 of their annual compensation, pursuant to Section 408(p) of the Internal Revenue Code. The Company provides matching contributions of 3% of eligible compensation. Participants are fully vested in contributions made to their individual retirement account. The Company contributed \$15,955 and \$11,524 in 2019 and 2018, respectively.

NOTE 6 - DISTRIBUTIONS

The member may elect to make distributions to pay income taxes and for other purposes. Although the amounts of future distributions have not been determined, the distributions could be material to the financial statements. During 2019 and 2018, member distributions were \$953,938 and \$370,410 respectively.

NOTE 5 - RISKS AND UNCERTAINTIES

The COVID-19 outbreak in the United States has caused business disruption through mandated closings, reduction of operating hours, or operational restrictions for nonessential businesses, including retail stores, restaurants, personal service businesses and all entertainment venues. While the disruption is currently expected to be temporary, there is considerable uncertainty around the duration of the closings. Therefore, the Company expects this matter to negatively impact availability of resources and its operating results. However, the related financial impact and duration cannot be reasonably estimated at this time.

Schedule 1
FRANKLIN ASSOCIATES, LLC

Baton Rouge, Louisiana

SCHEDULES OF OPERATING EXPENSES

For the years ended December 31, 2019 and 2018

(See Independent Accountants' Compilation Report)

	<u>2019</u>	<u>2018</u>
Salaries	\$ 1,300,336	\$ 854,710
Employee benefits	91,743	61,904
Payroll taxes	98,268	67,255
Subcontracted services	607,219	1,162,910
Professional services	49,052	35,491
Business promotion	41,986	38,794
Occupancy	41,233	133,362
Materials and supplies	30,372	23,884
Insurance	29,137	24,188
Depreciation	23,212	22,230
Employee relations	15,857	14,608
Travel and entertainment	12,462	302
Telephone and internet	10,422	9,858
Automobile	9,601	6,540
Dues, subscriptions, and publications	8,925	5,404
Other	<u>9,001</u>	<u>7,513</u>
Total operating expenses	<u>\$ 2,378,826</u>	<u>\$ 2,468,953</u>

Appendix 3: Dun & Bradstreet (D&B) Business Report™

Last updated by Perry Franklin on Aug 23, 2022 at 05:34 PM

FRANKLINASSOCIATES LLC



FRANKLIN ASSOCIATES LLC

Unique Entity ID JM9XEWSYFGM8	CAGE / NCAGE 4UCX5	Purpose of Registration All Awards
Registration Status Active Registration	Expiration Date Aug 23, 2023	
Physical Address 250 S Foster DR Baton Rouge, Louisiana 70806-4103 United States	Mailing Address 250 S Foster DR Baton Rouge, Louisiana 70806-4103 United States	

Business Information

Doing Business as (blank)	Division Name (blank)	Division Number (blank)
Congressional District Louisiana 06	State / Country of Incorporation Louisiana / United States	URL http://www.franklinassociates.com

Registration Dates

Activation Date Sep 2, 2022	Submission Date Aug 23, 2022	Initial Registration Date Aug 9, 2007
---------------------------------------	--	---

Entity Dates

Entity Start Date Sep 13, 2005	Fiscal Year End Close Date Dec 31
--	---

Immediate Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Highest Level Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Executive Compensation

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) receive both of the following: 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?

No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?

Not Selected

Proceedings Questions

Is your business or organization, as represented by the Unique Entity ID on this entity registration, responding to a Federal procurement opportunity that contains the provision at FAR 52.209-7, subject to the clause in FAR 52.209-9 in a current Federal contract, or applying for a Federal grant opportunity which contains the award term and condition described in 2 C.F.R. 200 Appendix XII?

No

Does your business or organization, as represented by the Unique Entity ID on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

Not Selected

Within the last five years, had the business or organization (represented by the Unique Entity ID on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State (1) criminal proceeding resulting in a conviction or other acknowledgment of fault; (2) civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or (3) administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault?

Not Selected

Exclusion Summary

<https://sam.gov/entity/JM9XEWSYFGM8/coreData?status=Active>

Page 1 of 4

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 3 of this proposal

Last updated by Perry Franklin on Aug 23, 2022 at 05:34 PM

FRANKLIN ASSOCIATES LLC

Active Exclusions Records?

No

SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Entity Types

Business Types

Entity Structure Other	Entity Type Business or Organization	Organization Factors Limited Liability Company
Profit Structure For Profit Organization		

Socio-Economic Types

Minority Owned Business
Self Certified Small Disadvantaged Business
Black American Owned

Check the registrant's Repts & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

Financial Information

Accepts Credit Card Payments No	Debt Subject To Offset No
---	-------------------------------------

EFT Indicator 0000	CAGE Code 4UCX5
------------------------------	---------------------------

Electronic Funds Transfer

Account Type Checking	Routing Number *****5420	Lock Box Number (blank)
Financial Institution B1BANK	Account Number *****14	

Automated Clearing House

Phone (U.S.) 2252487638	Email jack.wilkes@b1bank.com	Phone (non-U.S.) (blank)
Fax (blank)		

Remittance Address

**PERRY FRANKLIN
250 S Foster DR
Baton Rouge, Louisiana 70806
United States**

Taxpayer Information

EIN *****6744	Type of Tax Applicable Federal Tax	Taxpayer Name Franklin Associates LLC
Tax Year (Most Recent Tax Year) 2019	Name/Title of Individual Executing Consent President	TIN Consent Date Aug 23, 2022
Address 250 S Foster DR Baton Rouge, Louisiana 70806	Signature PJ Franklin	

Points of Contact

Accounts Receivable POC


Kyla Jones

<https://sam.gov/entity/JM5XEW5YFGM8/coreData?status=Active>

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Last updated by Perry Franklin on Aug 23, 2022 at 05:34 PM

FRANKLIN ASSOCIATES LLC

kyla@franklinassociates.com
2257689060

Electronic Business

♀ Kyla Jones kyla@franklinassociates.com 2257689060	250 S Foster DR Baton Rouge, Louisiana 70806 United States
---	---

Government Business

♀ Perry Franklin perry@franklinassociates.com 2257689060	250 S Foster DR Baton Rouge, Louisiana 70806 United States
Kyla Jones, Ms. kyla@franklinassoc.com 2257689060	2148 Government Baton Rouge, Louisiana 70806 United States

Past Performance

♀ Perry Franklin perry@franklinassoc.net 2257689060	2148 Government ST Baton Rouge, Louisiana 70806 United States
---	--

Security Information

Company Security Level (blank)	Highest Level Employee Security Level (blank)
-----------------------------------	--

Service Classifications
NAICS Codes

Primary Yes	NAICS Codes	NAICS Title
	541611	Administrative Management And General Management Consulting Services
	236220	Commercial And Institutional Building Construction
	541320	Landscape Architectural Services
	541612	Human Resources Consulting Services
	541613	Marketing Consulting Services
	541614	Process, Physical Distribution, And Logistics Consulting Services
	541618	Other Management Consulting Services
	541620	Environmental Consulting Services
	541810	Advertising Agencies
	541820	Public Relations Agencies
	541830	Media Buying Agencies
	541840	Media Representatives
	541860	Direct Mail Advertising
	541870	Advertising Material Distribution Services
	541890	Other Services Related To Advertising
	541910	Marketing Research And Public Opinion Polling
	541990	All Other Professional, Scientific, And Technical Services
	561920	Convention And Trade Show Organizers
	711310	Promoters Of Performing Arts, Sports, And Similar Events With Facilities

Last updated by Perry Franklin on Aug 23, 2022 at 05:34 PM

FRANKLIN ASSOCIATES LLC

Size Metrics

IGT Size Metrics

Annual Revenue (from all IGTs)
(blank)

Worldwide

Annual Receipts (in accordance with 13 CFR 121)	Number of Employees (in accordance with 13 CFR 121)
\$16,348,044.00	32

Location

Annual Receipts (in accordance with 13 CFR 121)	Number of Employees (in accordance with 13 CFR 121)
(blank)	(blank)

Industry-Specific

Barrels Capacity	Megawatt Hours	Total Assets
(blank)	(blank)	(blank)

Electronic Data Interchange (EDI) Information

This entity did not enter the EDI information

Disaster Response

Yes, this entity appears in the disaster response registry.

Bonding Levels	Dollars
(blank)	(blank)

States
Any

Counties
(blank)

Metropolitan Statistical Areas
(blank)

Appendix 4: Resumes

Leadership Team

- Brandy Bones, Program Manager
- Perry Franklin, Program Advisor
- Risa Mueller, Program Advisor
- Anette Bargainer, AREA 1 Task Lead
- Lisa Samuels, AREA 2 Task Lead
- James Taylor, AREA 3 Task Lead

Staffing Support Resources

- Jessica Acosta
- Lauren Anderson
- John Armstrong
- Olivia Baumgardner
- Ricky Bolander
- Cindy Campbell
- Ted Devall
- Natalie Eckstrom
- Erica Gauthier
- Lisa Gonzalez
- Avery Jack
- Consuella Hall
- Johnathan Hill
- Sofia Lehmann
- Shawna McElfish
- Andrew Santee
- Vallorie Young

Brandy Bones, MBA, AICP, PMP | Franklin Associates

Program Manager

EXPERIENCE OVERVIEW

Brandy has 17+ years of experience designing and implementing complex federal grant funded programs and helping disadvantaged communities navigate and obtain services and funding. She has worked with over a dozen state agencies representing over \$5 billion in funding to help them stand up infrastructure, affordable housing, economic development, and disaster recovery services to local communities and nonprofits. She is an expert in HUD and FEMA recovery funding and has worked on ARPA, IIJA and America Rescue and Recovery Act (ARRA) initiatives. In her previous role at ICF, she managed a \$25 million P&L and grew grants management team from 40 staff to 92 staff in 22 months.

PROJECT EXPERIENCE

Senior Advisor & Program Implementation Support, North Carolina Office of Recovery and Resiliency (NCORR), 2019-2022

- Assisted with the design and launch of NCORR'S voluntary buyout program including local government outreach, assembling, and training team to process applications, developing business requirements for case management system, helping the State make data driven policy decisions and drive efficiencies.

Senior Advisor & Data and Reporting Analytics Support, Puerto Rico Department of Housing Hurricane Maria Recovery Program, 2019-2022

- Assisted with the launch of the Rehabilitation Reconstruction and Relocation (R3) program to provide funding to homeowners whose homes were damaged by Hurricane Maria including setting up the data and reporting analytics to optimize applicant experience and increase the pace of recovery.

Senior Advisor, Texas General Land Office Hurricane Harvey and CDBG-MIT Program, 2019-2022

- Assisted agency to re-design buyout and infrastructure programs and development standard operating procedures to gain efficiencies and encourage applications from local government subrecipients.

EDUCATION

- MBA, University of Florida, Gainesville, FL, 2015
- B.A., Political Science with honors, Magna Cum Laude, Colgate University, Hamilton, New York, 2005

CERTIFICATIONS & TRAINING

- 2016, American Institute of Certified Planners #29550, American Planning Association Foundations Training
- 2010, Project Management Professional (PMP) #1375808, Project Management Institute

Brandy Bones, MBA, AICP, PMP | Franklin Associates

Program Manager

Project Manager, Technical Assistance, U.S. Virgin Islands Housing Finance Authority, 2018 – 2019

- Ms. Bones led a technical assistance engagement for HUD to help the USVI Housing Finance Authority launch their CDBG-DR Program to recover from damage sustained from Hurricane Maria. Through this engagement, Ms. Bones and her team helped the USVI complete the required financial certifications, implementation plan, and Action Plan. She oversaw the work of two other HUD Technical Assistance Providers and the development of all HUD required deliverables including a limited needs assessment report. Ms. Bones also provided CDBG-DR resources and training to USVI staff and contractors and helped the Housing Finance Agency build capacity and make hires necessary to manage the increased funding for recovery.

Disaster Preparedness, Response and Recovery Toolkit, HUD Office of Housing Counseling, 2017-2018

- Ms. Bones led the development of toolkit to help Housing Counseling Agencies prepare for disasters and respond and recover from disasters when and if they occur.

CDBG-DR Launch Toolkit, HUD Community Planning and Development (CPD), 2017

- Ms. Bones led the development of a launch toolkit for CDBG-DR grantees to help evaluate and build capacity necessary to launch and staff their CDBG-DR programs.

HUD Exchange Website, HUD, 2015-2018

- Ms. Bones supported special technology projects in support of the HUD Exchange, the website that provides resources and assistance to support HUD's community partners. She helped support the full integration of the website's Learning Management System (LMS) with WebEx webinar platform.

Choice Neighborhoods, HUD, 2015-2019

- Ms. Bones helped develop Choice Neighborhoods Inform, an online reporting tool where Choice Neighborhood Implementation grantees enter reporting metrics on a quarterly basis and oversees a team that provides technical assistance to grantees. The system also generates reports to help HUD and grantees track progress towards implementing grantees' Transformation Plans. She developed content for and oversaw the delivery of a Choice Neighborhoods Performance Measurement webinar series which helped Choice Neighborhoods Performance Measurement webinar series which helped Choice Neighborhoods grantees develop an approach to performance measurement and management of neighborhood revitalization projects and programs.

Commonwealth of PA CDBG-DR Program, Department of Community and Economic Development (DCED), 2015-2018

- Ms. Bones oversees this work with PA which included updating and writing the Action Plan Amendments for both of their CDBG-DR allocations and writing and updating the policies and procedures for the Buyout Program, Housing Rehabilitation, and Infrastructure Program. Ms. Bones also delivered a one day CDBG-DR training to DCED and other state agency staff.

Brandy Bones, MBA, AICP, PMP | Franklin Associates

Program Manager

PROFESSIONAL MEMBERSHIPS

Project Management Institute

EMPLOYMENT HISTORY

Franklin Associates, LLC	Vice President	2022-Present
ICF	Vice President	2005-2022
Philadelphia Public Health Department	Solutions Consultant	2013-2014
HelloWallet	Consultant	2009
Brookings Metropolitan Policy Program	Consultant	2008

Perry Franklin, MBA | Franklin Associates

Program Advisor

EXPERIENCE OVERVIEW

Perry founded Franklin Associates LLC, then Franklin Industries LLC, in 2005 in the wake of Hurricanes Katrina and Rita. At that time he served on the Governor's Housing Task Force and worked tirelessly in the housing development arena. Seventeen years later, Perry leads his team of professionals by example. Franklin Associates specializes in staff augmentation, disaster management, community engagement, and governmental relations. Perry has 17+ years of experience managing and advising project-based staff augmentation and 30+ years of experience with community redevelopment and stakeholder and community engagement.

PROJECT EXPERIENCE

Strategic Communications Lead, LA SAFE, Foundation for Louisiana, Jefferson, Lafourche, Plaquemines, St. John Baptist, St. Tammany, and Terrebonne Parishes, 2017

- Franklin Associates was contracted by the Foundation for Louisiana to assist OCD-DRU and a broad team of planners, engineers, architects, and social scientists in preparing and guiding the implementation of a communications strategy to inform and engage the populations of six coastal parishes about urgent coastal issues and identify proactive steps they might take to mitigate risk and increase their resilience. The year one LA SAFE process is now beginning its second round of six parish-wide meetings. It is scheduled to culminate at the end of December with a final Adaptation Plan, having components specific to each parish.

Public Engagement Lead, I-10 Improvements (DOTD Stages 0 and 1), consultant to Providence for the LADOTD, Baton Rouge, LA, 2016- Present

- Franklin drafted and guided the implementation of a stakeholder engagement plan for this transportation improvements project. Large public meetings organized by Franklin occurred on both sides of the Mississippi River: in Port Allen/Addis as well as Baton Rouge. Two scientific telephone poll surveys were completed by the LSU School of Public Policy under the direction of Franklin, and these were augmented with an online poll advertised through traditional and social media. Though not a random sample, the online poll of more than 13,000 respondents strongly agreed with and reinforced the results of the scientific polls.

EDUCATION

- BS, Louisiana State University, Baton Rouge, LA, 1992
- MS, Business Management, Louisiana State University, Baton Rouge, LA, 1998

CERTIFICATIONS & TRAINING

- Louisiana Registered Lobbyist
- Licensed Construction Contractor #44067
- Licensed Real Estate Broker #069685

Perry Franklin, MBA | Franklin Associates

Program Advisor

Franklin assisted with meeting facilitation, stakeholder and elected officials' engagement, and documentation of each.

Public Engagement Lead, Lafayette Central Park, Conceptual Design Phases 1 and 2, Subconsultant to Design Workshop for Lafayette Central Park LLC, Lafayette, LA, 2014

- Franklin Associates was a consultant to Design Workshop charged with preparing a park master plan for the approximately 100-acre property locally known as "the Horse Farm" on Johnson Street in Lafayette. Now renamed Moncus Park in honor of a key benefactor, both fundraising and phase 1 construction are proceeding.

Facilitator, Blue Ribbon Commission Facilitation, Bayou Corne & Grand Bayou, LA., 2013

- Facilitated the implementation of a 13-member Blue Ribbon Commission, assisted in international coordination of all commission meetings, and facilitated public meetings, onsite, field and conference call meetings.

Public Meeting Facilitator, NOAA Outreach – Deepwater Horizon, US Department of the Interior, Gulf Coast States, 2012-2016

- Led development of a grassroots community education effort in advance of public meetings. Facilitated two rounds of twelve public meetings for the NOAA's NRDA Deepwater Horizon Spill BP oil spill in coastal cities located in Florida, Alabama, Mississippi, Louisiana, Texas and Washington, D.C.

EMPLOYMENT HISTORY

Franklin Associates	President	2005-Present
Mid-City Redevelopment Alliance	Director	1994-1997;1998-2006
Exxon Mobil	Public Affairs Coordinator	1997-1998

Risa Mueller, PMP | Franklin Associates

Program Advisor

EXPERIENCE OVERVIEW

Risa's experiences have included program development and policy creation on federal programs, and well as developing, implementing, and evaluating project processes and procedures, as well as communications and public outreach plans for a wide variety of disciplines, including planning and transportation.

Her contributions to program development have allowed precedent-setting new programs to be initiated and implemented swiftly and successfully. When it comes to planning and implementing efforts, Risa strives to maintain forward progress while keeping all stakeholders informed.

PROJECT EXPERIENCE

Program Manager, Pecan Acres Buyout & Resettlement Project, Louisiana OCD/DRU/LHC, 2018 - Present

- Developed processes necessary to stand up CDBG-DR program and implement in timely fashion. Provided policy and technical advisory assistance, initiated case management processes, managed workflows with other state contractors to effect forward movement, providing continued leadership related to Louisiana's first resettlement project and its new subdivision development.

Program Manager, Solution 4 Buyout & Housing Incentive Program/Restore LA Subprogram, Louisiana OCD/DRU/LHC, 2018-2021

- Developed processes necessary to stand up CDBG-DR program and implement in timely fashion. Provided policy and technical advisory assistance, initiated case management processes, managed workflows with other state contractors to effect forward movement, providing continued leadership related to Louisiana's first statewide flood way property buyout program.

HIGHLIGHTS

- Spearheaded program design/implementation/program management for Louisiana's first buyout and resettlement programs
- Managed LHC Program Management for Disaster Response and Recovery Housing Programs Contract 2016-2022

EDUCATION

- B.A., Journalism, Louisiana State University, Baton Rouge, LA 1989

CERTIFICATIONS & TRAINING

- NEPA and Transportation Decision Making
- Project Management Professional-PMP Certification #1201964 since 2008

Risa Mueller, PMP | Franklin Associates

Program Advisor

Program Manager, Isle de Jean Charles Resettlement Project (Program Leadership and Case Management), Louisiana OCD-DRU/LHC, 2018-2021

- Coordinated programmatic processes and finalized policies to develop and launch the resettlement application intake and case management efforts needed to effectively actualize the NDR-funded resettlement master plan while providing a native Terrebonne Parish insight to the planning process.

Program Manager and Communications Lead, LA SAFE Project, Statewide/Louisiana, 2016 – 2018

- Developed and implemented communications plan for statewide adaptation strategy development efforts in conjunction with large project team. Managed internal team and sub consultants, working alongside numerous subcontractors to Foundation for Louisiana and OCD-DRU, which provided communications support.

Project Director, Road Home Social Services Liaison Project, Statewide/Louisiana, 2015-2017

- Managed statewide CDBG-DR compliance outreach contract to minimize recapture impacts on both the State of Louisiana and state residents as much as possible. Assisted OCD-DRU in managing subconsultants statewide and handling case assignments, creating innovating approaches to case management to increase compliance rates among non-compliant Road Home grantees across the state. Drafted programmatic policy revision language and APA rollout talking points for implementation.

Project Manager/Public Engagement Lead, NOAA Outreach – Deepwater Horizon, U.S. Department of the Interior, Gulf Coast States, 2013-2014

- Developed and implemented grassroots community education efforts in coordination with local, state, and federal entities prior to round of public hearings in five coastal states. Managed stakeholder database development, materials creation and implementation of dozens of community meetings and nonprofit meetings conducted over 5 Gulf states including Louisiana.

Facilitator, Blue Ribbon Commission Facilitation, Bayou Corne & Grand Bayou, LA., 2013

- Facilitated the implementation of a 13-member international Blue Ribbon Commission related to Bayou Corne sinkhole, coordinated commission meetings, facilitated public meetings, on site, field, and conference call meetings. Provided technical report review assistance

Project Manager and Leadership Training, OURREGION Sustainability Plan Public Engagement Project, Houston-Galveston Area Council with AECOM, 2011-2013

- Developed and implemented regional approach to community leadership training to support engagement; developed and initiated community ambassador teams throughout 13-country regions; managed subconsultant approach to regional planning survey delivery.

Risa Mueller, PMP | Franklin Associates

Program Advisor

Project Manager and Public Outreach Lead, Bayou Health Rollout, Louisiana Department of Health, Statewide/Louisiana, 2011-2012

- Created and implemented direct internal LDH staff trainings and community education efforts for public interactions for the transition from legacy Medicaid to BAYOU HEALTH for the LDH across 64 parishes. Franklin coordinated logistics and staffing for more than 140 large-scale events and 500+ smaller scale events over a 6-month period. Personally coordinated interactions between five managed care entities and State personnel in tandem with rollout, as well as directly conducting numerous educational sessions across the state. Mueller also managed and participated in a legislative educational campaign related to the Healthy Louisiana/managed care model topic in 2016-2017.

Project Manager/Public Engagement Lead, I-49 Inner City Connector EIS/Stage 0 and Stage 1, Northwest Louisiana Council of Governments, 2009-2011; 2011-Present

- Developed and implemented Caddo Parish stakeholder and elected official regional educational approach for engagement and transportation plan development, working with multiple subcontractors and local, state, and federal agencies. Managed team which developed slate of context sensitive solutions for reviews and discussion throughout multiple rounds of feedback and coordinated federal documentation.

Deputy Director, Community and Governmental Affairs, Road Home Homeowner Program, Statewide/Louisiana and 15 additional states, 2006-2009

- Developed, and implemented and managed team of 15 outreach and governmental affairs personnel deployed throughout the state to educate program applicants and coordinate issues management throughout program period. Oversaw delivery of more than 2500 engagements. Developed programmatic resolution approaches, including compliance approaches, based on inputs from field. Deployed mobile units throughout the country to reach displaced residents. Developed and implemented program engagement plans throughout contract period. Drafted policy revision language for consideration by change review board.

EMPLOYMENT HISTORY

Franklin Associates, LLC	Senior Vice President	2006-Present
CASA	PR/Fundraising Director	2005-2006
Author	PR Practitioner	2001-2004
Columbia Healthcare	PR/Marketing Director	1994-2000
Ochsner Clinic	PR/Marketing Specialist	1993-1994
Capital Area American Red Cross	PR/Fundraising	1992-1993

Annette Bargainer | GrantWorks, Inc.

Area 1 Task Lead

EXPERIENCE OVERVIEW:

Annette Bargainer has 21 years of grant application experience. She develops and writes competitive grant applications for projects ranging from \$50,000 to over \$1 million on behalf of clients. Annette prepares proposals by conducting research, gathering internal and external data to support grants requests, writing drafts, and obtaining approvals. She identifies projects and funding needs and opportunities and attends strategy meetings. She also communicates the proposal strategy and progress to stakeholders and obtains input and signoff on content from others as needed. Annette writes and edits executive summaries, conclusions, and organizational and program descriptions.

PROJECT EXPERIENCE:

Grant Writer, GrantWorks, Inc., Austin, Texas, October 2019 – Present

- Works with cities and counties to prepare grant applications according to all program requirements
- Provides general advice and technical assistance to ensure the entity selects the most fundable project
- Completes and submits grant applications to the proper funding program on or before the deadline
- Specializes in grants from multiple funding agencies

Senior Grant Specialist, Lone Star Circle of Care, Georgetown, Texas, October 2015 – October 2018

- Wrote competitive grant applications for a federally qualified health center to federal funding agencies and private foundations to secure general operating and special project funding
- Submitted regular progress and expenditure reports to funding agencies for active grants
- Lead researcher and author of the health center's annual needs assessment as required by the Health Resources Services Administration (HRSA)

Grant Consultant, Langford Community Management Services and GrantWorks, Inc., Austin, Texas January 2009 – October 2015

- Researched, developed, and wrote competitive grant applications ranging from \$50,000 to over \$1 million on behalf of small cities and counties throughout Texas
- Managed funded projects and developed relationships with staff of various federal and state agencies to ensure all project outcomes and expenditures complied with each funder's regulations

EDUCATION:

- Bachelor of Journalism, Journalism, University of Texas at Austin, Austin, Texas, 1991

CERTIFICATIONS & TRAININGS

- Texas CDBG Certified Administrator, Texas Department of Agriculture, 2021

Annette Bargainer | GrantWorks, Inc.

Area 1 Task Lead

Grant Consultant, Langford Community Management Services and GrantWorks, Inc., Austin, Texas January 2009 – October 2015 (Continued)

- Prepared and submitted project status reports and reimbursement requests according to each funder's requirements
- Prepared and submitted project status reports and reimbursement requests according to each funder's requirements

Foundation Coordinator, Georgetown Independent School District Education Foundation, Georgetown, Texas, March 2007 – March 2008

- Coordinated with the board of directors and school district leadership to secure non-traditional funding from private and corporate donors and foundations for innovative school projects and programs
- Developed grant applications, held applicant training, and reviewed applications submitted to the foundation to determine grant awards for teachers and staff
- Supported the board of directors' fundraising efforts by scheduling appointments with potential donors and maintaining the donor database
- Arranged monthly board meetings, including preparing agendas, assembling, and distributing board packets, and securing location and catering
- Wrote, edited, and managed the marketing design process and public information pieces, including brochures, event programs, and press releases

Environmental Project Manager, Williamson County, Cedar Park, Texas, May 2001 – March 2007

- Prepared the yearly budget and grant applications, administered state and federal grant awards, and approved expenditures of the Williamson County Conservation Foundation (WCCF)

EMPLOYMENT HISTORY:

2019 - Present		GrantWorks, Inc., Austin, Texas Grant Writer
2015 - 2018		Lone Star Circle of Care, Georgetown, Texas Senior Grant Specialist
2009 - 2015		Langford Community Management Services and GrantWorks, Inc., Austin, Texas Grant Consultant
2007 - 2008		Georgetown Independent School District Education Foundation, Georgetown, Texas Foundation Coordinator

Lisa Samuels | GrantWorks, Inc.

Area 2 Task Lead

EXPERIENCE OVERVIEW:

Lisa Samuels is a Grant Manager whose overall experience encompasses organizing people and developing processes to implement federal grants effectively. She delivers hands-on leadership and direction in grant-related procedures and practices. Lisa maintains a working knowledge of grant guidelines, policies, and procedures while forming an opinion for approving and denying applications and draw requests for multiple programs.

PROJECT EXPERIENCE:

Grant Manager, Hurricane Harvey CDBG-DR Housing Program Management Support Services, Texas General Land Office, City of Houston and Harris County, Texas, August 2021 - Present

- Maintains a working knowledge of CDBG-DR guidelines, policies and procedures
- Approves and denies applications and draw request for multiple programs

Infrastructure Specialist/Team Lead, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, May 2013 – August 2021

- Provides oversight of assigned Infrastructure Programs
- Accountable for budget and administration for Non-Federal Cost Share Public Assistance Program (FEMA PA Match) and HMGP Global Match Program
- Established performance measures and program design of disaster recovery activities/programs identified as priorities by OCD using CDBG and other recovery funds
- Conducted informational meetings and gatherings for applicants, communicating program eligibility requirements to audiences including COSCDA
- Provided specialized technical advice throughout all phases of implementation
- Ensured compliance in specialized recovery program areas
- Ensured compliance and adherence to program guidelines and project budgets
- Assisted management in the development and implementation of goals, objectives, policies, procedures, performance objectives, standards, and reporting systems for specialized disaster recovery program areas or project

EDUCATION:

- Bachelor of Science in Business Management, Amberton University, Garland, Texas, 2021

CERTIFICATIONS & TRAININGS

- Various HUD Training, 2020
- Various Mitigation Training, 2019-2020
- Various FEMA Trainings, 2019
- Labor Compliance Training, 2015
- Excel, Lantec of Louisiana, 2015
- CDBG Boot Camp, 2014
- CDBG Training Modules, 2013

Lisa Samuels | GrantWorks, Inc.

Area 2 Task Lead

Infrastructure Specialist/Team Lead, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, May 2013 – August 2021 (Continued)

- Used technical background and relationship with organizations in a manner that demonstrates an understanding of other disaster-related programs and specialized disaster recovery needs

Eligibility Manager, First American, Galveston, Texas, February 2009 – November 2012

- Managed the eligibility and benefit determination teams in the administration of federal funds through the Galveston County Housing Assistance Homeowners, Rental and Demolition Programs
- Interfaced with the public via an explanation of requirements and offering problem resolution
- Practiced leadership through coaching, for development and direction
- Knowledgeable of and performed the tasks involving application review, eligibility criteria, duplication of benefits, title/ownership, and benefits determined using HUD Section 8, CDBG, and GLO guidelines
- Instrumental in the continuing design, process/workflow, building, and maintaining of overall eligibility practices
- Ensured applications are progressing through each phase of the eligibility process.
- Assigned tasks, goal setting, and leading teams to accomplish critical tasks on a defined schedule

Underwriting/Case Manager, Small Rental Property Program, Louisiana Office of Community Development-Disaster Recovery Unit/ICF International, Baton Rouge, Louisiana, January 2007 – February 2009

- Performed duties of underwriter/case manager while fulfilling simultaneous roles of increasing managerial scope in the implementation and distribution of billions of dollars in federal funds via the Road Home Small Rental Property Program
- Served as the point of contact for the underwriters/case managers and processors
- Supervised call center with the additional responsibility of procedural training
- Assisted in workflow development for pre-closing and post-closing guidelines, while continually working to improve processes and produce effective metrics
- Performed quality reviews and approval for closings as well as closing document review
- Delivered cross-functional training to employees in all departments
- Coordinated various projects, while serving as a liaison between lending, policy, and quality review teams
- Explained program requirements to owners via escalations

EMPLOYMENT HISTORY:

2021 - Present		GrantWorks, Inc., Baton Rouge, Louisiana Grant Manager
2013 - 2021		Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana Infrastructure Specialist/Team Lead
2009 - 2012		First American, Galveston, Texas Eligibility Manager
2007 - 2009		ICF International, Baton Rouge, Louisiana Underwriting/Case Manager

James Taylor, AICP | Franklin Associates

Area 3 Task Lead

EXPERIENCE OVERVIEW

James has extensive experience managing the public engagement aspects of recreation and transportation planning projects including using GIS to make sense of data through spatial mapping to see where and how outreach efforts are working and where outreach is having Intended Impact and where additional work remains. James offers 26 years of professional experience that include helping clients understand the Impact of and return on their public Investments utilizing a combination of website, social media, and email campaign analytics. As a certified planner, James also worked on over 100 projects that Include: park and recreation facility designs, regional recreation and open space master plans, commercial landscape designs, ecological and habitat restoration plans, cultural and heritage tourism plans, and redevelopment master plans.

PROJECT EXPERIENCE

Strategic Communications Lead, LA SAFE Foundation for Louisiana in Jefferson, Lafourche, Plaquemines, St. John the Baptist, St. Tammany, and Terrebonne Parishes, 2017

- Franklin Associates was contracted by the Foundation for Louisiana to assist OCD-DRU and a broad team of planners, engineers, architects, and social scientists in preparing and guiding the implementation of a communications strategy to inform and engage the populations of six coastal parishes about urgent coastal issues and identify proactive steps they might take to mitigate risk and increase their resilience. Mr. Taylor led the initiatives of development of all communications templates in use on the project, including branding, media, website, and social media tools. The year one LA SAFE process is now beginning its second round of six parish-wide meetings. It is scheduled to culminate at the end of December with a final Adaptation Plan, having components specific to each parish.

EDUCATION

- MLA, Master of Landscape Architecture, Louisiana State University, Baton Rouge, LA, 1996
- BS, Horticulture, Clemson University, Clemson, SC, 1989

CERTIFICATIONS & TRAINING

- 2017, Community Resilience, FEMA AWR-228 Certificate of Completion
- 2016, HUD Housing Quality Standards Certification of Proficiency
- 2006, Certified Planner, American Institute of Certified Planners, #021110
- 1997, GIS, Intergraph MGE Foundations Training

James Taylor, AICP | Franklin Associates

Area 3 Task Lead

Public Engagement Lead, I-10 Improvements (DOTD Stages 0 and 1), consultant to Providence for the Louisiana DOTD, Baton Rouge, LA, 2016 – present

- Franklin drafted and guided the implementation of a stakeholder engagement plan for this transportation improvements project. Large public meetings organized by Franklin occurred on both sides of the Mississippi River: in Port Allen/Addis as well as Baton Rouge. Two scientific telephone poll surveys were completed by the LSU School of Public Policy under the direction of Franklin, and these were augmented with an online poll advertised through traditional and social media. Though not a random sample, the online poll of more than 13,000 respondents strongly agreed with and reinforced the results of the scientific polls. Franklin assisted with meeting facilitation, stakeholder and elected officials' engagement, and documentation of each. Mr. Taylor led all survey development, data analysis of community stakeholder input and documentation efforts for this project for Franklin, as well as assisting the engineering team in development of appropriate public participation exercises to gain insights into public opinion at community meetings.

Public Engagement Lead, Lafayette Central Park, Conceptual Design Phase 1 and 2, Subconsultant to Design Workshop for Lafayette Central Park LLC. Lafayette, LA, 2014

- Franklin Associates was a consultant to Design Workshop charged with preparing a park master plan for the approximately 100-acre property locally known as "the Horse Farm" on Johnson Street in Lafayette, LA. Mr. Taylor led the public engagement effort including meeting venue identification and scheduling, event planning, assistance with presentation materials, direct community outreach, meeting facilitation and documentation assistance, collaboration with all other team members, and governmental affairs consulting. Now renamed Moncus Park in honor of a key benefactor, both fundraising and phase 1 construction are proceeding.

EMPLOYMENT HISTORY

Franklin Associates, LLC	Planner, Project Manager	2011-Present
IBI Group, Inc./RMPK Group, LLC	Graphic Designer	2000-2010

EXPERIENCE OVERVIEW:

Jessica Acosta is a Grant Writing Coordinator that has joined the GrantWorks in early 2022. Jessica applies her communication skills to establish and maintain effective working relationships with staff, state and federal agencies, and private organizations. She provides support throughout the entire grant application lifecycle from inquiry to application, to reporting, and the archiving of files after a grant application is submitted.

PROJECT EXPERIENCE:

Grant Writing Coordinator, GrantWorks, Inc., Austin, Texas, March 2022 – Present

- Assists in the completion of grant application tasks
- Guides clients through grant and funding stream application processes and serves as a liaison with grant subject matter experts (SMEs)
- Facilitates integrated stakeholder communications
- Performs document quality reviews to ensure grant applications comply with formatting and content requirements

Lecturer, University of Texas at San Antonio, San Antonio, Texas, January 2022 - March 2022

- Contributing lecturer at the University of Texas, specifically in the COM 2113: Public Speaking class
- Created and lectured material based on the course textbook for the year
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Often met with students to discuss and provide feedback on exam results, or any class topic as requested

Adjunct Professor/Dual Credit Instructor, Texas A&M University, San Antonio, Texas, August 2021 – May 2022

- In charge of the SPCH 1315: Fundamentals in Public Speaking class
- Created and lectured material based on the course textbook for the year
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Met with students to discuss and provide feedback on exam results, or any class topic as requested

Adjunct Faculty/Concurrent Enrollment Instructor, Community College of Denver, Denver, Colorado, August 2019 - May 2021

Adjunct faculty/concurrent enrollment instructor at the Community College of Denver, specifically COM 115: Public Speaking and COM 125: Interpersonal Communication classes

EDUCATION:

- Master of Art, Communication, University of Texas at San Antonio, San Antonio, Texas, 2018
- Bachelor of Art, Communication, University of Texas at San Antonio, San Antonio, Texas, 2015

Jessica Acost | GrantWorks, Inc.

Staffing Support Resource

Adjunct Faculty/Concurrent Enrollment Instructor, Community College or Denver, Denver, Colorado, August 2019 - May 2021 (Continued)

- Created, and lectured material based on the course textbook for the year
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Met with students to discuss and provide feedback on exam results, or any class topic as requested.
- Assisted in the development of an asynchronous course for the institution's Open Educational Resource for Interpersonal Communication sections

Adjunct Faculty, Front Range Community College, Denver, Colorado, January 2020 – August 2021

- Adjunct faculty at the Front Range Community College, specifically the COM 115: Public Speaking class
- Created and lectured material based on the course textbook for the year
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Met with students to discuss and provide feedback on exam results, or any class topic as requested

Affiliate Professor, Metropolitan State University of Denver, Denver, Colorado, August 2019 – December 2019

- Affiliate professor at the Community College of Denver, specifically CAS 1710: Interpersonal Communication and CAS 1010: Public Speaking classes
- Created and lectured material based on the course textbook for the year.
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Met with students to discuss and provide feedback on exam results, or any class topic as requested

Lecturer, University of Texas at San Antonio, San Antonio, Texas, January 2019 – May 2019

- Contributing lecturer at the University of Texas, specifically in COM 2113: Public Speaking and COM 1053: Business and Professional Speech classes
- Created and lectured material based on the course textbook for the year
- Generated assignments, gave/led speeches, proctored exams, as well as graded them accordingly
- Met with students to discuss and provide feedback on exam results, or any class topic as requested

EMPLOYMENT HISTORY:

2022 - Present		GrantWorks, Inc., Austin, Texas Grant Writing Coordinator
2022 - 2022		University of Texas at San Antonio, San Antonio, Texas Lecturer
2021 - 2022		Texas A&M University, San Antonio, Texas Adjunct Professor/Dual Credit Instructor
2019 - 2021		Community College of Denver, Denver, Colorado Adjunct Faculty/Concurrent Enrollment Instructor
2020 - 2021		Front Range Community College, Denver, Colorado Adjunct Faculty
2019 - 2019		Metropolitan State University of Denver, Denver, Colorado Affiliate Professor

EXPERIENCE OVERVIEW:

John Armstrong has over 12 years of experience analyzing data sets across many sectors, including disaster recovery, property and casualty insurance, community development, small-business retail, and governmental relations and compliance. He has worked specifically with governments in southern Louisiana with recovery from Hurricanes Gustav, Ike, Isaac, and Laura, and the August 2016 major flood event. John is currently working through GrantWorks with the Texas General Land Office on direct allocations to Harris County and the City of Houston for disaster recovery from Hurricane Harvey.

PROJECT EXPERIENCE:

Grant Data Analyst, Hurricane Harvey CDBG-DR Program Management Support Services, Texas General Land Office, City of Houston and Harris County, Texas, March 2022 – Present

- Develops reports to effectively communicate project status, both to clients and among teams, at varying levels of technical depth
- Analyzes, develops, and tracks new enhancements to grant management system, including improved reporting via Excel, Power BI and QuickBase
- Implements effective data management techniques to allow teams to collaborate and maintain data integrity
- Develops visual reporting tools for internal and client use
- Combines data science with CDBG-DR knowledge to ensure efficient and compliant use of federal funds

EDUCATION:

- Bachelor of Science, Mathematics, Louisiana State University, Baton Rouge, Louisiana, 2008

CERTIFICATIONS & TRAININGS

- Certified Insurance Service Representative, 2016
- CDBG-DR Bootcamp, Baton Rouge, Louisiana, 2017

Risk Statistics Specialist, Louisiana Office of Risk Management, Baton Rouge, Louisiana, May 2018 – March 2022

- Developed statewide premiums for each line of insurance coverage along with the fair allocation of those premiums to insured state agencies
- Collected risk exposures quarterly from state agencies, and maintained the list of insured state agencies
- Developed the total claims reserves for each line of coverage used in the State annual financial reports
- Reviewed and analyzed policies written by the Office of Risk Management to correlate developed exposure data to coverage lines
- Reviewed appropriation bills, state organizational charts, etc. for changes in state organization that would affect premium allocation and overall state risk
- Performed variance analysis on loss data to analyze changes in loss payout ratios including indexing, trend factors, and rate changes to analyze agency efficiency
- Analyzed statistical reports on paid and incurred basis for all coverages to ensure adequate reserve levels

John Armstrong | GrantWorks, Inc.

Staffing Support Resource

Reporting Analyst, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, May 2017 – May 2018

- Developed and submitted performance reports to HUD on multiple CDBG-DR grants, including Hurricanes Katrina and Rita, Hurricane Isaac, and the National Disaster Resiliency (NDR) project
- Used the DRGR system, SharePoint, Business Objects, and other database systems
- Monitored, tracked, and documented all action plan, budget, obligation, program income, and policy changes on those grants
- Reviewed and made recommendations regarding grant systems and operations to increase financial and performance efficiency and ensure compliance with all federal and state regulations
- Developed innovative solutions to new difficulties encountered during disaster recovery and ensure that those solutions are expandable to existing and future grants

PROFESSIONAL AFFILIATIONS:

- Member, Casualty Actuarial Society
- Member, Baton Rouge Chamber of Commerce

EMPLOYMENT HISTORY:

2022 - Present		GrantWorks, Inc., Baton Rouge, Louisiana Data Analyst
2021 - Present		New Leaf Consulting, LLC, Baton Rouge, Louisiana Consultant
2018 - 2022		Louisiana Office of Risk Management, Baton Rouge, Louisiana Risk Statistics Specialist
2017 - 2018		Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana Reporting Analyst
2015 - 2017		Louisiana Office of Risk Management, Baton Rouge, Louisiana Risk Underwriter/Statistics

Olivia Baumgardner | GrantWorks, Inc.

Staffing Support Resource

EXPERIENCE OVERVIEW:

Olivia Baumgardner has 4 years of community development experience along with 4 years of grant application writing experience. Before coming to GrantWorks, Olivia worked at a regional planning commission writing state and federal grants for a seven-county region in southeastern Illinois. During her tenure at the commission, she served as the main grant writer and handled all environmental clearances needed for those grants. Olivia understands community needs and how to best relay those needs in all grant applications that she writes.

PROJECT EXPERIENCE:

Grant Writer, GrantWorks, Inc., Austin, Texas, February 2021 - Present

- Works to identify potential grant opportunities and assess their utility and feasibility given GrantWorks clients' needs and capacities.
- Meets with clients, coordinates the application process, creates, and compiles application documents, and works under tight deadlines
- Interacts with public officials, business owners, engineers, the public, and other involved parties via telephone, email, and in-person for public input and information gathering

Executive Director, Greater Wabash Regional Planning Commission, Albion, Illinois, June 2019 – December 2020

- Administered federal and state contracts and grants and oversaw all federal and state environmental clearances for grant projects
- Served as a liaison with federal, state, and local officials
- Maintained the official website and social media and wrote all press releases and newsletters.
- Served as the Loan Officer for the \$1 million Revolving Loan Fund
- Supervised all Commission employees, prepared and administered the annual operating budget, and facilitated and implemented community and economic development planning for the seven-county region.

EDUCATION:

- Bachelor of Science, Communication Studies, Southern Illinois University, Carbondale, Illinois, May 2016

CERTIFICATIONS & TRAININGS

- Inbound Certified, Hubspot Academy, October 2020 – November 2022

Olivia Baumgardner | GrantWorks, Inc.

Staffing Support Resource

Community Development Manager, Greater Wabash Regional Planning Commission, Albion, Illinois, March 2019 – June 2019

- Served as the primary grant writer for local, state, and federal grants
- Maintained all grant activities and status of grant timelines and coordinated all daily activities of the Community Development Coordinators.
- Oversaw the management of awarded grants and recordkeeping for all projects
- Created and disseminated quarterly newsletters, maintained office website and social media, and maintained relationships with over 50 clients/units of local government

Community Development Coordinator, Greater Wabash Regional Planning Commission, Albion, Illinois, January 2017 – February 2019

- Assisted with community, economic, and workforce development in a seven-county region
- Created and maintained brochures, newsletters, websites, and social media
- Moderated recurring community economic development strategy meetings, implemented regional workforce development strategy, coordinated collaborations between employers/businesses, and participated in community college curriculum planning

PROFESSIONAL AFFILIATIONS:

- Secretary, Fairfield's Business and Workforce Development Committee, October 2019 - December 2020
- Secretary, Y-Fairfield, Inc. (Young Professional Organization), July 2018 - December 2020

EMPLOYMENT HISTORY:

2021 - Present	GrantWorks, Inc., Austin, Texas Grant Writer
2019 - 2020	Greater Walbash Regional Planning Commission, Albion, Illinois Executive Director
2019 - 2010	Greater Walbash Regional Planning Commission, Albion, Illinois Community Development Manager
2019 - 2010	Greater Walbash Regional Planning Commission, Albion, Illinois Community Development Coordinator
2016	Banana Republic, Houston, Texas Brand Ambassador

Richard Bolander | GrantWorks, Inc.

Staffing Support Resource

EXPERIENCE OVERVIEW:

Richard "Ricky" Bolander is a financial manager and project controls professional with over 11 years of experience, including program and project management, cost control, and scheduling. Ricky contributes to project planning, budgeting, and overall strategy, conducts and presents feasibility analyses for proposed projects, and establishes key performance indicators. He also monitors and evaluates the overall project, analyzing project data and producing insights to optimize performance.

PROJECT EXPERIENCE:

Project Controls Manager, Hurricane Sandy Long-Term Recovery Program, New York City Housing Authority, New York, New York, December 2020 – Present

- Serves as Project Controls Manager for this program focusing on large, multi-story campuses
- Manages project-level financial reports for NYCHA, working closely with corporate finance and business line management
- Provides cost control support to the project team

Finance Manager, Virgin Islands Emergency Home Repairs, Virgin Islands Housing Finance Authority, St. Croix, St. John, and St. Thomas, U.S. Virgin Islands, June 2020 – Present

- Reviews FEMA-funded payments for PMO and unit price invoices
- Communicates with contractors and others regarding program updates and invoice payments
- Manages the cost and the schedule for ongoing tasks

Finance Manager, Program Management Services, New York City Transit Authority, New York, New York; Massachusetts Department of Transportation, Boston, Massachusetts; and Connecticut Department of Transportation, New Haven, Connecticut, December 2020 – Present

- Oversees project-level financial processes and reporting
- Reviews billing and invoicing for clients
- Prepares the cost and schedule forecasts for corporate accounting

EDUCATION:

- Bachelor of Business Administration, International Business, Texas Tech University, Lubbock, Texas, 2011

CERTIFICATIONS & TRAININGS

- Certified Global Business Professional (CGBP), NASBITE International, Issued January 2011
- JD Edwards EnterpriseOne
- Insight Console
- Business Objects
- Six-Sigma Yellow Belt
- MS Project - Scheduling
- Primavera P6 - Scheduling

Richard Bolander | GrantWorks, Inc.

Staffing Support Resource

Finance Manager, Governor Juan F. Luis Hospital & Medical Center Temporary Hardened Structure and Furniture, Fixtures, & Equipment, St. Croix, U.S. Virgin Islands, June 2020 – Present

- Works closely with project management to provide cost support and maintain project budgets through cost control and forecasting
- Oversees invoicing to the client for equipment purchasing, services, and general conditions
- Manages subcontractor costs by coordinating with procurement and accounts payable
- Supports the project team through tracking materials, equipment, services, and manhours
- Ensures timely payment to vendors and subcontractors per agreement on purchase orders
- Works closely with corporate accounting providing monthly accruals and weekly cash forecasts
- Reviews critical path schedules to validate logic and mitigate potential project delays

Finance Manager, Program Management Services, New York City Department of Environmental Protection and New York City Department of Design and Construction, New York, New York, and Freeport Mc-Moran, Phoenix, Arizona, June 2015 – July 2017

- Managed budgets and estimated/forecasted for multiple large and small projects and programs in the greater New York City area
- Supported corporate accounting to balance finances and resolved backlogged projects nationwide by working closely with clients to update contracts and collect outstanding revenues
- Coordinated manpower and resource sharing for regional directors to meet client and project needs
- Created and distributed project status reports and presentations for corporate management, clients, and JV partners
- Supported corporate management, joint venture partners, and clients to execute various bids, contracts, projects, and other initiatives
- Assisted the business development team by building estimates from project bid sheets

EMPLOYMENT HISTORY

2022		GrantWorks, Inc., New York, New York Senior Project Controls Manager
2020 - 2022		Aptim Environmental & Infrastructure, LLC, New York, New York Project Controls/Finance Manager
2017 - 2020		Rise Collective, New York, New York Executive Director/Treasurer
2015 - 2017		CB&I Environmental & Infrastructure, LLC, New York, New York Project Controls Manager
2014 - 2015		As Our Own, New York, New York Special Project Manager
2012 - 2014		Shaw Environmental & Infrastructure, LLC, New York, New York Project Controls/Cost Specialist

EXPERIENCE OVERVIEW:

Cindy Campbell has experience managing federally funded grant programs for the State of Louisiana. This experience includes program management and implementation to closeout. She has worked with federal, state, and local level agencies. Cindy's most significant experience in compliance and monitoring of regulatory requirements of all phases of various HUD-funded programs. As the Manager of the Small Rental Property Program, Cindy provided leadership for the teams handling appeals, closings, and the call center. She moved to the compliance department to work on monitoring the parishes for proper handling of policies and procedures, procurement, and federal regulations for Low Income Housing programs.

PROJECT EXPERIENCE:

Project Manager, American Rescue Plan Act Project Management, Multiple Local Governments, Multiple Locations, Texas, September 2022 - Present

- Coordinates and manages multiple projects funded primarily by ARPA via the U.S. Treasury
- Communicates with local officials and various state and federal agencies daily.
- Reviews project documents and manages financial details, including contractor pay estimates, professional service invoices, billing projections, and budget tracking
- Tracks and meets performance milestones and deadlines
- Interprets government publications and regulations about project implementation

Housing Finance Manager/Specialist, Louisiana Housing Corporation, Baton Rouge, Louisiana, February 2015 – September 2022

- Managed and administered the State's Affordable Small Rental Property Program
- Reviewed, completed, and submitted Request for Payments
- Kept track and updated the budget expenditures for the program
- Provided all program-related reports to HUD, Louisiana Legislative Auditors, and OCD-DRU
- Reviewed Request for Proposal/Request for Qualifications for outside consultants

EDUCATION:

- Associate of Arts, Paralegal Studies, Louisiana State University, Baton Rouge, Louisiana, 1991

CERTIFICATIONS & TRAININGS

- Redefining Federal Disaster Management, Reznick Group, Baton Rouge, Louisiana, 2011
- CDBG Bootcamp Training, COSCDA, Baton Rouge, Louisiana, 2017
- Community Development Housing and Homelessness, COSCDA, Washington D.C., 2018

Cindy Campbell | GrantWorks, Inc.

Staffing Support Resource

Housing Finance Manager/Specialist, Louisiana Housing Corporation, Baton Rouge, Louisiana, February 2015 – September 2022 (Continued)

- Worked with staff, borrowers, and outside agencies to resolve problems that arise
- Oversaw 12 SRPP staff and their compliance and monitoring of Federal, State, and Local requirements
- Handled all HR-related items, including hiring, training, and day-to-day operations
- Represented the SRPP in any outside meetings, presentations, Zoom calls, and public request

Compliance and Monitoring Specialist, Providence Engineering Corporation and Shaw Environmental & Infrastructure, LLC, Baton Rouge, Louisiana, September 2009 – February 2015

- Ensured compliance with Federal, State, CDBG, and LIHTC regulations
- Conducted audit of each file to verify qualifications and ensure no abusive activity of program money
- On-site monitoring of each property to investigate that proper policies and procedures are being followed.
- Lead for conducting interviews of clients to collect pertinent information for each case
- Developed and analyzed weekly data from each audit performed
- Provided a full detailed report of audit findings for upper Management
- Prepared and preserved pertinent documents on each case file for follow-up discussions, audits, and/or investigations
- Worked daily with others on Auditing Team to prepare a plan of action and/or resolution
- Developed guidelines, policies, applications, and handbooks for CD and CDBG programs

EMPLOYMENT HISTORY:

2022 - Present		GrantWorks, Inc., Baton Rouge, Louisiana Senior Grant Analyst
2015 - 2022		Louisiana Housing Corporation, Baton Rouge, Louisiana Housing Finance Manager/Specialist
2009 - 2015		Providence Engineering Corporation and Shaw Environmental & Infrastructure, LLC, Baton Rouge, Louisiana Compliance and Monitoring Specialist
2006 - 2009		ICF International, Baton Rouge, Louisiana Compliance Manager
2006 - 2009		Primekey Mortgage, Baton Rouge, Louisiana Chief Credit Officer
2004 - 2006		GMFS, Baton Rouge, Louisiana Senior Underwriter
2002 - 2004		PMI Mortgage Insurance Company, Houston, Texas Senior Contract Auditing Underwriter

EXPERIENCE OVERVIEW

Ted Devall has more than 20 years' combined experience in community development, direct residential construction, and management. His ability to facilitate forward progress on efforts involving multiple stakeholders throughout his career have proven to be assets to both clients and team members alike, allowing him to utilize his excellent time, resource, and information management skills in creatively solving problems to successfully meet and exceed project and program goals.

Devall's experience includes ground-level interactions with contractors, homeowners, volunteer programs and grant program administrators. He also brings a background of project oversight, training, nonprofit leadership, capacity building, operationalizing systems, and monitoring and improving performance of multiple field providers across the state to the team. A self-motivator with a positive attitude, Devall's effective interpersonal and communications skills have improved morale and enhanced performance of contractors working under his supervision in the past.

PROJECT EXPERIENCE

Construction Manager, City of Baton Rouge and Build Baton Rouge, Franklin Associates, 2018-Present

- Performed progress, change order and closeout inspections to facilitate successful project completions. Prepared scopes of work and established cost estimates for repair and replacement for more than 500 structures. Knowledge of regulations and codes with which housing standards must comply. Knowledge of modern materials, methods, and procedures.
- Assisted in training development and implementation on statewide energy assistance funding program. Conducted field training statewide for LACAP to assist construction monitors in properly performing/improving their renovation efforts. Conducted performance reviews/delivered training for contractors under my supervisory purview to improve performance.
- Analyzed survey data from contractor inputs to provide insights for efficiencies/additional process improvements. Coordinated monitoring and compliance reviews/documentation for federal grants programs. Handled inventory processes for large-scale sites and programs

EDUCATION:

- MBA, University of Phoenix, 2005
- BS, Family and Consumer Science, Southern University, Baton Rouge, LA, 1996

Ted Devall | Franklin Associates

Staffing Support Resource

EMPLOYMENT HISTORY

Franklin Associates, LLC

Construction Manager

2018-Present

EXPERIENCE OVERVIEW:

Erica Gauthier has 10+ years of experience in working with CDBG-DR funding, along with others. She specializes in data analysis and reporting, using her years of experience to ensure HUD program requirements are met. Erica monitors and evaluates projects, analyzes project data, and produces insights to optimize performance, and identifies problems and shortfalls and proposing solutions. She prepares, reviews, and maintains project documentation and reports including financials.

PROJECT EXPERIENCE:

Grant Analyst, Hurricane Harvey CDBG-DR Program Management Support Services, Texas General Land Office, City of Houston and Harris County, Texas, July 2021 - Present

- Provides various scheduled and ad hoc reports for the Texas General Land Office
- Plays a lead role in compiling required quarterly reports for HUD and the Texas Legislative Budget Board
- Revamped existing financial and project setup trackers to streamline data which allowed her to create various reports to ensure effective project management, including timelines and projections for both construction end dates and expenditure deadlines
- Provides a periodic reassessment to ensure HUD requirements on national objectives are being met

Finance Lead, Restore Louisiana, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, February 2018 – July 2021

- Finance Lead for the Louisiana Restore Program invoices for this \$1B program
- Created BI reports to verify documentation in E-Grant files quickly
- Managed the payment of multiple contracts valued at \$500M and performed monthly reconciliation between the state accounting system and DRGR.
- Created task order trackers for grant management companies working on numerous projects and tracked contract expenditures by task orders, activities, national objectives, and other criteria.

EDUCATION:

- Bachelor of Science, Secondary Education, Louisiana State University, Baton Rouge, Louisiana, 2000

CERTIFICATIONS & TRAININGS

- HUD DRGR Workshop for Disaster Recovery, New Orleans, 2017
- CDBG Advanced Training (COSDA Academy) Baton Rouge, 2016
- COSDA's CDBG Boot Camp, Baton Rouge, 2015
- Disaster Recovery Grant Reporting System Training for DR CDBG Users, New Orleans, 2015

Reporting Specialist/Analyst, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, November 2014 – February 2018

- Served as Reporting Lead for the Louisiana 2016 Floods and Hurricane Isaac, Katrina/Rita, and NCR CDBG-DR grants
- Created and submitted an initial action plan in DRGR for the 2106 Flood grant
- Worked closely with the project managers and submitted Quarterly Performance Reviews (QPRs) in DRGR to compile performance narratives and measures
- Created the Power View Dashboard for management reviews of grants
- Compiled Quarterly Management Reviews after gathering data from numerous sources
- Other reports combine DRGR, ISIS, SharePoint, GIOS, and Excel data. Erica reconciled expenditures on multiple systems (i.e., federal, state, and local agencies)

Appeals Analyst/Reporting, CB&I Environmental & Infrastructure, LLC and Shaw Environmental & Infrastructure, LLC, Baton Rouge, Louisiana, November 2010 – November 2014

- Created and maintained reports using Excel, Access, and Business Objects
- Made appeal determinations based on CDBG and State Program guidelines
- Wrote corresponding determination reports
- Maintained Excel tracking spreadsheet to ensure timely processing of appeals
- Streamlined processes using merge files in Microsoft Word and Excel

EMPLOYMENT HISTORY:

2012 - Present		GrantWorks, Inc., Baton Rouge, Louisiana Grant Analyst
2018 - 2021		Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana Finance Lead
2014 - 2018		Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana Reporting Specialist/Analyst
2010 - 2014		CB&I Environmental & Infrastructure, LLC & Shaw Environmental & Infrastructure, LLC, Baton Rouge, Louisiana Appeals Analyst/Reporting

EXPERIENCE OVERVIEW:

Lisa Gonzalez is a results-orientated accounting professional with broad experience in a deadline-driven environment. Lisa has experience in developing budgets and preparing all internal and external financial statements, ensuring GAAP compliance and regulatory guidelines. Lisa has worked with housing and grants for many years including directly with the state and now with GrantWorks. She is currently coordinating, reviewing, evaluating, and reporting of grants at various stages to determine appropriateness of grant or compliance with requirements and standards.

PROJECT EXPERIENCE:

Senior Grant Analyst, Hurricane Harvey CDBG-DR Program Management Support Services, ERP Economic Revitalization Program, Texas General Land Office, Austin, Texas, September 2020 - Present

- Monitors, evaluates, and reviews eligibility and programmatic compliance at all stages of assigned grants from application to closeout
- Provides feedback and coordinate with GLO partners to ensure compliance
- Provides technical assistance to prospective applicants and subrecipients in accordance with program guidance
- Performs grant management and oversight including review documentation for program compliance including reports, writes and reviews SOPs as changes continue in the processing of application
- Supports Disaster Recovery program by completing timely and thorough application reviews for project eligibility and program compliance
- Prepares requests for information, provide technical assistance as applicable during application phase
- Compiles final application documents
- Provides direction, guidance, technical assistance, and coordination to other grant coordinators through demonstrated CDBG program and grant management knowledge

EDUCATION:

- Bachelor of Science, Business Administration, Texas State University, Austin, Texas, 2005

Finance Manager, Walsh Gallegos Trevino Russo & Kyle, Austin, Texas, June 2017 – April 2020

- Developed the budget and oversees the preparation of internal and external financial statements, ensuring GAAP compliance and regulatory guideline
- Managed in-depth periodic cash flow measurement and forecasting

Finance Manager, Walsh Gallegos Trevino Russo & Kyle, Austin, Texas, June 2017 – April 2020

- Analyzed and reported on financial activities including but not limited to: reconciliations and analytical analysis of interest expense and accrued interest
- Managed operating budgets with a focus on and measurement of cost optimization
- Used Orion Software products, including writing queries and developing reports
- Oversaw weekly and monthly operations performance flash reporting
- Facility remodeling – planning and timelines
- Managed the collections/billing process and the development of metrics to continually improve the collections process
- Provided accounting guidance to a multitude of Shareholders
- Participated in key decisions as a member of the executive management team
- Maintained in-depth relations with all members of the management team
- Oversaw the financial operations that include accounting, billing, and payroll
- Ran monthly, and annual financial reports

Chief Financial Accountant/Finance Manager, Texas Commission on Fire Protection, Austin, Texas, March 2014 – June 2017

- Developed and directed programs to control the financing of agency operations
- Developed methods for the control of cash receipts, deposits, and disbursements; the purchase of services, supplies, and equipment; the documentation of claims for payment; and the preparation and processing of payrolls
- Oversaw and/or prepared annual operating budgets, and reviewed expenditures to ensure that budget limits are not exceeded
- Oversaw the detailed reporting of expenditures and encumbrances made by the various operating units, and may direct the maintenance of the operating budget through centralized purchasing and disbursement
- Oversaw the allocation of state and federal funds to agency operating programs, and develops suitable plans for validating and matching the various federal funds used in financing agency operations
- Helped prepare and coordinate the planning, and development of the agency's annual financial report in accordance with Governmental Accounting Standards Board (GASB) and Office of the Comptroller of Public Accounts requirements
- Developed and directed programs to control the financing of agency operations

EMPLOYMENT HISTORY:

2020 - Present		GrantWorks, Inc., Austin, Texas Senior Grant Analyst
2017 - 2020		Walsh Gallegos Trevino Russo & Kyle, Austin, Texas Finance Manager
2014 - 2017		Texas Commission on Fire Protection, Austin, Texas Chief Financial Account/Finance Manager

EXPERIENCE OVERVIEW:

Consuella (Connie) Hall has over 15 years of experience spanning leadership roles in Louisiana's public and private sectors. As a Senior Grant Analyst, Connie helps to prepare, maintain, and provide project budget information. She works with project managers to provide project scope, cost, and schedule information for grant programs, budgets, financial forecasting, and cash flow projections. She prepares reports on projects and grant funding, provides information for audits on project funding procedures used for managing the funding and expenditures for projects, and provides oversight of subrecipients.

PROJECT EXPERIENCE:

Program Teams Lead, Hurricane Harvey CDBG-DR Program Management Support, Texas General Land Office, Houston, Texas, January 2019 – Present

- Oversees the administration of \$115M including the Homeowner Assistance (\$82M) and Homebuyer Assistance (\$33M) Programs administered by the GLO
- Assists with data analysis and report development
- Monitors team tasks and performance, ensures continuous improvements, and provides a change management
- Provides QA/QC for staff-reviewed grant applications, financial draw requests, and other document submittals for GLO review and approval
- Reviews and interprets program-related correspondence, documents, reports, and forms
- Prepares program files, assists with ongoing audit readiness, and provides support for monitoring/audit reviews

Housing Finance Supervisor, Louisiana Housing Corporation-Recovery Housing Section, Baton Rouge, Louisiana, July 2021 – September 2021

- Administered housing finance programs (Louisiana Neighborhood Landlord Rental Phase 1 (\$41M) and Phase 2 (\$16.5M), East Baton Rouge Rebuilds (\$2M), and East Baton Rouge Rebuilds Developer (\$7M))
- Supervised Housing Finance Specialists and other personnel
- Assisted Housing Recovery Manager with daily flood program operations, compliance reviews, and review of fund expenditures
- Assisted Housing Recovery Manager in the hiring, training, and development of recovery staff
- Assisted with the development of and revisions to program policies and procedures
- Provided highly specialized technical support for the Housing Recovery Manager
- Executed Housing Finance Specialist 3 functions

EDUCATION:

- Master of Public Administration, Public Administration, Louisiana State University, Baton Rouge, Louisiana, 2012
- Juris Doctor, Law, Southern University Law School, Baton Rouge, Louisiana, 2006
- Bachelor of Arts, Mass Communications, Xavier University of Louisiana, New Orleans, Louisiana, 2001

CERTIFICATIONS & TRAININGS

- Non-Active Member, Attorney, Louisiana State Bar Association, 2007

Consuella Hall, JD | GrantWorks, Inc.

Staffing Support Resource

Housing Finance Specialist 3, Louisiana Housing Corporation-Recovery Housing Section, Baton Rouge, Louisiana, May 2017 – June 2021

- Served as Finance Specialist on Louisiana Neighborhood Landlord Rental Phase 1 (\$41M) and Phase 2 (\$16.5M), East Baton Rouge Rebuilds (\$2M), and East Baton Rouge Rebuilds Developer (\$7M) programs
- Evaluated applications for funding
- Assisted in implementing monitoring systems for a compliance review following specified program requirements
- Performed data gathering, statistical analysis, and report generation
- Analyzed management operation, internal controls, and participant files to ensure adequacy, accuracy, and compliance with state and federal regulations
- Provided technical assistance to prospective program participants, active program participants, lenders, and other parties
- Prepared requests for the expenditure of program funds

Disaster Recovery Specialist, Infrastructure Section, Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana, November 2012 – August

- Served as project specialist on 78 projects totaling more than \$127 million under seven programs created to recover from Hurricanes Gustav, Ike, and Isaac
- Managed infrastructure portion (\$65.7M) of Hurricane Gustav/Ike Economic Development and Infrastructure Growth Program (\$80M)
- Managed Hurricane Isaac Parish Priority (\$1.1M) and Statewide Cost-Share for Federal Emergency Management Agency Public Assistance Fund and Transitional Sheltering Assistance (\$5.8M) programs

PROFESSIONAL AFFILIATIONS:

- Member, Louisiana State Bar Association
- Alumna, Academy of the Sacred Heart

EMPLOYMENT HISTORY:

2021 - PRESENT	GrantWorks, Inc., Baton Rouge, Louisiana Senior Grant Manager
2017 - 2021	Louisiana Housing Corporation, Baton Rouge, Louisiana Housing Finance Supervisor and Housing Finance Specialist 3
2016 - 2017	City of Baton Rouge Parish of East Baton Rouge, Office of Community Development, Baton Rouge, Louisiana Urban Development Director
2012 - 2016	Louisiana Office of Community Development-Disaster Recovery Unit, Baton Rouge, Louisiana Disaster Recovery Specialist

Johnathan Hill | Franklin Associates

Staffing Support Resource

EXPERIENCE OVERVIEW

Johnathan is a strategic communications and public outreach expert and currently serves as Franklin Associates' advisory services practice lead. With over 10 years of program implementation and outreach, Johnathan has honed his skills creating and managing engagement plans in different sectors of public projects including transportation, higher education, disaster management and more.

PROJECT EXPERIENCE

Project Manager, EBR Stormwater Master Plan, East Baton Rouge City Parish, Franklin Associates, LLC, 2020 - Present

- Created a public outreach strategy to disseminate information to stakeholders; developed and implemented project website; worked closely with program management team to align communications with program goals; coordinated public meetings in person and online.

Project Manager, MOVEBR, East Baton Rouge City Parish, Franklin Associates, LLC, 2019 - Present

- Created a public outreach strategy to disseminate scope of work for Public Information Coordination; worked closely with program management team to align communications regarding the city-parish's largest infrastructure program with program goals; facilitated/implemented key trainings for small business enabling higher participation in the program; coordinated public meetings in person and online. Coordinated information dissemination via web, social media, eblasts, direct mail, phone and in person.

Project Manager, KPMG/LSU Assessment, Franklin Associates, LLC, 2018 – 2019

- Developed communication's plan to engage roughly 500 stakeholders; researched best modes of communication to be utilized to reach the target population; created engagement plan to obtain data from stakeholders; coordinated and facilitated meetings between project leadership and other entities; developed methodology to quantified human capital data; assisted in the development of and refinement of visual graphics.

Program Coordinator, Louisiana Highway Safety Commission, 2017 – 2018

- Manage \$1M in National Highway Traffic Safety Administration (NHTSA) grants; research and implement effective traffic safety programs and countermeasures; serve as the liaison for the nine-statewide regional traffic safety coalitions; coordinate outreach efforts and engage new highway safety partners; develop highway safety policy initiatives and legislative agenda

EDUCATION

- In Progress, Ph.D. – Organizational Leadership, Regent University, Virginia Beach, VA
- Master of Arts – Ministry, 2016, Luther Rice College & Seminary, Lithonia, GA
- BA – Business Management, 2008, Southern University A&M College, Baton Rouge, LA

Johnathan Hill | Franklin Associates

Staffing Support Resource

items; ensure sub-grantees meet their programmatic goals and fiscal responsibilities; conduct program and fiscal auditing to ensure sub-grantees are in compliance with applicable regulations

Special Agent – Bureau of Investigation, Louisiana Department of Justice – Office of the Attorney General, 2011 – 2017

- Responsible for reviewing and investigating criminal fraud, and public corruption cases; supervised security detail officers; drafting detailed legal reports and review current laws and pending legislation; planned and participating in the execution of subpoenas in addition to high-risk search and arrest warrants; responsible for planning, security, and logistics for court proceedings and meetings.

Investigator, 19th Judicial District Law Office of the Public Defender, 2008 – 2011

- Investigated pending misdemeanor and felony criminal cases; interviewed clients and witnesses; drafted detailed reports for attorneys; reviewed and analyzed evidence and police reports; conducted legal research in preparation for court proceedings.

Executive Director, Young Emerging Leaders of Louisiana, Inc., 2005 - 2011

- Responsible for the development and implementation of the organization’s goals and objectives; rebuilt the organization from a dormant status; provided leadership, fiscal oversight and strategic direction for the organization; established relationships with stakeholders and other non-profits; secured external funding sources; exposed program participants to various professional fields; supervised the operations and personnel of the organization; compiled reports for board members and funding compliance.

EMPLOYMENT HISTORY

Franklin Associates, LLC	Advisory Services Practice Lead	2018-Present
LA Highway Safety Commission	Program Coordinator	2017-2018
LA Dept. of Justice Office of the Attorney General	Special Agent-Bureau of Investigator	2011-2017
Fairview Baptist Church	Assistant Pastor/Youth Ministry Leader	2017-Present
19th Judicial District Law Office of the Public Defender	Investigator	2008-2011
Young Emerging Leaders of Louisiana, Inc.	Executive Director	2005-2011
19th Judicial District Court	Criminal/Civil Clerk	2005-2008
Capitol High School	Director of Bands	2004-2005

EXPERIENCE OVERVIEW

Avery has over 20 years of Call Center Experience with 10 years in Call Center Management and Implementation. Currently he is Managing the Franklin Call Center overseeing full time Call Center Agents dedicated to the EBR Emergency Rental Assistance Program. Avery also has over 5 years of Disaster Case Management Experience working with the Federal Emergency Management Agency (FEMA) during the aftermath of Hurricanes Katrina, Rita, Wilma, Gustav and Ike. He also provided Case Management for Catholic Charities of the Diocese of Baton Rouge during the aftermath of the 2016 Floods. Avery has a track record of proven agent improvement, improving morale and resolving technical issues as they arise within his staff.

PROJECT EXPERIENCE

Project Manager/Call Center Manager, EBR Emergency Rental Program, Franklin Associates, 2021-Present

- Mr. Jack manages day to day call center operations for East Baton Rouge Emergency Rental Program with a full-time staff of call center agents. Created and developed call center procedure manual utilizing various systems to assist with training new call center agents.
- Researching and providing local resources for applicants upon. Assisting Community Partners and Case Managers with contacts to applicants and landlords with respect to case processing status and updates.

Project Manager/Call Center Manager, ARPA Call Center Project, Bonton Associates, Franklin Associates, May 2022-Present

- Assisted EBR Stormwater Repairs Project Manager regarding call trends. Monitor Zendesk Call Platform to ensure calls are being answered by available call center agents.

Customer Service Supervisor, Louisiana Healthcare Supervisor, Baton Rouge, LA, November 2018-March 2021

- Managed a staff of full time Member Service Representatives and Provider Service Representatives. Delivered daily call statistics to ensure staff understand their performance with respect to after call work, attendance, average hold time, and average handle time. Ensured processes are compliant with contractual agreements and State and Federal regulations, analyze and advise management of personnel, work-flow issues and trends and recommend resolutions.

EDUCATION

- BA, Mass Communications/Broadcast Journalism, Southern University, Baton Rouge, LA, 1995
- Post Graduate Studies, Business Management and Finance, Southern University, 2005-2007

Avery Jack | Franklin Associates

Staffing Support Resource

Disaster Case Manager, Catholic Charities of the Diocese of Baton Rouge, Baton Rouge, LA, October 2016-November 2018

- Assisted 36 clients with resources and referral information in the wake of the 2016 Flood of Baton Rouge. Collected information from clients to provide, develop, and complete a recovery plan(s) to assist clients to gathering resources needed to complete their home repairs. Communicated with clients any updates to referrals and resources available to them via telephone and e-mail. Contacted clients to schedule and conduct in-home visits to compile information needed to update their case files using CAN (Coordinated Assistance Network) and in the paper files

Contact Center Manager, Louisiana Department of Education, Baton Rouge, LA, February 2016-April 2016

- Conducted quality assurance and call calibration sessions with inbound call center staff and email responses staff who returned phone calls to clients on the Child Care Assistance Program.

EMPLOYMENT HISTORY

Franklin Associates, LLC	Project Manager/Call Center Manager	2021-Present
Louisiana Healthcare Supervisor	Customer Service Supervisor	2018-2021
Catholic Charities of the Diocese of Baton Rouge	Disaster Case Manager	2016-2018
Louisiana Department of Education	Contact Center Manager	2016

EXPERIENCE OVERVIEW:

Shawna McElfish has 6 years of grant administration and project management experience. She joined GrantWorks in October 2019 as an Application Specialist and has quickly moved up the ranks. As the Director of Application Services, Shawna is responsible for gathering data, monitoring the progress of deadlines, and overseeing the preparation of application materials. She coordinates with municipalities, chambers of commerce, local businesses, economic development corporations, and other local entities to develop and write grants for community and economic development projects.

PROJECT EXPERIENCE:

Grant Writer/Director of Application Services, GrantWorks, Whitehouse, Texas, October 2019 - Present

- Work with cities and counties to prepare grant applications according to all program requirements
- Provides general advice and technical assistance so clients select the most fundable project
- Researches grant opportunities from federal and state government agencies
- Drafts grant proposals and supporting documents based on the funding requirement
- Responds to internal and external queries on drafted and submitted proposals.
- Maintains positive relationships with grant agencies and other stakeholders
- Maintains records and submit reports related to grant opportunities
- Completes and submits applications on or before the deadline to the proper funding program
- Specializes in grant applications for multiple grant funds

Project Manager, Traylor & Associates, Inc., Tyler, Texas, July 2012 – July 2016

- Maintained close contact and communication with City/County staff, engineers, architects, and construction contractors
- Communicated with state agencies

EDUCATION:

- Coursework, Southwestern Adventist University, Keene, Texas, 1996 – 1997

CERTIFICATIONS & TRAININGS

- TxCDBG Certified Administrator, Texas Department of Agriculture, 2022

Shawna McElfish | GrantWorks, Inc.

Staffing Support Resource

Project Manager, Traylor & Associates, Inc., Tyler, Texas, July 2012 – July 2016 (Continued)

- Ensured compliance with state and federal laws concerning all aspects of grants
- Held public hearings and attended Council meetings
- Wrote and edited grant applications for cities and counties, prepared Environmental Review records, and managed all grants, including financial management
- Prepared monthly billing on over 40 grants, including data entry, and labor standards compliance

EMPLOYMENT HISTORY:

2019 - Present		GrantWorks, Inc., Whitehouse, Texas Grant Writer and Director of Application Services
2016 - 2019		Grand Openings, Tyler, Texas Hardware Specialist
2012 - 2016		Traylor & Associates, Inc., Tyler, Texas Project Manager
2005 - 2011		Floormax of Tyler, Tyler, Texas Office Manager & Floorcovering Sales
2004 - 2005		Lanes Chapel UMC, Tyler, Texas Nursery Coordinator
2000 - 2001		Moroch & Associates, Inc., Dallas, Texas Media Accountant

EXPERIENCE OVERVIEW

Andrew Santee has directed multiple public engagement projects for the Louisiana Department of Transportation, East Baton Rouge Parish, and the Community Foundation of Southwest Louisiana. He has experience working on federally funded grant programs including HUD CDBG-DR Hurricane Ida recovery for the Louisiana Housing Corporation as well as ARPA funding for East Baton Rouge where he helped clients implement and develop training materials for their use of SLFRF. A recently transitioned veteran, he served as an Armor Officer for seven years before being discharged as a Captain.

PROJECT EXPERIENCE

Project Manager, LA 1 TO LA 415 Connector, LADOTD, Franklin Associates, 2022

- Created and execute a community engagement strategy to disseminate information to the public. Developed materials to be distributed to the public. Worked closely with project team to align communications with project goals. Coordinated and oversaw public meeting to distribute information to stakeholders and public. Disseminated information via eblasts, email, and face to face conversation.

Project Manager, EBR Stormwater Repairs, East Baton Rouge City Parish, Franklin Associates, 2022

- Created and execute a community engagement strategy to disseminate information to the public. Developed materials to be distributed to the public. Worked closely with project team to align communications with project goals. Coordinated and oversaw public meeting to distribute information to stakeholders and public. Disseminated information via eblasts, email, and face-to-face conversation.

Project Manager, Just Imagine SWLA, Community Foundation Southwest Louisiana, Franklin Associates, 2021-2022

- Implemented a public outreach strategy for a regional resilience master plan; disseminated and gathered information from community. Led an ambassador program that helped to collect feedback from the public, and created surveys used to gain community input; analyzed and presented information to help in decision-making. Coordinated nine public meetings across Southwest Louisiana. Promoted meeting attendance and project participation through eblasts, social media, and grassroots efforts.

EDUCATION

- MBA, Kelley Direct Online Program, Indiana University, Expected Graduation February 2023
- MS, Marketing, Kelley Direct Online Program, Indiana University, Expected Graduation August 2023
- BS, History with Thesis, Environmental Engineering Track, United States Military Academy at West Point, 2012

Andrew Santee | Franklin Associates

Staffing Support Resource

Project Coordinator, Various Projects, Franklin Associates, 2021

- Assisted in implementing public outreach strategy for projects including the MOVEBR, EBR Stormwater Master Plan, the I-10 Widening Project, and the Bell Chasse Bridge and Tunnel Replacement Project. Assisted in coordinating and executing public meetings throughout Baton Rouge and South Louisiana. Compiled reports on public commenting and meeting attendance. Developed social media content.

Battalion Planner, United States Army, 2017-2019

- Led a planning cell of four managers to coordinate operations and training for 519 soldiers in Korea. Developed and issued a movement plan for 519 soldiers and over 100 military vehicles by air, rail, and ground in a foreign country; resulted in all equipment and personnel arriving safely at destination on schedule. Chosen to lead an advance deployment party; managed a cross-functional team of twelve officers with minimal supervision to prepare for the battalion's deployment. Planned numerous large-scale operations, including exercises with multiple external units and agencies. Implemented systems to drive timely planning and ensure cross-coordination with all the battalion's departments. Mentored junior officers, ultimately resulting in a seamless transition with replacement upon leaving the position.

Battalion Adjutant, United States Army, 2016-2017

- Executive Assistant to the general manager of a battalion comprised of 700 soldiers. Supervised the safe and timely movement of over 400 armored vehicles and shipping containers for rail transportation. Managed five funds valued at \$14,000; developed standard operating procedures for the operation and auditing of all funds. Coordinated, resourced, and drove a family readiness program; facilitated multiple town hall meetings and large family events.

Assistant Battalion Planner, United States Army, 2015-2016

- Developed the annual training plan for 797 soldiers; planned, coordinated, and resourced eleven large scale exercises in Korea. Oversaw the intermodal shipment of sensitive equipment and personal effects for six companies between the US and Korea. Awarded the Army Commendation Medal for excellence and rated in the top third of peers.

EMPLOYMENT HISTORY

Franklin Associates, LLC	Project Manager	2022
Franklin Associates, LLC	Project Coordinator	2021
United States Army	Armor Officer	2012-2019

EXPERIENCE OVERVIEW:

Vallorie Young executes reviews of applications and budgets, prepares reports for grantees, maintains project development files, ensures adherence to grant agreements, manages subrecipients via monthly program calls for status updates, and works to facilitate timely acquisition and development of CDBG-DR grant-funded affordable housing.

PROJECT EXPERIENCE:

Grant Manager, Hurricane Harvey CDBG-DR Program Management Support Services, Single-Family, New Construction, and New Development Programs, Texas General Land Office, City of Houston and Harris County, Texas, August 2019 - Present

- Administers the development of new construction affordable housing for LMI homebuyers within the City of Houston and Harris County
- Holds contractors to a tight schedule regarding planning, implementation, and construction activities
- Closely monitors project schedules, maintaining constant contact with developers regarding project milestones
- Ensures the LMI population is adequately serviced per HUD regulations.
- Employs methodologies in line with program policy and remains focused on the end goal of affordable housing
- All approved projects remain on schedule, and many are entering the construction phase.

Grant Manager, Hurricane Harvey CDBG-DR Program Management Support Services, Single-Family, New

Senior Program Manager, Louisiana Redevelopment Authority, Baton Rouge, Louisiana, February 2019 – July 2021

- Prepared and monitored CPD grant subrecipient, agreements, budgets, expenditures, and compliance with HUD and City-Parish
- Prepared and monitored environmental review requests for CDBG and HOME projects, respectively
- Requested and monitored the progress of home inspections and led inspections
- Collected documents and verified program eligibility for the City-Parish Housing Rehabilitation program
- Conducted desktop and on-site monitoring of grant sub-recipients to ensure compliance with federal regulations and documents, such as compliance

EDUCATION:

- Bachelor of Arts, Sociology, Louisiana State University, Baton Rouge, Louisiana, May 2005

Vallorie Young | GrantWorks, Inc.

Staffing Support Resource

Senior Program Manager, Louisiana Redevelopment Authority, Baton Rouge, Louisiana, February 2019 – July 2021

- Reviewed draw requests subrecipients, community partners, and developers to ensure eligibility as defined by funding source and consistency with program budgets before submission to Grants Fiscal Manager for submission for payment
- Assisted in the preparation, distribution, and collection of requests for funding for various CPD grants
- Assisted with reviewing, scoring, and ranking CPD requests for funding
- Coordinated with City-Parish loan servicing provider regarding various CPD development and homebuyer loans
- Setup project activities in HUD's Integrated Disbursement and Information System (IDIS)
- Collected, compiled, and provided data entry for projects at the point of closeout in IDIS
- Assisted the Grants Fiscal Manager with review and input of draw requests in the City-Parish financial payment system, MUNIS
- Assisted in developing Strategic, Annual Action and Comprehensive Housing and HUD Consolidated Plans
- Served as point of contact for assigned projects
- Assisted with planning and coordination of community meetings of various sizes to disseminate information and gather feedback about community needs
- Compiled and prepared the weekly report to be submitted to Grants Director for assigned CPD program detailing projects statics for each assigned program

Closeout Specialist, Louisiana Governor's Office of Homeland Security and Emergency Preparedness, Baton Rouge, Louisiana, November 2014 – November 2017

- Ensured closeout processes satisfied Federal Program requirements
- Provided monthly reports of closeout activities
- Ensured project cost reconciliation with the final project budget
- Prepared documentation to request de-obligation of excess funds
- Ensured amendments to the project are in line with the scope of work
- Conducted property site inspections to validate mitigation measure
- Input information into the closeout database

EMPLOYMENT HISTORY:

2021 - Present		GrantWorks, Inc., Baton Rouge, Louisiana Grant Manager
2019 - 2021		Louisiana Redevelopment Authority, Baton Rouge, Louisiana Senior Program Manager
2014 - 2017		Louisiana Governor's Office of Homeland Security and Emergency Preparedness, Baton Rouge, Louisiana Closeout Specialist
2013 - 2014		Adjusters International, Baton Rouge, Louisiana Analyst

TAB 2 - Hourly Rate Table

Proposer Name: Franklin Associates, LLC

STAFFING AREAS – AREA/POSITIONS	NUMBER OF STAFF AVAILABLE	HOURLY RATE CHARGED	HOURLY RATE PAID
(AREA)	(INFORMATIONAL)	(TO STATE)	(TO STAFF)
<u>Area 1</u> Pursuing IJJA Grant Funding – TASK LEAD	2	\$190	\$76
<u>Area 1</u> Pursuing IJJA Grant Funding – GRANT WRITER	10	\$155	\$62
<u>Area 1</u> Pursuing IJJA Grant Funding – GRANT WRITER	10	\$145	\$58
<u>Area 2</u> Managing Successful IJJA ACT Grant Applications – TASK LEAD	2	\$190	\$76
<u>Area 2</u> Managing Successful IJJA ACT Grant Applications – GRANT MANAGER	10	\$165	\$66
<u>Area 2</u> Managing Successful IJJA ACT Grant Applications – GRANT ANALYST	10	\$150	\$60
<u>Area 3</u> Project Management – PROJECT MANAGER (Non-Principal)	2	\$190	76
<u>Area 3</u> Project Management – PROJECT ANALYST	10	\$145	58
<u>Area 3</u> Project Management – MANAGER-PRINCIPAL (OWNER)	1	\$255	<i>Same as Charged</i>
<u>Area 4</u> Enhanced Project Management – ENGINEER/ARCHITECT	Not applicable	Not applicable	<i>Same as Charged</i>
<u>Area 4</u> Enhanced Project Management – OTHER LICENSED DESIGN PROFESSIONALS or CERTIFIED PROFESSIONALS	Not applicable	Not applicable	Same as Charged

Submitted December 23, 2022 - Information subject to the restrictions outlined on page 1 of this proposal



**TECHNICAL ASSISTANCE PROGRAM:
TECHNICAL PROPOSAL + RATE SHEET
HUNT, GUILLOT & ASSOCIATES**

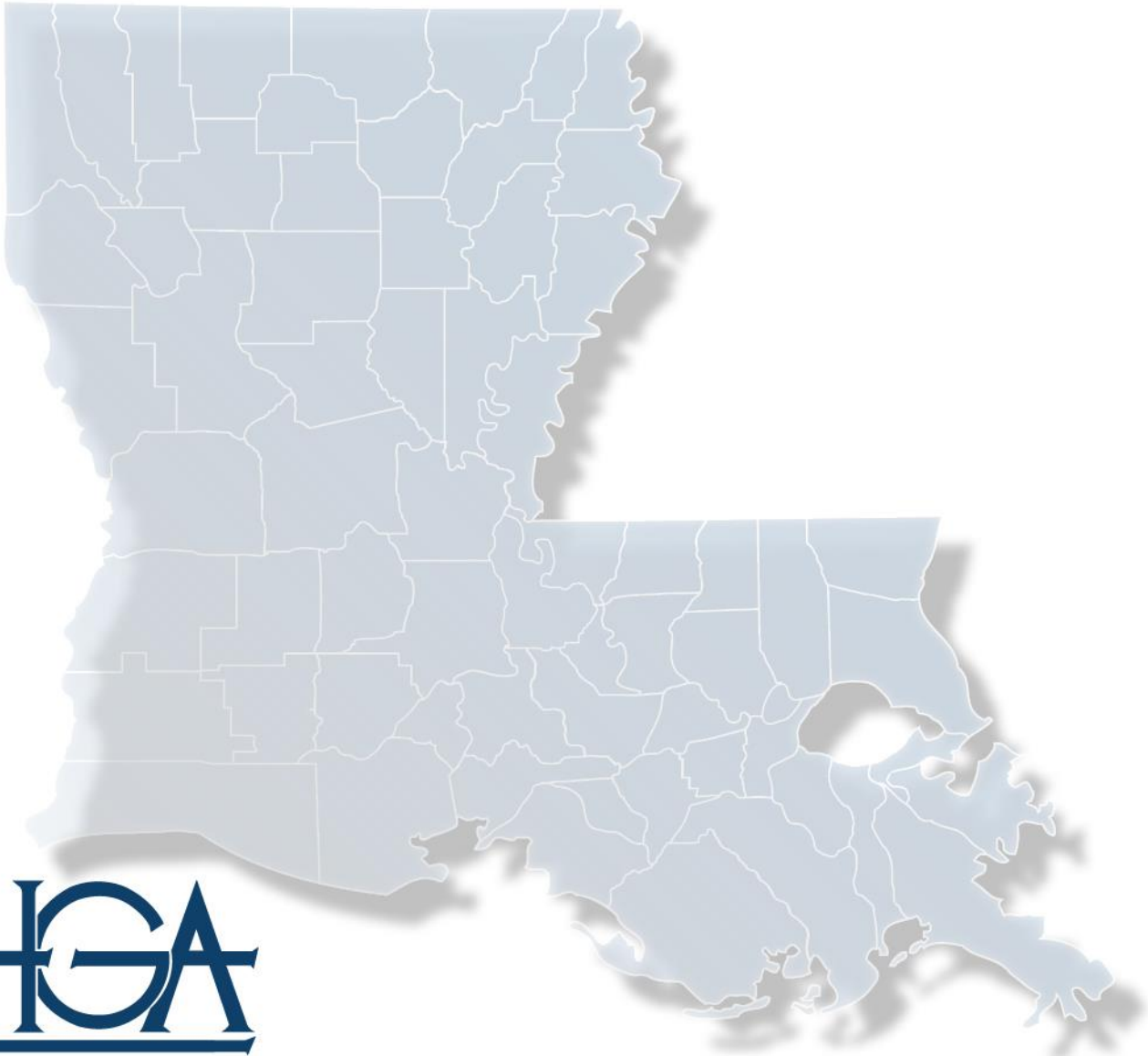
LITACorp Grant Application & Administration Staffing Support

DECEMBER 23, 2022 | LITACORP 01-2022

TECHNICAL PROPOSAL

A PROPOSAL TO

Louisiana Infrastructure Technical Assistance Corporation (**LITACorp**)



Grant Application and Grant Administrative Support Services

A Proposal to the Louisiana Infrastructure Technical Assistance Corporation
(LITACorp)

Technical Proposal

Staffing Support Areas Proposed:

Area 1: Pursuing IIJA Grant Funding

Area 2: Managing Successful IIJA Grant Applications

Area 3: Project Management

Area 4: Professional Technical Support

Due Date: December 23, 2022

Proposal #P.522711.00.0



9357 Interline Ave.

Baton Rouge, LA 70809

www.hga-llc.com



COVER LETTER

December 23, 2022

Leslie Anne Durham, Executive Director
LITACorp
707 N Seventh St.
Baton Rouge, LA 70802

Subject: LITACorp Grant Application & Administration Staffing Support; LITACorp 01-2022
HGA Proposal No. P.522711.00.0

Dear Ms. Durham:

This letter serves to express HGA's intent to bid on the above-referenced contract to provide support to the Louisiana Infrastructure Technical Assistance Corporation (LITACorp) for grant application and grant administrative support services for the federal Infrastructure Investment and Jobs Act (IIJA). The HGA Team is both willing and more than able to perform the required services and enter into a contract with LITACorp. Our proposal addresses all four Staffing Support Areas listed in the RFP. We acknowledge receipt of RFP Addenda #1, #2, and #3.

The HGA Team has the capacity to perform all work described in the Scope of Work/Services (SOW), Section 2.1 of the RFP. Our Team includes Hunt, Guillot, and Associates, LLC (HGA), a prime contractor with significant experience in application development and grant administrative services and experience with IIJA grant funding, and subcontractors Pan American Engineers (PAE), Quality Engineering & Surveying, LLC, (QES) and GIS Engineering (GIS). This Team includes all Louisiana-based firms that have supported previous local grant application and management efforts in various capacities, including staffing support.

HGA is well prepared to lead our team in building capacity within the Louisiana Political Subdivisions the Corporation serves through staffing services and technical assistance:

- We have provided staffing support services for government clients in Louisiana, New York, and North Carolina.

- HGA has completed over 750 applications worth more than \$2 billion in funding for over 600 applicants.
- HGA has a proven track record of successfully supporting over \$20 billion in grant management services for state and local clients to include infrastructure, economic, and housing projects.
- The HGA Team has supported clients such as the Greater Lafourche Port Commission, East Baton Rouge Parish, the City of Lake Charles, and the Towns of Abita Springs and Golden Meadow with their IJA applications and funding administration.
- The HGA Team is experienced in rapid ramp-up of projects and has the ability to recruit and train large numbers of staff in a short period.

While maintaining federal statutory compliance for each project may seem daunting to local governments, HGA Team staff will focus on thoroughly explaining the basics of IJA compliance and reporting requirements up front. By working directly with the local government LITACorp clients and providing educational resources and technical assistance, the HGA Team will contribute to the goal of increasing individual, organizational, and public institutional capacity for project identification, project formation, project implementation, and long-term operations and maintenance.

Thank you for the opportunity to provide this proposal. As an HGA Principal, I am authorized to contractually obligate the firm via my signature below. We have provided our Board Resolution confirming this authority on the following pages. I will also serve as the primary point of contact and responsible officer for technical and contractual issues regarding this proposal. If you have any questions, please don't hesitate to contact me at (225) 927-6825.

Sincerely,



Jack Hunt, HGA Principal

9357 Interline Avenue, Baton Rouge, LA 70809

Phone: (225) 927-6825; Fax: (225) 529-3778

E-mail: jhunt@hga-llc.com

HGA federal tax identification number: 72-1354146

**Consent Resolution of Managers of
HUNT, GUILLOT & ASSOCIATES, L.L.C.**

February 21, 2019

The undersigned, being all of the Managers of Hunt, Guillot & Associates, L.L.C. (the "Company"), a Louisiana limited liability company, do hereby consent to the following resolutions:

WHEREAS, pursuant to Section 4.1 of the Operating Agreement of the Company, as amended and/or restated (the "Agreement"), the Managers are authorized to execute documents, proposals and contracts on behalf of the Company;

WHEREAS, pursuant to Section 4.2 of the Agreement, Alex T. Hunt III, John A. Guillot and Donald W. Plummer are all of the Managers of the Company;

WHEREAS, pursuant to Section 4.4 of the Agreement, the Managers may appoint one or more Authorized Persons to act on behalf of the Company and execute documents, proposals and contracts on behalf of the Company; and

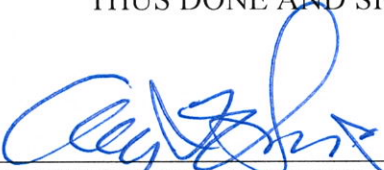
WHEREAS, the Managers desire to appoint Alexander T. Hunt, IV and Jack Hunt as authorized person(s) to act on behalf of the Company and execute documents, proposals and contracts on behalf of the Company.

NOW, THEREFORE, BE IT RESOLVED that each of the following person(s) is appointed as Authorized Person to act on behalf of the Company and execute contracts on behalf of the Company:

Alexander T. Hunt, IV
Jack M. Hunt

FURTHER RESOLVED, that each Authorized Person, independently of each other and without further resolution of the Managers, shall have the authority to act on behalf of and bind the Company to any and all documents, proposals or contracts.

THUS DONE AND SIGNED, on the date first written above.



ALEXANDER T. HUNT III, Manager



JOHN A. GUILLOT, Manager



DONALD W. PLUMMER, Manager

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TAB 1 – EXECUTIVE SUMMARY

This proposal will describe the HGA Team’s experience and qualifications to provide services for all of the RFP Staffing Support Areas with a focus on our history of providing staffing services. We will also describe our approach and methodology for identifying, recruiting, training, and retaining staffing resources.

The HGA Team has experience preparing IJA applications; existing relationships with local governments across the State; an existing cadre of qualified, available staff with systems in place to quickly recruit and train more staff as needed; and a history of providing staffing support services and technical assistance to public entities. Our team is comprised of Louisiana-based firms dedicated to leveraging federal funding to benefit communities across our State.



TAB 2 – PROPOSER AND SUBCONTRACTORS CORPORATE INFORMATION

Company Overview

HGA Company Information

Year of Founding: 1997
 Current Size of Staff: 500
 Latest Annual Revenue: See separately submitted financials
 Corporate Profit: See separately submitted financials
 Sales Growth: See separately submitted financials
 Principal Owners: Trott Hunt, Jay Guillot, Trotter Hunt, Jack Hunt
 Areas of Focus: Program Management (Grant Services), Staffing, Engineering, Integrated Services, and Construction
 Levels of Government Served: State, County/Parish, and City/Community
 Location of Headquarters: Ruston, LA
 Location of Nearest Office: Baton Rouge, LA

Hunt, Guillot and Associates LLC (HGA) is a Limited Liability Company that was formed in 1997 and, over the past 25 years, has grown into a top-ranked program management and engineering firm with a staff of more than 500 employees in nine offices across the country, with four of those offices being located in Louisiana. HGA has operated under the same private ownership structure since its founding, with no planned changes. The company has several divisions that include Program Management, Staffing, Engineering, Integrated Services, and Construction. We maintain a staff of Certified Project Managers, Grant Administrators, Geographic Information Systems (GIS)

Specialists, Professional Engineers, and Construction Managers.

HGA has a proven track record of successfully supporting over \$24 billion in grant-funded programs for state and local clients to include economic, infrastructure, and housing projects. This work includes providing grant management services in 41 parishes in Louisiana. We have a perfect record of zero funds being recaptured over the multiple billions of dollars

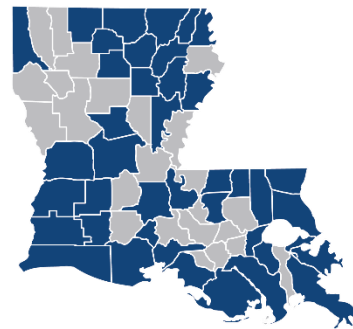


FIGURE 1: HGA LOUISIANA EXPERIENCE. *HGA has been providing the State of Louisiana with grant management services since 2007, serving in 41 parishes.*

under our management. Our services have included comprehensive program management and grant services from action plan development to program closeout.

Our staff has provided program and grant management services involving multiple federal funding streams, such as FEMA’s Public Assistance (PA) and Hazard Mitigation Assistance (HMA) programs; HUD’s Community Development Block Grant (CDBG) Disaster Recovery and Mitigation programs; and newer federal grant programs through the American Rescue Plan Act (ARPA) and the Infrastructure Investment and Jobs Act (IIJA), also known as the Bipartisan Infrastructure Law.

Financial Strength

HGA maintains the financial resources and stability needed to perform on this contract. These resources include a Line of Credit with Origin Bank and minimal debt obligations.

HGA is significantly more stable than many program management companies because we have multiple business lines, including engineering and pipeline services, which translates into multiple income streams. This diversity of income sources protects the company from business fluctuations in any one area, and allows HGA to cover the cost of expenses without depending on the status of any one project. This arrangement was put to the ultimate test during the height of the COVID-19 pandemic, when several of HGA’s business lines experienced a downturn due to the lockdown. Our other lines of business helped to keep the company stable until business returned to normal across the board.

Integrity

HGA and our staff are of high integrity and operate in a culture of high integrity. At HGA, we seek to build long-term customer relationships by listening to our clients, leveraging our experience and delivering on our commitments. We believe in leading by example, maintaining an open and



FIGURE 2: LONG RELATIONSHIPS WITH CLIENTS. *HGA's success shows in its longstanding contractual relationships, as the same agencies contract us repeatedly to continue supporting them.*

honest dialogue, and honoring all client commitments. Simply stated, we will be your valued and trusted advocate. Client satisfaction is our top priority. We strive to perform above our client expectations and to deliver all projects on schedule and on budget. Clients come to HGA for our expertise, proven project management processes and reporting, responsiveness, and cost-effectiveness—and return to HGA for the same reasons.

Statements

The HGA Team does not anticipate any potential conflicts of interest related to this bid.

Neither HGA, nor its subcontractors, has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, in the last ten years.

Likewise, neither HGA, nor its subcontractors have undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors.

Proposer Experience

Commitment to RFP Framework

The HGA Team is committed to the framework outlined in the RFP and will ensure compliance with all IIJA processes. HGA has provided staffing support to multiple government clients and understands the need to be flexible when ramping up and ramping down.

Summary of Experience

The HGA Team has supported clients such as the Greater Lafourche Port Commission, East Baton Rouge Parish, the City of Lake Charles, and the Towns of Abita Springs and Golden Meadow with their IIJA applications and funding administration. In fact, HGA has developed innovative ways to present data to the federal government for approval of IIJA applications. For the City of Lake Charles and Town of Abita Springs infrastructure grant programs, HGA's interdisciplinary team of GIS Specialists, Grant Managers, and Project Managers created story maps:

- <https://storymaps.arcgis.com/stories/abe36e1826a6431d9fad27e75359f517>
- <https://storymaps.arcgis.com/stories/cde2eef9f75448bea0bfa99334760eb2>

These story maps provided data in support of the entities' Safe Streets for All projects to include traffic accident data, LMI access, locations with direct safety and equity concerns, and the volume of pedestrians and cyclists sharing the roads.

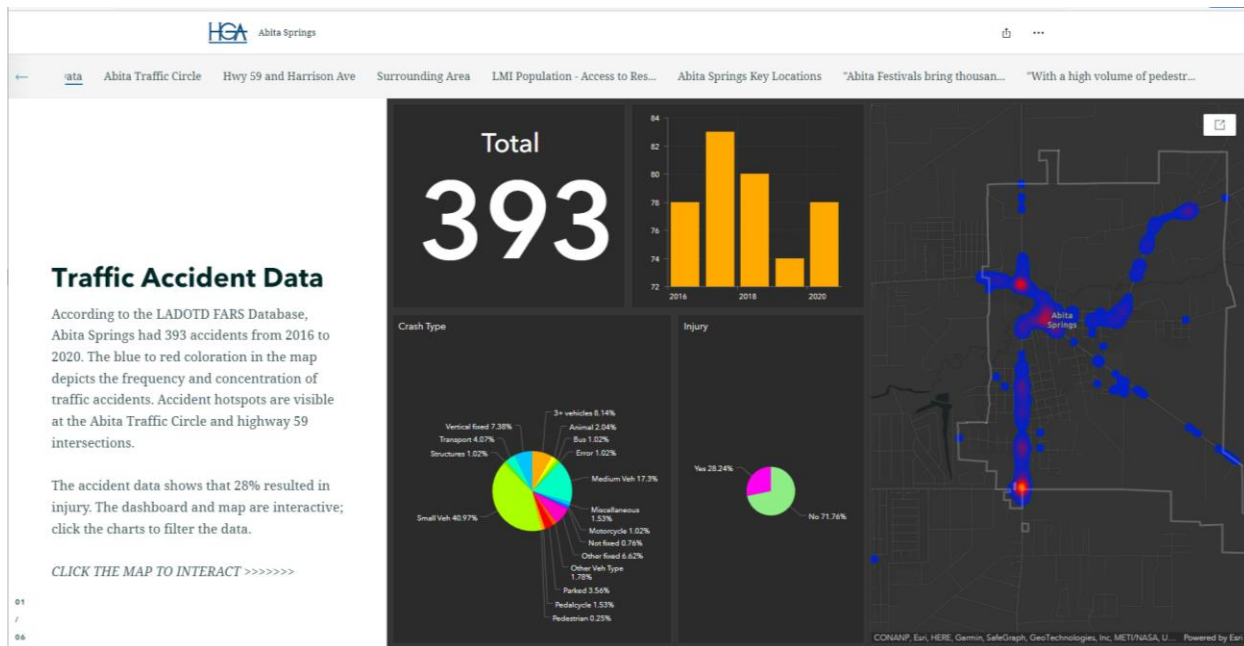


FIGURE 3: IJJA APPLICATION SUPPORTING INFORMATION. HGA created an online story map in support of the Town of Abita Springs's application.

HGA understand how to identify, verify eligibility, and implement infrastructure project in compliance with the grant funding source. We have proven this by **leading the two largest infrastructure recovery programs** that have been implemented to date—New York's for Hurricane Sandy and Louisiana's for Hurricanes Katrina and Rita. Both of which have received **no HUD findings nor faced any recapture.**

HGA regularly provides staffing and technical support to clients. Under the HUD Community Compass program, HGA has also provided technical assistance and training to state and local governments in the U.S. Virgin Islands, Puerto Rico, New York, North Carolina, South Carolina, Alaska, West Virginia, and Louisiana. **We work to build capacity and increase production levels in government agencies, so they are better prepared for future disasters and grant programs.**



Technical Assistance and Training Success Story

HGA has provided an array of technical assistance on topics similar to those requested in the RFP to the New York Governor’s Office of Storm Recovery (GOSR) and its subrecipients. Examples of the **formal training** include the **technical assistance modules** used to train subrecipients to be CDBG-DR compliant when handling HUD grant money, and to remain in compliance with GOSR policies as well. HGA has regularly performed **informal training** with GOSR project leads and senior staff through direct one-on-one consultation and working meetings. Finally, HGA has also performed **hybrid training sessions**, such as the Grant Administrator training, which includes a formal component, complete with materials and examples for the Grant Administrators to work through, followed up by **supervised on-the-job training** where they receive regular feedback and support from senior HGA staff. The training provided by HGA has helped to build capacity for GOSR staff and thus to **reduce program costs**.

The following tables provide details for relevant engagements to include the grant program involved, number of staff provided, type of government agency, grant size, and duration of engagement.

NCORR Housing and Infrastructure Staff Augmentation

Staffing Support Area Relevance:	Areas 2, 3, 4
Prime or Subcontractor:	HGA is the prime contractor.
Customer:	North Carolina Office of Recovery and Resiliency (NCORR)
Customer Type:	State government
Project Name:	Housing and Infrastructure Staff Augmentation
Grant Program:	HUD CDBG-DR and CDBG-MIT
Number of Staff Provided:	43
Type of Government Agency:	State
Program value (Grant Size):	\$740 million CDBG-DR and \$168 million CDBG-MIT
Duration of Engagement:	June 2019–present
Staffing Support Services Provided:	HGA has been providing NCORR with expert staff to support planning, operations, and compliance for all of its recovery programs. More specifically, HGA has helped NCORR to develop program policies and procedures that will help NCORR to remain compliant in all federal cross-cutting statutes. HGA will also help NCORR to implement other industry-wide best practices to ensure overall grant compliance.

Customer Reference	<p>Matt Arlyn, Planning and Policy Director NCORR 512 N. Salisbury St. Raleigh, NC 27604 (984) 232-3234 Matthew.Arlyn@ncdps.gov</p>
---------------------------	--

NCORR Staff Augmentation For HOPE Program

Staffing Support Area Relevance	Areas 2, 3, 4
Prime or Subcontractor	HGA was the prime contractor.
Customer:	North Carolina Office of Recovery and Resiliency (NCORR)
Project Name:	Staff Augmentation for Housing Opportunities and Prevention of Evictions (HOPE) Program Case Management
Grant Program:	Community Development Block Grant- Coronavirus (CDBG-CV) and Covid Relief Funds (CRF)
Number of Staff Provided:	70
Type of Government Agency:	State
Program Value (Grant Size):	\$167 million
Duration of Engagement:	November 2020–December 2022
Staffing Support Services Provided:	HGA was selected to provide Subject Matter Experts and Case Managers to directly support NCORR Planning and Policy senior staff in the administration of this program for at-risk households. Other tasks included supervising the workload of 11 HOPE Supervisors and 125 Specialists responsible for the review of 56,675 applications for assistance. 41,500 of these applications were deemed eligible for assistance. HGA also supported the implementation of the program by internal and external staff, with applicant awards totaling more than \$133 million.
Customer Reference:	<p>Matt Arlyn, Planning and Policy Director NCORR 512 N. Salisbury St. Raleigh, NC 27604 (984) 232-3234 Matthew.Arlyn@ncdps.gov</p>

NY GOSR Hurricane Sandy Infrastructure Recovery Program Management

Staffing Support Area Relevance:	Areas 1, 2, 3, 4
Prime or Subcontractor:	HGA was the prime contractor.
Customer:	New York Governor's Office of Storm Recovery (GOSR)
Project Name:	Hurricane Sandy Infrastructure Recovery Program Management
Grant Program:	CDBG-DR
Number of Staff Provided:	35
Type of Government Agency:	State
Program value (Grant Size):	\$1.3 billion
Duration of Engagement:	May 2014–present
Staffing Support Services Provided:	HGA is serving as the GOSR CDBG-DR Infrastructure Program Manager for Hurricane Sandy recovery. The scope of work includes managing the \$1.3 billion allocated to four programs. HGA embedded our staff across three State offices in New York and developed trusted working relationships with GOSR and program subrecipients by working with them daily to provide technical assistance and training. We reviewed and vetted over 500 potential projects for national objective, eligibility, and beneficiary determination to develop approximately 325 project applications for CDBG-DR funding. We worked with GOSR, subrecipients, architects/ engineers (A/Es), and state agencies to accomplish this task.
Customer Reference:	Natalie Wright, former Deputy Executive Director for Community Reconstruction, Infrastructure, and Small Business, NY GOSR (612) 868-4186 wright.2.natalie@gmail.com

LA OCD Hurricanes Katrina & Rita Infrastructure Recovery Program Management

Staffing Support Area Relevance:	Areas 2, 3, 4
Prime or Subcontractor:	HGA was the prime contractor and PAE was a subcontractor and then PAE became the prime and HGA was a subcontractor to PAE
Customer:	Louisiana Office of Community Development
Project Name:	Hurricanes Katrina & Rita Infrastructure Recovery Program Management
Grant Program:	CDBG-DR

Number of Staff Provided:	40
Type of Government Agency:	State
Program value (Grant Size):	\$1.4 billion
Duration of Engagement:	October 2007–May 2021
Staffing Support Service Provided:	HGA and PAE developed program policies and procedures and an implementation plan for successful program delivery. We managed 357 concurrent projects for the State of Louisiana in 23 parishes, 16 school boards, local non-profits, and fishery enterprises. HGA also provided labor compliance monitoring services for the Katrina/Rita infrastructure projects and the piggyback multifamily housing complexes.
Customer Reference	Pat Forbes, Executive Director LA OCD-DRU P.O. Box 94095 Baton Rouge, LA 70804-9095 (225) 219-9600 Patrick.forbes@la.gov

LA GOHSEP Subrecipient Technical Assistance

Staffing Support Area Relevance:	Areas 1, 2, 3, 4
Prime or Subcontractor:	HGA was the prime contractor.
Customer:	Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP)
Project Name:	Subrecipient Technical Assistance
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	10
Type of Government Agency:	State
Program value (Grant Size):	\$381 million
Duration of Engagement:	August 2021–present
Staffing Support Services Provided:	HGA is providing statewide HMGP technical assistance to eligible subrecipients affected by disasters, including Hurricanes Laura, Delta, Zeta, and Ida, and the Winter Storm and May Flood of 2021. We are providing subrecipients in 24 parishes assistance with all administrative, oversight, project development, reimbursement, and closeout activities and potentially future grant programs.
Customer Reference:	Sean Wyatt, Assistant Deputy Director Hazard Mitigation Assistance Program GOHSEP 7667 Independence Blvd.

Baton Rouge, LA 70806
 (225) 389-2403
 Sean.Wyatt@la.gov

St. Mary Parish FEMA HMA Program Management

Staffing Support Area Relevance	Area 1
Prime or Subcontractor	QES was the prime contractor.
Customer:	St. Mary Parish Government
Project Name:	FEMA HMA Program Management for FY 2020
Grant Program:	FEMA Hazard Mitigation Assistance (HMA) Flood Mitigation Assistance (FMA)
Number of Staff Provided:	3
Type of Government Agency:	Parish
Program Value (Grant Size):	\$874,780
Duration of Engagement:	2019–est. August 2025
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ FMA Grant Writing ▪ FMA Project Management ▪ Application Development ▪ Benefit Cost Analysis <p>Quality successfully submitted a grant application for five properties with a total project cost of \$874,780 in mitigation funding for elevation mitigation activities. The five properties from this application have been selected for further review by FEMA and are currently being reviewed.</p>
Customer Reference:	<p>Henry “Bo” Legrange St. Mary Parish Government 500 Main St. Franklin, LA 70538 (337) 828-4100 H.Lagrange@StMaryParishLA.gov</p>

Tangipahoa Parish HMGP Acquisitions

Staffing Support Area Relevance	Area 2
Prime or Subcontractor	QES was the prime contractor.
Customer:	Tangipahoa Parish Government

Project Name:	Tangipahoa Parish HMGP Acquisitions
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	3
Type of Government Agency:	Parish
Program Value (Grant Size):	\$66,500
Duration of Engagement:	June 2016–est. 2023
Staffing Support Services Provided:	QES represented Tangipahoa Parish Government in the DR-1792 project, Tangipahoa Parish Acquisitions. The scope of work included homeowner outreach and education, procurement of asbestos services, title services, and demolition, official closing and demolition of each structure, and closeout to GOHSEP and FEMA for the project grant. Additionally, Tangipahoa Parish received an added allocation to acquire other Repetitive Loss (RL) and Severe Repetitive Loss (SRL) structures. QES provided education and outreach to those properties deemed RL/SRL and a priority for the Parish, and completed the acquisition project.
Customer Reference:	Robby Miller Tangipahoa Parish Government P.O. Box 215 Amite, LA 70422 (225) 635-3861 ParishPres@Tangipahoa.org

Tangipahoa Parish Hurricane Isaac HMGP Project Management

Staffing Support Area Relevance	Area 2
Prime or Subcontractor	QES was the prime contractor.
Customer:	Tangipahoa Parish Government
Project Name:	Tangipahoa Parish Hurricane Isaac HMGP Project Management
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	3
Type of Government Agency:	Parish
Program Value (Grant Size):	\$1,200,000
Duration of Engagement:	September 2014–September 2019
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ HMGP Project Management ▪ Benefit-Cost Analysis ▪ Acquisitions and Elevations of RL/SRL structures ▪ Project Closeout

	<p>QES was procured by the Tangipahoa Parish Government to help reduce or eliminate future damages and NFIP claims in accordance with rules and regulations set forth by FEMA and local ordinance. QES ensured that each structure met the requirements of the standards set forth by ASCE 24. QES supported the Parish in implementing elevations and acquisitions of RL/SRL structures. The scope of work included homeowner outreach and education, milestone site inspections, review of elevation certificates and engineering design plans, increased cost of compliance (ICC) claims, amendment requests, procurement of asbestos services, title services, demolition services, official closing and demolition of each applicable structure, and final project closeout submissions to GOHSEP and FEMA for the grant application.</p>
Customer Reference:	<p>Robby Miller Tangipahoa Parish Government P.O. Box 215 Amite, LA 70422 (225) 635-3861 ParishPres@Tangipahoa.org</p>

St. Mary Parish HMGP Hazard Mitigation Plan Update

Staffing Support Area Relevance	Area 2
Prime or Subcontractor	QES was the prime contractor.
Customer:	St. Mary Parish Government
Project Name:	St. Mary Parish HMGP Hazard Mitigation Plan Update
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	4
Type of Government Agency:	Parish
Program Value (Grant Size):	\$75,000
Duration of Engagement:	March 2020–October 2021
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ GIS ▪ Program Management ▪ Risk Assessment <p>QES was selected by St. Mary Parish to develop their Hazard Mitigation Plan following 44 Code of Federal Regulations (CFR) Part 201 Mitigation Planning. QES researched the Parish to create the hazard mitigation plan, which showed the level of risk to the Parish from flooding, hurricanes, and other disaster events. This plan has been approved and adopted by the Parish, and by the cities in the Parish.</p>
Customer Reference:	<p>Henry “Bo” Legrange St. Mary Parish Government</p>

500 Main St.
Franklin, LA 70538
(337) 828-4100
H.Lagrange@StMaryParishLA.gov

Livingston Parish Gravity Drainage District #1 Watershed Program Management

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	QES was the prime contractor.
Customer:	Livingston Parish Gravity Drainage District #1
Project Name:	Livingston Parish Gravity Drainage District #1 Watershed Program Management
Grant Program:	FEMA Hazard Mitigation Assistance (HMA)
Number of Staff Provided:	20
Type of Government Agency:	Parish Agency
Program Value (Grant Size):	\$55,300,000
Duration of Engagement:	2011–present
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ Program Management ▪ Civil Design ▪ Community Rating System ▪ Watershed Management ▪ H&H Study & Analysis ▪ GIS <p>QES was selected to provide necessary support via surveying and engineering services that would improve the drainage infrastructure throughout Livingston Parish Gravity Drainage District #1 (LPGDD1). The Louisiana Watershed Initiative selected 20 LPGDD1 pre-applications to advance and develop into full applications. This provided LPGDD1 and QES with an unprecedented opportunity to improve and accelerate the drainage improvements that are urgently needed throughout this district. The projects in this development include watershed studies, drainage analysis and improvements, channel expansion, detention/retention ponds, bridge upgrades and replacements, and underground drainage.</p>
Customer Reference:	<p>Wesley Kinnebrew Livingston Parish Gravity Drainage District #1-District Manager 8098 B Florida Blvd. Denham Springs, LA 70726 (225) 664-5827 wesley@lpgdd1.net</p>

Calcasieu Parish Police Jury LWI Region 4 Watershed Coordinator

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	QES was the prime contractor.
Customer:	Calcasieu Parish Police Jury
Project Name:	Calcasieu Parish Police Jury LWI Region 4 Watershed Coordinator
Grant Program:	FEMA Hazard Mitigation Assistance (HMA)
Number of Staff Provided:	10
Type of Government Agency:	Parish
Program Value (Grant Size):	\$309,835
Duration of Engagement:	August 2020–December 2021
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ Program Management ▪ Topographic Survey ▪ Civil Design ▪ Public Outreach ▪ H&H Study & Analysis <p>QES was selected as watershed coordinator for LWI Region 4, which consists of all or a portion of nine parishes: Allen, Beauregard, Calcasieu, Cameron, De Soto, Jefferson Davis, Rapides, Sabine, and Vernon.</p> <p>The scope of Watershed Coordinator is to develop a regional approach to identifying problems, developing solutions, and training for future mitigation. This is vital to provide a long-term solution for the Region 4 watershed. QES facilitated decisions regarding best land use, policy, and mitigation activities, and ensured implementation of a coordinated and inclusive planning process.</p>
Customer Reference:	<p>Bryan Beam, Administrator Calcasieu Parish Police Jury P.O. Box 1583 Lake Charles, LA 70726 Bryan.Beam@calcasieu.org</p>

Calcasieu Parish Police Jury ARPA Project Eligibility Reviews

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	QES was a subcontractor.
Customer:	Calcasieu Parish Police Jury

Project Name:	Calcasieu Parish Police Jury ARPA Project Eligibility Reviews
Grant Program:	American Rescue Plan Act of 2021 (ARPA)
Number of Staff Provided:	5
Type of Government Agency:	Parish
Program Value (Grant Size):	\$192,560 (value of subcontractor work)
Duration of Engagement:	2021–est. 2025
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ Grant Application Review ▪ Determine Eligibility ▪ Grant Documentation ▪ Program Monitor <p>QES was responsible for determining the eligibility of projects under the Office of Management and Budget (OMB)’s Uniform Guidance 2 CFR, Part 200, the Treasury’s Final Rule (FR) for the American Rescue Plan – State and Local Fiscal Recovery Funds, and all other programmatic guidance specific to the project.</p> <p>After determining eligibility, QES also provides each project with feedback on how to either remain in compliance or to align the project to the above rules. To date, QES has reviewed and provided feedback on 29 water projects that are still in the planning stages. Once projects commence work, QES will also monitor each project to ensure that they remain in compliance.</p>
Customer Reference:	<p>Bryan Beam, Administrator Calcasieu Parish Police Jury P.O. Box 1583 Lake Charles, LA 70726 (337) 721-3500 Bryan.Beam@calcasieu.org</p>

LA DOTD NFIP-CTP Program Management

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	QES was the prime contractor.
Customer:	Louisiana Department of Transportation and Development (LA DOTD)
Project Name:	LA DOTD NFIP-CTP Program Management
Grant Program:	FEMA National Flood Insurance Program (NFIP)
Number of Staff Provided:	4
Type of Government Agency:	State
Program Value (Grant Size):	\$50,000
Duration of Engagement:	June 2021–est. 2025

Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ Program Management ▪ Civil Design ▪ Community Rating System ▪ Watershed Management ▪ H&H Study & Analysis ▪ GIS <p>QES is providing professional services to LA DOTD to accomplish the goals of the FEMA NFIP and the Cooperating Technical Partnership (CTP) Programs. All processes and deliverables are being completed in accordance with FEMA's <i>Policy Standards for Flood Risk Analysis and Mapping</i>. The program is intended to ensure that communities participating in the NFIP are achieving flood loss reduction objectives, and to provide program assessment and assistance services to aid in the implementation of comprehensive flood loss reduction programs.</p>
Customer Reference:	<p>Susan Veillon 1201 Capital Access Road Baton Rouge, LA 70802 (225) 379-3017 Susan.Veillon@la.gov</p>

Livingston Parish Gravity Drainage District No.1 GIS Program Management

Staffing Support Area Relevance	Area 4
Prime or Subcontractor	QES was the prime contractor.
Customer:	Livingston Parish Gravity Drainage District #1 (LPGDD1)
Project Name:	Livingston Parish Gravity Drainage District No.1 GIS Program Management
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	6
Type of Government Agency:	Parish Agency
Program Value (Grant Size):	\$65,000
Duration of Engagement:	January–September 2020
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ HMGP ▪ Drainage ▪ Hydraulic and Hydrology Study ▪ GIS ▪ Community Rating System <p>QES created a geographic information system (GIS) for LPGDD1 that is used in district daily operations to help Parish and city officials within the district to collect the data needed to achieve better Community Rating System ratings. QES administered a</p>

	rigorous quality assurance and quality control program for information collected by the crew members of field operations departments as part of daily field operations. Information stored in the GIS enabled QES to create a district infrastructure report card to assist with planning and maintenance.
Customer Reference:	Wesley Kinnebrew Livingston Parish Gravity Drainage District #1-District Manager 8098 B Florida Blvd. Denham Springs, LA 70726 (225) 664-5827 wesley@lpgdd1.net

Tangipahoa Parish Skinner Drive Drainage Improvement Project

Staffing Support Area Relevance	Area 4
Prime or Subcontractor	QES was the prime contractor.
Customer:	Tangipahoa Parish Government
Project Name:	Tangipahoa Parish Skinner Drive Drainage Improvement Project
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	6
Type of Government Agency:	Parish
Program Value (Grant Size):	\$66,500
Duration of Engagement:	Design: October 2019–November 2021, Construction: December 2021–est. 2023
Staffing Support Services Provided:	<ul style="list-style-type: none"> ▪ Topographic Survey ▪ Civil Design ▪ Drainage Improvement ▪ Hydrologic & Hydraulic Study & Analysis ▪ Benefit Cost Analysis ▪ Utility Coordination <p>The purpose of this project is to provide solutions for drainage issues along Skinner Drive. The area is in Flood Zone X according to the FEMA Flood Insurance Rate Map, with base elevation at 42.3 ft. The surface water has historically sheet flowed from properties directly on the road, which carried it towards the outfall location. The outfall is located at the northeast corner of the subdivision, where runoff water collects in the grate inlet and gets taken away to the existing channel. QES employed the National Resources Conservation Service (NRCS) TR-55 Method as the loss rate method, and used the NRCS Travel-Time Method to calculate concentration times. Green Acres Subdivision doesn't have any drainage structures to carry the water. All of the runoff sheets flow along the curbing of the road towards the outfall. Existing vegetation on the curbing obstructs the current path to the outfall. The road is crowned at the center, making it harder for water</p>

	to cross the street at the intersections with adjacent streets. QES was selected to provide a hydrologic study and develop plans for the installation of a new subsurface system along the street to provide a clear path to the outfall location.
Customer Reference:	Henry “Bo” Legrange St. Mary Parish Government 500 Main St. Franklin, LA 70538 (337) 828-4100 H.Lagrange@StMaryParishLA.gov

Acadia Parish Wind Retrofit

Staffing Support Area Relevance	Area 4
Prime or Subcontractor	QES was the prime contractor.
Customer:	Acadia Parish Police Jury
Project Name:	Acadia Parish Wind Retrofit
Grant Program:	FEMA Hazard Mitigation Grant Program (HMGP)
Number of Staff Provided:	70
Type of Government Agency:	Parish
Program Value (Grant Size):	Construction Amount: \$1,200,000
Duration of Engagement:	January 2012–September 2014
Staffing Support Services Provided:	<p>Project Management Wind Hardening Impact Rated Windows And Doors Saferoom, Roof Strap & Retrofit Design Bid Meeting & Analysis Resident Inspection</p> <p>QES was responsible for providing engineering and design for seven different safe rooms throughout the Parish. The safe rooms were external buildings constructed in accordance with FEMA 361 and FEMA 320, as applicable. The safe room was designed to shelter people during a hurricane. A ventilation system is installed within the safe room and standby power is included in the overall design of the project. The safe room was constructed in compliance to the International Code Council Standard for the Design and construction of Storm Shelter (ICC 500-2008) and the Design and Construction Guidance for Community Shelters publication (FEMA 361).</p>
Customer Reference:	Ashley LeBlanc, OHSEP Director Acadia Parish Police Jury 568 NE Court Circle

Crowley, LA 70527
 (337) 783-4357
 AcadiaOHSEP@APPJ.org

Greater Lafourche Port Commission Airport Terminal Building Grant Writing

Staffing Support Area Relevance	Area 1
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Greater Lafourche Port Commission (GLPC)
Project Name:	Greater Lafourche Port Commission GAO Airport Terminal Building Grant Writing
Grant Program:	IIJA Federal Aviation Administration (FAA) Airport Terminal Program
Number of Staff Provided:	2
Type of Government Agency:	Political subdivision of the state
Program Value (Grant Size):	\$1,000,000
Duration of Engagement:	October 2022; awaiting award selections
Staffing Support Services Provided:	GIS is providing design services for the new terminal building, to be funded by GLPC and LA DOTD aviation funds. With the FAA's release of the Airport Terminal Program, funded by the IIJA, GLPC wished to diversify the funding sources. GIS provided grant writing assistance to apply for the FY 2023 Airport Terminal Program.
Customer Reference:	Chett Chiasson Executive Director Greater Lafourche Port Commission 16829 E. Main Street Cutoff, LA 70345 (985) 632-6701 chettc@portfourchon.com

Town of Golden Meadow Drainage Improvements

Staffing Support Area Relevance	Areas 1, 3, 4
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Town of Golden Meadow
Project Name:	Town of Golden Meadow Drainage Improvements
Grant Program:	FEMA Building Resiliency Infrastructure and Communities (BRIC), Flood Mitigation Assistance (FMA),

Number of Staff Provided:	2
Type of Government Agency:	City/Town
Program Value (Grant Size):	\$3,500,000
Duration of Engagement:	October 2022 and submission due to GOHSEP December 19, 2022
Staffing Support Services Provided:	The town has experienced numerous flooding issues and requested GIS to evaluate and recommend drainage improvement projects for flood protection in order to pursue grant funding assistance. GIS prepared grant applications to pursue IIJA funds to address these drainage projects. Additionally, as town engineer, GIS has provided both Project Management and Engineering Technical Expertise.
Customer Reference:	Joey Bouziga Mayor Town of Golden Meadow P.O. Box 307 Golden Meadow, LA 70357 (985) 475-5163 joey.bouziga@chouest.com

Lafourche Parish Valentine Pontoon Bridge Replacement

Staffing Support Area Relevance	Areas 1, 2, 3, 4
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Lafourche Parish Government
Project Name:	Lafourche Parish Valentine Pontoon Bridge Replacement
Grant Program:	U.S. Department of Transportation (DOT) Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Transportation Discretionary Grant Program
Number of Staff Provided:	4
Type of Government Agency:	Parish
Program Value (Grant Size):	\$2,626,679
Duration of Engagement:	September 2021–present
Staffing Support Services Provided:	GIS led the planning, initial inspections, engineering, environmental compliance (permitting), surveying (topographic/hydrographic), grant applications (successful application awarded \$2.6M in RAISE Grant funds), and coordinating geotechnical, electrical, mechanical, utility relocation, & DOTD activities. GIS will also provide future services such as public bid support and construction management services inclusive of construction administration and construction inspection. GIS managed the successful grant application for the RAISE Discretionary Grants and will manage the grant throughout construction and project closeout.

Customer Reference:	<p>Archie Chaisson, III Parish President Lafourche Parish Government 402 Green Street Thibodaux, LA 70301 (985) 446-8427 chaissonap@lafourchegov.org</p>
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Grand Isle Independent Levee District Marsh Rehabilitation Plans for Fifi Island

Staffing Support Area Relevance	Areas 1 and 4
Prime or Subcontractor	GIS was the prime contractor
Customer:	Grand Isle Independent Levee District
Project Name:	Grand Isle Independent Levee District Marsh Rehabilitation Plans for Fifi Island
Grant Program:	National Fish and Wildlife Foundation (NFWF) National Coastal Resilience Fund (NCRF)
Number of Staff Provided:	2
Type of Government Agency:	Levee District
Program Value (Grant Size):	\$614,000
Duration of Engagement:	June 2022
Staffing Support Services Provided:	<p>Created preliminary designs to nourish up to 371 acres of marsh on Fifi Island protected by rock dikes. The project will enhance habitat for fish and threatened birds, including the black rail and seaside sparrow, and mitigate wave energy during storms that threaten Grand Isle.</p> <p>For the grant writing phase, GIS provided one grant writer (PE with expertise in coastal engineering), with coordinating support from a team member with strong relationships with the client.</p>
Customer Reference:	<p>David Camardelle President and Executive Director Grand Isle Independent Levee District P. O. Box 757 Grand Isle, LA 70358 (985) 787-2222 gilevee@yahoo.com</p>

Terrebonne Parish Bayou Petit Caillou Drainage Pump Station

Staffing Support Area Relevance	Areas 3 and 4
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Terrebonne Parish Consolidated Government
Project Name:	Terrebonne Parish Bayou Petit Caillou Drainage Pump Station
Grant Program:	Revived Economies of the Gulf Coast States Act (RESTORE Act) and FEMA HMGP
Number of Staff Provided:	5
Type of Government Agency:	Parish
Program Value (Grant Size):	\$5,685,525
Duration of Engagement:	June 2016–June 2021
Staffing Support Services Provided:	<p>GIS provided topographic and hydro-survey services required for the design of the proposed pump station. GIS also provided structure elevations surveys for representative areas within the Lower Little Caillou Watershed that contained approximately 1,500 structures as part of the H&H study required to complete the Justification Report to determine the number of structures that will be affected within the watershed (residential & commercial) (2, 5, 10, 25 and 100 year storm events) for a FEMA grant and approval.</p> <p>Performed H&H modeling to obtain and support BCA, provided drainage design plans, construction plans and specifications, supplied cost estimate stamped by a Louisiana Licensed Engineer, and managed construction administration over federal compliance.</p>
Customer Reference:	<p>Gordon Dove Parish President Terrebonne Parish Consolidated Government Government Tower, 8026 Main Street, Suite 700 Houma, LA 70360 (985) 873-6401 gdove@tpcg.org</p>

Terrebonne Levee District Falgout Canal Floodgate and Receiving Structure

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Terrebonne Levee and Conservation District
Project Name:	Project Management for Terrebonne Levee District Falgout Canal Floodgate and Receiving Structure
Grant Program:	Community Development Block Grant (CDBG) Entitlement Funds

Number of Staff Provided:	6
Type of Government Agency:	Levee District
Program Value (Grant Size):	\$16,800,000
Duration of Engagement:	January 2017–July 2019
Staffing Support Services Provided:	GIS performed project management, including construction administration and on-site representation to observe and report daily construction activities; reviewed submittals, requests for information (RFIs), and pay applications services on behalf of the District. GIS also performed project grant administration closeout duties as required by CDBG grant guidelines.
Customer Reference:	Reggie Dupre Executive Director Terrebonne Levee and Conservation District 220-A Clendenning Road Houma, LA 70363 (985) 868-8523 rdupre@tlcd.org

South Lafourche Levee District Grand Bayou Floodgate Project Management

Staffing Support Area Relevance	Area 3
Prime or Subcontractor	GIS was the prime contractor.
Customer:	South Lafourche Levee District
Project Name:	South Lafourche Levee District Grand Bayou Floodgate Program Management
Grant Program:	Gulf of Mexico Energy Security Act (GOMESA)
Number of Staff Provided:	5
Type of Government Agency:	Levee District
Program Value (Grant Size):	\$18,500,000
Duration of Engagement:	February 2020–August 2021
Staffing Support Services Provided:	GIS performed project management, including construction administration and on-site representation to observe and report daily construction activities, reviewed submittals, requests for information (RFIs), and pay applications services on behalf of the South Lafourche Levee District. GIS also performed grant administration closeout duties as per GOMESA funding guidelines.
Customer Reference:	Windell Curole General Manager South Lafourche Levee District 17904 LA-3235

Galliano, LA 70354
 (985) 632-7554
 wcurole@sllld.org

Terrebonne Parish Hollywood Road Extension and Bridge Project Management

Staffing Support Area Relevance	Areas 1, 3, and 4
Prime or Subcontractor	GIS was the prime contractor.
Customer:	Terrebonne Parish Consolidated Government
Project Name:	Terrebonne Parish Hollywood Road Extension and Bridge Project Management
Grant Program:	U.S. Treasury Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States Act (RESTORE Act)
Number of Staff Provided:	4
Type of Government Agency:	Parish
Program Value (Grant Size):	\$2,200,000
Duration of Engagement:	July 2019–present
Staffing Support Services Provided:	GIS provided professional engineering services to the Terrebonne Parish Consolidated Government, including managing geotechnical investigation, structural analysis, and coordination with Traffic Engineering and DOTD District Traffic Engineer. Completed RESTORE Act application with Terrebonne Parish, provided construction documents and specifications, and supplied cost estimate stamped by Louisiana licensed engineer.
Customer Reference:	Jeanne Bray Capital Projects Administrator Terrebonne Parish Consolidated Government Government Tower, 8026 Main Street, Suite 200 Houma, LA 70360 (985) 873-6720 jbray@tpcg.org

Engineering Services for Terrebonne Parish Elliot Jones Conveyance and Pump Station

Staffing Support Area Relevance	Area 4
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Prime or Subcontractor	GIS was the prime contractor.
Customer:	Terrebonne Parish Consolidated Government
Project Name:	Engineering Services for Terrebonne Parish Elliot Jones Conveyance and Pump Station
Grant Program:	Gulf of Mexico Energy Security Act (GOMESA)
Number of Staff Provided:	6
Type of Government Agency:	Parish
Program Value (Grant Size):	\$10,000,000
Duration of Engagement:	August 2018–est. 4th quarter 2023
Staffing Support Services Provided:	<p>GIS led all planning, engineering, environmental compliance (permitting), engineering surveys, and coordinated geotechnical engineering & investigation activities. In addition, GIS also managed bidding and negotiations with interested contractors, and is currently providing construction management services. GIS' construction management services include construction administration and on-site representation to observe and report daily construction activities.</p> <p>Also performed H&H modeling to obtain and support BCA, provided drainage design plans, construction plans and specifications, supplied cost estimate stamped by a Louisiana licensed engineer, and managed construction administration over federal compliance.</p>
Customer Reference:	<p>Gordon Dove Parish President Terrebonne Parish Consolidated Government Government Tower, 8026 Main Street, Suite 700 Houma, LA 70360 (985) 873-6401 gdove@tpcg.org</p>

Engineering Services for Town of Golden Meadow Sewer System – Phase 7

Staffing Support Area Relevance	Area 4
Prime or Subcontractor	GIS was the prime contractor
Customer:	Town of Golden Meadow
Project Name:	Engineering Services for Town of Golden Meadow Sewer System – Phase 7
Grant Program:	U.S. Treasury Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States Act (RESTORE Act)
Number of Staff Provided:	3
Type of Government Agency:	City/Town

Program Value (Grant Size):	\$990,000
Duration of Engagement:	April 2019–est. December 2023
Staffing Support Services Provided:	GIS provided all surveys, design, construction administration and resident project representative services. Provided sewer design plans, construction plans and specifications, and supplied cost estimate stamped by a Louisiana licensed engineer.
Customer Reference:	Joey Bouziga Mayor Town of Golden Meadow P.O. Box 307 Golden Meadow, LA 70357 (985) 475-5163 joey.bouziga@chouest.com

List of Grant Applications Awarded

In Table 1 below, we have provided a list of grant applications that were applied for and awarded over the past three years.

TABLE 1: GRANT APPLICATION EXPERIENCE. *The HGA Team has extensive experience supporting development of successful federal grant applications across multiple programs, including IJJA.*

Firm	Name of Grant Application Applied for and Awarded Over the Past 3 Years	Federal Agency	Program Name	Funding Amount Received	Year of Award
HGA	HMGP DR-4459 Structural Elevation/Reconstruction Cameron Parish	FEMA	HMGP	\$5,675,550	2020
HGA	FY19 FMA - 25th Street Canal City of Gretna	FEMA	FMA	\$14,003,289	2019
HGA	DR-4439 Critical Facilities Wind Retrofit City of Ruston	FEMA	HMGP	\$1,000,000	2020
HGA	DR 4439 Generator Project Lincoln Parish and City of Ruston	FEMA	HMGP	\$2,185,176	2020
HGA	DR-4570 - Generator Project St. Landry Parish	FEMA	HMGP	\$894,483	2021
HGA	DR-4570 - Stormwater Drainage Study St. Landry Parish	FEMA	HMGP	\$852,235	2021

Firm	Name of Grant Application Applied for and Awarded Over the Past 3 Years	Federal Agency	Program Name	Funding Amount Received	Year of Award
HGA	DR-4263 Davis Lake Pump Station Tensas Basin Levee District	FEMA	HMGP	\$580,969	2020
QES	Flood Mitigation Assistance for Acadia Parish Police Jury, 2018-23	FEMA	FMA	\$1,923,252	2020
QES	Flood Mitigation Assistance for Iberia Parish, 2019-107	FEMA	FMA	\$2,593,602	2021
QES	Flood Mitigation Assistance for St. Mary Parish, 2020-15	FEMA	FMA	\$174,600	2022
QES	HMGP 4080-18, St. Mary Parish 911 Center Wind Retrofit and Safe Room	FEMA	HMGP	\$717,826	2019
QES	HMGP 4458-5, St. Mary Parish Lantz Donahoe Pump Station Ditch	FEMA	HMGP	\$1,093,588	2019
QES	Flood Mitigation Assistance for Rapides Area Planning Commission, 2019-18	FEMA	FMA	\$2,948,406	2021
QES	Flood Mitigation Assistance for Rapides Area planning Commission, 2020-053	FEMA	FMA	\$2,429,394	2022
QES	Flood Mitigation Assistance for City of Walker, 18-13	FEMA	FMA	\$861,360	2020
QES	Flood Mitigation Assistance for City of Walker, 19-19	FEMA	FMA	\$454,273	2021
GIS	Lafourche Parish Valentine Pontoon Bridge Replacement	U.S. Department of Transportation	RAISE Discretionary Grants	\$2,626,679	2022
GIS	Hollywood Road Extension and Bridge/Terrebonne Parish Consolidated Government	US Department of the Treasury	RESTORE Act/Gulf Coast Restoration Trust Fund	\$1,177,891	2020
GIS	Upper Terrebonne Basin Drainage Improvements/Upper Delta Soil and Conservation District	US Department of Housing and Development / CDBG	Louisiana Watershed Initiative	\$9,170,000	2022

Firm	Name of Grant Application Applied for and Awarded Over the Past 3 Years	Federal Agency	Program Name	Funding Amount Received	Year of Award
GIS	Fifi Island	Department of Commerce/NOAA	NFWF National Coastal Resilience Fund	\$614,000	2022
GIS	Downriver Container Terminal – Berth I/Port of New Orleans	LADOTD	Port Priority Program	\$15,000,000	2020

Staffing Support Resources

The HGA Team has a combined total of 835 employees. HGA and its subcontractors PAE, GIS, and QES are financially sound firms with lines of credit. As the prime contractor, HGA maintains the financial resources and stability needed to perform on this contract and assumes responsibility for its subcontractors. Financial documents which include revenue numbers for each member of the HGA Team are being mailed under separate copy to LITACorp. Approximately fifty percent of HGA’s revenue is generated from public sector clients. A significant portion of our subcontractors’ revenue streams are from public sector clients. HGA regularly places our interdisciplinary team of project managers, engineers, GIS specialists, and grant administrators with public sector clients.

HGA encourages professional growth in its employees. We sponsor additional training and certifications for our staff including the Professional Engineer registration, Certified Floodplain Manager certification, Project Management Professional designation, Xactimate Inspector certifications, and Grant Writing workshops to name a few. See the section of this proposal entitled Overall Approach for the Four Services Areas for more information on our staffing support resources.

Subcontractor Company Overview

Pan American Engineers (PAE)

Year of Founding: 1975

Current Size of Staff: 80

Latest Annual Revenue: See separately submitted financial documents.

Corporate Profit: See separately submitted financial documents.

Sales Growth: See separately submitted financial documents.

Principal Owners: Thomas C. David, Jr., P.E., P.L.S.

Areas of Focus: Engineering, Surveying, Consulting, and Management Services

Levels of Government Served: State, County/Parish, and City/Community

Location of Headquarters: Alexandria, LA

Location of Nearest Office: Alexandria, LA

Quality Engineering & Surveying, LLC, (QES)

Year of Founding: 2009

Current Size of Staff: 70

Latest Annual Revenue: See separately submitted financial documents.

Corporate Profit: See separately submitted financial documents.

Sales Growth: See separately submitted financial documents.

Principal Owners: President Deric J. Murphy, PE, LSI; CAO Jamie Seal, CFM

Areas of Focus: Program Management, Civil Engineering, Land Surveying, Landscape Architecture

Levels of Government Served: State, County/Parish, and City/Community

Location of Headquarters: Port Vincent, LA

Location of Nearest Office: Baton Rouge, LA

GIS Engineering, LLC (GIS)

Year of Founding: 2016

Current Size of Staff: 265

Latest Annual Revenue: See separately submitted financial documents.

Corporate Profit: See separately submitted financial documents.

Sales Growth: See separately submitted financial documents.

Principal Owners: Dustin Malbrough, President and Oneil Malbrough, Sr. Vice President

Areas of Focus: Coastal Infrastructure, Civil and Structural Engineering, including Transportation, Water, Wastewater, Structural, Marine, Energy, Flood Protection, and Environmental Engineering

Levels of Government Served: State, County/Parish, and City/Community

Location of Headquarters: Houma, LA

Location of Nearest Office: Baton Rouge, LA

Subcontractor Background History

Pan American Engineers, LLC, (PAE)

PAE has been involved with grant programs for more than 40 years, and has continuously provided grant management services for projects throughout Louisiana since 1975, to include providing training and technical assistance to Subgrantees. PAE has 45 years of experience in supporting federal grant programs in Louisiana and has provided technical assistance and training to more than 200 governmental and non-profit staff.

In the late 1970s, PAE began working with local grantees in coordination with the New Orleans HUD field office to provide engineering and grant management services. In the early 1980s, PAE worked on projects through HUD's State CDBG Program, administered through the Louisiana Division of Administration. PAE has also provided CDBG technical assistance and staff augmentation to the City of Alexandria, a HUD Entitlement grantee. They have also worked supported numerous housing authorities with technical assistance on how to follow HUD procurement/compliance regulations.

Since 2007, PAE has been directly involved with the Louisiana Office of Community Development (OCD) and its development of the State Implementation Plan for Katrina/Rita grant activities, and with many local governments and school systems to help them develop and carry out CDBG-funded projects. PAE provided grant management services to more than a dozen local governments and served as the lead grant manager for the City of Lake Charles, Calcasieu Parish School Board, Calcasieu Parish Policy Jury, Allen Parish Police Jury, Plaquemines Parish, Plaquemines Parish School Board, and other local and state entities. In 2014 and 2017, PAE was chosen by OCD to provide grant management services to the State for the ongoing Hurricanes Katrina/Rita, Gustav/Ike, and some Hurricane Isaac projects. PAE worked with numerous Grantees and Subgrantees, including Iberville, Calcasieu, Pointe Coupée, and East Carroll Parishes and the Louisiana Coastal Protection and Restoration Authority (CPRA) on the development of their recovery plans and the implementation of their projects. Under the Gustav/Ike Program, OCD also developed the Community Resiliency Program, the Affordable

Housing Program, and the Municipalities Infrastructure Program, and provided grant management technical assistance for the programs to various local Grantees and Subgrantees.

PAE was originally established in New Orleans in 1942 and relocated to Alexandria in 1943 to provide engineering services related to the construction of Alexandria Army Air Base (later England Airbase). PAE has been in continuous operation for over 75 years, providing engineering, surveying, consulting, and management services out of its centrally-located Alexandria office. Incorporated in 1975, PAE is currently a member-managed limited liability company.

Quality Engineering & Surveying, LLC, (QES)

Founded in 2009 by Deric J. Murphy, PE, LSI as a two-man engineering firm focusing on site development, Quality Engineering has grown to over 70 employees and is now a fully capable and licensed survey, civil engineering, landscape architecture, and grant program management firm. In 2012, Jamie Seal, CFM became a partner and principal. Quality has been recognized by LSU as a TIGER Top 100 for the past 3 years, The Baton Rouge Business Report as one of the “Best Places to Work,” and has been awarded top recognitions by the Baton Rouge Growth Coalition and the American Council of Engineering Companies for its good growth design, and comprehensive flood and drainage planning.

Quality’s initial clients were in its home parish of Livingston, where the company has become the engineer of record for numerous drainage districts, fire protection districts, and the parish itself. In the subsequent years, Quality has been asked by parishes and municipalities across the state to bring its expertise to their problems and opportunities. Quality has expanded to serve St. Mary, Tangipahoa and many more parishes in Louisiana where we have served as the grant writer, grant manager, project manager, and have provided technical support on grant projects. Our drainage engineers and surveyors have assisted in 30 federally funded projects as technical support.

GIS Engineering, LLC (GIS)

GIS Engineering’s predecessor, GIS, Inc., was established in 1948, and has had a continuous presence in the region since then. GIS Engineering, LLC was established in 2016, currently employing 265 staff members, and has been providing the services that its clients require to

achieve success. GIS collaborates across geographies and markets to provide the innovative solutions driven by the commitment to our clients. They are proud of their long-standing relationships with local, state, and federal clients and their track record of completing successful projects in the region. In 2016, GIS Engineering – Coastal and Infrastructure Division began operating in Houma, LA, with a focus on coastal infrastructure and servicing governmental entities, levee boards, and ports. Over the last six years, GIS’s areas of focus have expanded into geographic markets throughout southeast Louisiana, where they have established offices in Baton Rouge, New Orleans, Lafayette, New Roads, Houma, Thibodaux, Napoleonville, and Galliano. GIS’s regional coverage expanded due to 92% of its clients being repeat customers. This repeat business gave the firm the financial strength to expand into other civil and structural engineering disciplines, such as transportation, water, wastewater, structural, marine, energy, flood protection, and environmental engineering.

GIS has provided staffing support for many municipal clients throughout south Louisiana, on grants provided by the IJJA, Louisiana Department of Transportation and Development (LA DOTD) Port Priority Program, Louisiana Capital Outlay Funding Requests, U.S. Maritime Administration (MARAD), the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Transportation Discretionary Grant program, the Resources and Ecosystems Sustainability, Tourist Opportunities, and Revived Economies of the Gulf Coast States Act (RESTORE Act), and Louisiana Watershed Initiative (LWI).

Subcontractor Financial Strength

The HGA Team has more than sufficient financial capacity to provide all of the services outlined in the SOW. HGA and our subcontractors are privately-owned companies; therefore, our financial statements are highly confidential. For this reason, **HGA, PAE, GIS, and QES have provided their financial statements directly to LITACorp** via sealed hard copies.

Subcontractor Contact Information

LITACorp can contact our subcontractors directly via the following Points of Contact (POCs):

Pan American Engineering, LLC
Thomas C. David, Jr., P.E., P.L.S.
President



P.O. Box 8599 (71306)
1717 Jackson Street
Alexandria, Louisiana 71301
Phone: (318) 473-2100
Fax: (318) 473-2275
tom@paealex.com

Quality Engineering & Surveying, LLC

Deric J. Murphy, PE, LSI
CEO and President
18320 Hwy. 42
Port Vincent, LA 70726
Phone: (225) 698-1600
Fax: (225) 698-3367
dmurphy@qesla.com

GIS Engineering, LLC

Jacob Loeske, PE, LSI
Director of Engineering
450 Laurel Street, Suite 1500
Baton Rouge, LA 70801
Phone (985) 665-2262
Fax (985) 475-7014
jloeske@gisy.com

TAB 3 – CERTIFICATION STATEMENT

Please see the following page for the completed Certification Statement.

Attachment V: Certification Statement (Form)

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of this Request for Proposals (RFP), including attachments.

OFFICIAL CONTACT LITACorp requests that the Proposer designate one (1) person to receive all documents and the method in which the documents are best delivered. The Proposer should identify the Contact name and fill in the information below: (Print Clearly)

Date: 12/21/22

Official Contact Name: Jack Hunt

A. E-mail Address: jhunt@hga-llc.com

B. Facsimile Number with area code: (225) 529-3778

C. US Mail Address: 9357 Interline Ave, Baton Rouge, LA 70809

The Proposer shall certify that the above information is true and shall grant permission to the LITACorp to contact the above-named person or otherwise verify the information provided. By its submission of this proposal and authorized signature below, Proposer shall certify that:

1. The information contained in its response to this RFP is accurate;
2. Proposer shall comply with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein;
3. Proposer shall accept the procedures, evaluation criteria, mandatory contract terms and conditions, and all other administrative requirements set forth in this RFP;
4. Proposer's Financial Proposal shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal response;
5. Proposer understands that if contract negotiation period exceeds thirty (30) days or if the selected Proposer fails to sign the contract within seven (7) calendar days of delivery of it, the State may elect to cancel the award and award the contract to the next most advantageous responsible Proposer; and
6. Proposer shall certify, by signing and submitting a proposal, the Proposer certifies that their company, any subcontractors, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in "Audit Requirements in Subpart F of the Office of Management and Budget's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards" (formerly OMB Circular A-133). (A list of parties who have been suspended or debarred can be viewed via the internet at <https://www.sam.gov>).

Authorized Signature: 

Typed or Printed Name: Jack Hunt

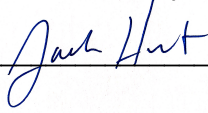
Title: Principal

Company Name: Hunt, Guillot & Associates, LLC (HGA)

Address: 9357 Interline Ave

City: State: Zip: , Baton Rouge, LA 70809

SIGNATURE of Proposer's Authorized Representative



DATE 12/21/22

TAB 4 – PROPOSED STAFFING SUPPORT

Overall Approach for the Four Services Areas

The résumés included this proposal in Attachment 3: Résumés are representative examples of our cadre of professional project managers, architects, engineers, damage assessors, and grant managers. Our proposed staff are all current employees of HGA or of our subcontractors PAE, GIS, and QES. We have identified staff to support LITACorp in all Staffing Support Areas upon contract award. We are committed to providing key personnel for the full term of the contract.

HGA Team Office Locations Across the State



If additional staffing is needed, the HGA Team is experienced in rapid ramp-up of projects and has the ability to recruit and train large numbers of staff in a short period. HGA’s in-house Staffing Division gives us the flexibility to quickly ramp up or down based on client need, to include supporting rapid ramp-up of staff and identifying local talent.

HGA’s proposed subcontractors PAE, QES, and GIS are established firms with staff available and ready to support LITACorp. However, should the need arise to recruit additional subcontractors for staffing support, HGA has a large network of contractors that they have worked alongside

on grant programs in Louisiana and other states. These pre-established relationships will facilitate faster responses to the LITACorp’s needs. HGA will thoroughly evaluate any potential subcontractors or staff member based on prior performance and ability to perform the tasks required.

Because the HGA Team has an extensive experience with grant-funded projects we bring a full assortment of documents, templates, reporting systems, policies, and procedures to the project that can easily be adapted to meet specific needs. This pre-established cache of material means we are ready to get to work immediately upon contract award. These materials also serve as the basis for training programs to prepare our staff for the LITACorp grant application and grant administration consulting services.

HGA management maintains a continuous cycle of training and feedback with employees to ensure staff understand what is expected of them and have the needed skill set to perform at the highest level. Our employees are HGA’s greatest asset. We offer competitive rates and benefit packages to recruit and retain quality personnel. HGA has formal programs in place to reward employees that are excelling in their positions and to recognize staff that are demonstrating HGA’s core values of teamwork, trust, safety, cost effectiveness, excellence, and customer service. HGA has been selected as one of the Best Places to Work multiple times by the Baton Rouge Business Report.



Matt Brickley, our proposed Program Manager, is an experienced project manager with years of “boots on the ground” experience helping communities plan for and mitigate against the effects of disasters. He is experienced in managing large-scale projects with layers of subcontractors. Matt will be responsible for ensuring the work performed by the HGA Team is of the highest quality and also for maintaining the required staffing support levels for LITACorp.

His career background includes extensive delivery of key priorities in information technology, operations, supply chain, construction, and growth positioning. He directed COVID-19 support

for a temporary hospital with more than 2,000 staff in New Orleans, LA to include providing expertise in logistics, staffing, policies, protocols, and standard operating procedures. Currently HGA Project Manager Matt Brickey is overseeing County, State, and Treasury project eligibility reviews and reporting for ARPA and leading IIJA and funded broadband grant programs work for multiple clients. Matt has supported the following Louisiana entities with research, eligibility reviews, applications, and grant administration:

- City of Lake Charles
 - IIJA—Safe Streets for All, Reconnecting Communities
 - IIJA— Strengthening Mobility and Revolutionizing Transportation (SMART) and Electric Vehicle (EV) Infrastructure Program
 - National Endowment for Humanities and National Park Service Competitive Grants
- Jackson Parish
 - Department of Justice (DOJ) grant funding through the Department’s Office of Community Oriented Policing Services (COPS) Program
- Ouachita Parish and Delta Regional Agriculture and Sustainability District
 - Federal Communications Commission’s (FCC) Affordability Connectivity Program (ACP) Outreach Grant
- Ouachita Parish and East Feliciana Parish
 - American Rescue Plan Act (ARPA) Granting Unserved Municipalities Broadband Opportunities (GUMBO) Program

Area 1 Pursuing IIJA Grant Funding Approach

HGA will assist LITACorp clients with pursuing IIJA grant funding opportunities for viable projects under the IIJA Act’s specific requirements. HGA has completed over 750 applications worth more than \$2 billion in funding for over 600 applicants. Our Team will provide the following comprehensive services to LITACorp clients:

- Develop grant applications.
- Develop detailed scopes of work.

- Support the procurement of both engineering firms and contractors.
- Demonstrate cost-effectiveness by performing benefit-cost analysis (BCA).
- Perform milestone inspections.
- Prepare quarterly reports.
- Perform financial management, to include participating in audits.
- Ensure compliance throughout the life of the project.

HGA staff are regulatory compliance experts and are at the forefront of the new federal funding made available through the IIJA. HGA is able to break down the complicated federal guidance into common language to guide the policies and procedures we develop in coordination with our clients. Our grant managers are continuously looking for additional grant funding options for our clients to fund more projects for their communities. We have helped to design programs for infrastructure and for local governments. HGA staff have been trained on BCA Toolkit Version 6.0, and are proficient in the art of completing BCAs for grant projects. Additionally, many of our staff are also Certified Floodplain Managers (CFMs) and members of the Association of State Floodplain Managers.

Coronavirus Aid, Relief, and Economic Security (CARES) Act Applications

In 2020, the State of Louisiana set aside a portion of its CARES allocation for local governments and agencies that would access the dollars through an application process managed by the State Office of Community Development. HGA supported seven parishes and four municipalities with application preparation and submittal for \$8 million in reimbursement for employee payroll, hazard pay, operations expenses, and purchase of supplies and equipment used to respond to COVID-19.

HGA believes that any program implemented with public funds will be successful only if the following criteria are met: (1) it is designed to maximize the outcomes that a community has identified as being a critical need or an important goal, and (2) it can comply with and meet the requirements of the funding. This starts with conducting a needs analysis and conducting outreach. Our approach to strategic outreach involves drawing on the input of all stakeholders, including residents and businesses in the project areas, elected officials, and local nonprofits. We conduct a funding needs analysis to determine justification for the project—an analysis that

demonstrates why funds should go to the project and how strategic outreach informed the work. At HGA, we work with the business community, as they form the backbone of public input and are already engaged in the community. In addition to face-to-face outreach, we are extremely familiar with—and know how to conduct—strategic outreach using information technology to gain input and inform the public about projects. Strategic planning, at minimum, involves the following elements:

- Programs and projects, vetted by their intent to conform to a grantor’s programmatic requirements and expectations, that complement a grantee’s long-term strategic plans (e.g., a Five-Year Consolidated Plan, Capital Improvement Plan, Affordable Housing Strategy, Business Development and Retention/Expansion, Comprehensive Economic Development Strategy, etc.)
- The ability to leverage other funding sources that can broaden a program or project scope that will realize what was thought to be unobtainable outcomes (similar federal and local funds that may require a match, local bonds or financing options, loan securitizations that open up other sources of grant funding, etc.)
- Proposed projects’ progress must be fully and easily reportable to funding sources in terms of beneficiaries served and community impact. When deliverables do not match reporting requirements, it can be problematic for a grantee to draw down eligible, allocable funds from their sources. HGA prides itself on working with all stakeholders to maximize reporting efficiency.
- Understanding cross-cutting federal statutory requirements, permitting, design, constructability, cost reasonableness, and market conditions has allowed us to make the necessary recommendations during the planning process and provide critical guidance to grantees as to what risks are involved in programs and projects. This expert guidance can provide the grantee with the understanding to explore project/program alternatives that are more in keeping with given constraints. With HGA’s decades of experience, our professionals understand the reality and constraints that make projects and programs feasible and successful.

The Granting Unserved Municipalities Broadband Opportunities (GUMBO) Program allocation, funded by the American Rescue Plan Act (ARPA), is an important first step to expanding high-speed internet access across unserved areas in Louisiana. Two of HGA's clients—Ouachita Parish and East Feliciana Parish—were selected for awards under this program. HGA looks forward to continuing to work with these two parishes to ensure broadband access to 100% of its residents and eliminate the digital divide.

HGA has designed, in tandem with grantees and subgrantees, outreach efforts that target the historically marginalized populations of grant service areas. Outreach includes early engagement and buy-in with numerous stakeholders across multiple platforms, including local meetings. Our public participation events include, at minimum:

- Multiple sites that are easily accessible, geographically
- Have assistive services (simultaneous translation, sign language interpreters, etc.)
- Are held in venues that are Section 504/ADA compliant
- Have been effectively promoted and marketed through local print and television media, communities of faith, social network/nonprofit community, chamber of commerce, public school systems, and other groups in an organized and planned approach long in advance of the public engagement event
- Are recorded for grant compliance purposes
- Provide written answers to public comment and questions in a timely manner
- Include a written public participation plan/strategy for documentation purposes



FIGURE 4: TARGETED OUTREACH MATERIALS. HGA designed this flyer for an Emergency Rental Assistance Program to target Spanish-speaking populations.

HGA is prepared to coordinate between federal, state, and local agencies. In all stakeholder interactions, HGA will serve as an advocate for LITACorp clients and make sure that any required coordination with other units of government takes place. We will assist client members with uploading documents to grant portals on time and ensure they are following the reporting requirements tied to the portal.

HGA's comprehensive understanding of federal grant requirements has led to us being innovative in creative matching of funds to complete ambitious projects that no one funding source will cover. We will assist with the coordination of regional and statewide projects to maximize impact and increase the competitiveness of submitted grant applications.

Matching Funds Success Story: Suffolk County, NY

The State of New York's GOSR identified the need to design and implement a sewer system and wastewater treatment facilities to replace septic tanks in Suffolk County, NY. The County suffered from repeated flooding and resulting sewage contamination from compromised septic tanks, which in turn damaged local marshes and wetlands that helped to mitigate storm surge damage. HGA worked with multiple agencies to put the funding for this resiliency effort together. The almost \$390 million project is being funded with \$243 million in FEMA HMGP funding, \$67 million in HUD CDBG-DR funding, \$59 million from New York State Water Quality and Capital Programs, \$20 million through low-interest loans from the Clean Water State Revolving Fund, and \$4 million from the Empire State Development grant program. Without this complex funding package, Suffolk County would not have had the funds for these extensive local mitigation activities.

HGA also developed a detailed technical report regarding the failure of on-site wastewater systems at the residences to be served by the project, including levels of risk and potential future costs by location. GOSR was able to use this report to develop an eligible BCA, and ultimately received FEMA approval of its HMGP application.

Area 2 Managing Successful IJIA Grant Applications Approach

The HGA Team will perform a policy inventory for each LITACorp client to determine which policy documents need to be revised; which policy documents are good as is; and which policy documents need to be created from scratch. HGA's decision support system VistaTRAK offers

an online document repository that we can leave with the clients to house their policy documents and project files. VistaTRAK also includes a user-friendly dashboard reporting and tracking feature. Our team will also assist clients with entering their reports into any required federal or state portal. We will provide support for grant management activities from application to closeout to ensure compliance with federal regulations and ensure all obligated funds were expended appropriately.

VistaTRAK offers comprehensive project-to-program status via real-time dashboards that provide users with instant access to performance data, or via flat-formatted e-mail reports sent on a defined frequency, as preferred. With automatic daily data updates, VistaTRAK enables real-time cloud-based custom reporting to give our clients and other stakeholders (as designated) on-demand access to the current state of all the projects in a single platform.

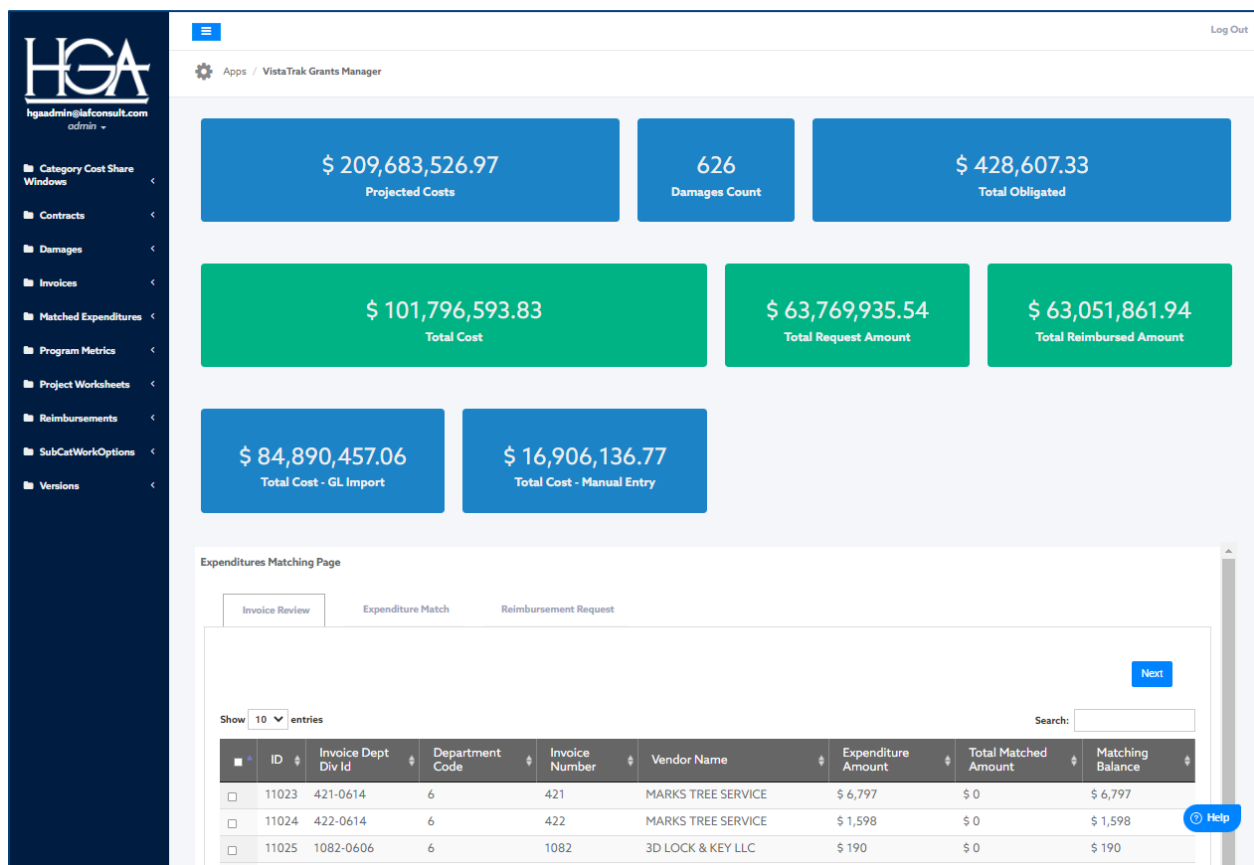


FIGURE 5: VISTATRAK’S REPORTING CAPABILITIES AT A GLANCE. VistaTRAK enables real-time, cloud-based custom reporting to give our clients on-demand access to the latest program information.

The HGA Team’s grant managers work hand in hand with client’s Finance Departments to track reimbursements, outstanding payments, and request for reimbursements. Our staff will work with LITACorp’s clients to ensure accountability and make suggestions in areas that may need improvement.

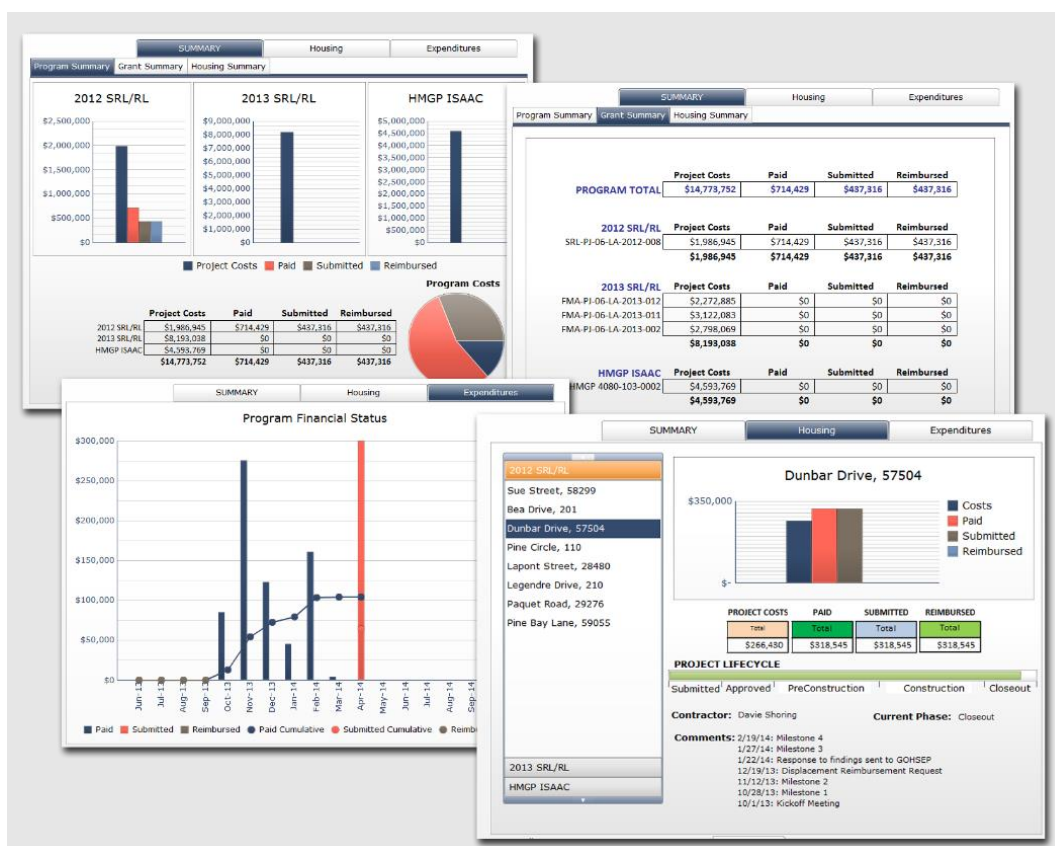


FIGURE 6: HGA TEAM PROJECT REPORTING AND TRACKING DASHBOARDS. *Using these customized dashboards, HU management can see the financial status of any project, or of the overall program, in real time.*

The HGA Team can use VistaTRAK to track and monitor all funding expended on the project. This will include a breakdown of funds dedicated to each project, along with all allowable project costs. We will establish cash flows and project forecasts based on earned progress with defined deliverable schedules. Our grant managers have extensive experience developing and implementing projects financed by federal funding sources. We will make every effort to ensure overall project compliance with requirements. Maintaining best practices policies and procedures for project implementation will show all project stakeholders that their funding is being used in the most efficient and effective manner possible. This in turn will promote the cooperation and buy-in from all stakeholders that are paramount to project success.

Area 3 Project Management Approach

HGA will provide overall management and coordination of a project, including management or coordination with Area 1, Area 2 and Area 4 staff. HGA’s project management experience and expertise ensure that project schedules are met. We utilize the most advanced project management programs to ensure visibility of key programmatic information, stakeholder responsibilities, and due dates. HGA will develop schedules in conjunction with LITACorp and its clients to ensure that all grant application due dates are met and compliance with all reporting milestones and requirements are achieved, and that federal reporting is done on time and correctly. HGA maintains a secure client portal within VistaTRAK that generates real-time schedule status updates, highlighting due dates or actions required by the relevant stakeholders. Having managed billions of dollars in grant funds, HGA understands the importance of complying with project schedules—and doing so is an integral part of our Program Management services.

Federal Funding Technical Assistance

HGA’s successful work has led to additional opportunities with the City of Lake Charles. We are helping the City to identify, apply for, and evaluate additional grant opportunities, including future HUD allocations, other FEMA funding opportunities, federal and state infrastructure grants, and relief from Hurricane Delta and the May 2021 floods. The objective of this technical assistance is to align opportunities for federal or state funding to achieve the City’s goals and to leverage all available grants to achieve greater outcomes.

HGA is an experienced contractor who can provide expeditious and comprehensive oversight management services in compliance with all regulations throughout the course of the program. We have proven this by leading the two largest infrastructure recovery programs that have been implemented to date—New York’s for Hurricane Sandy and Louisiana’s for Hurricanes Katrina and Rita. Figure 7 below illustrates the complexity of these programs. Notably, HGA’s IT solutions (VistaTRAK) earned a Finding of Merit from HUD for enhancing monitoring capacity and record-keeping in Louisiana’s recovery from Hurricanes Katrina and Rita. HGA will bring our vetted and customizable system, templates, and processes; lessons learned; success stories; and seasoned staff to best serve LITACorp and its clients.

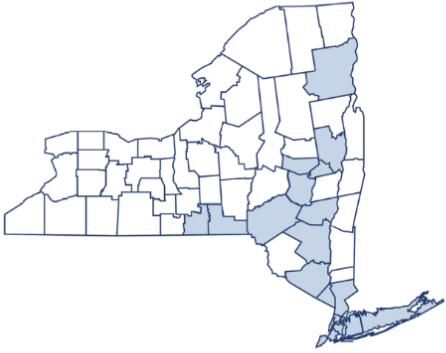

SANDY		KATRINA/RITA	
			
HGA Administered \$ -	\$1.3B	HGA Administered \$ -	\$1.4B
Number of Projects -	325	Number of Projects -	357
Counties Covered -	20	Parishes Covered -	23
Communities -	69*	Communities -	180
Area of Counties -	4,557 square miles	Area of Parishes -	18,372 square miles
* Many projects in NYC, one community.			

FIGURE 7: LARGE-SCALE INFRASTRUCTURE PROGRAM MANAGEMENT EXPERIENCE. *HGA is the only firm that has managed infrastructure recovery efforts of this complexity and size.*

HGA deeply values meeting with our clients. We want to develop a strong relationship with our partners, to encourage communication and build trust. Our staff are always available via phone or e-mail, but we prefer to meet face-to-face whenever possible. We can support all levels of meetings, from small department meetings discussing actions items and project tasks, to larger whole-government or council meetings to discuss program guidelines, establish client priorities, and answer questions. We plan to schedule and facilitate weekly meetings with client staff to provide updates on the status of the application development process. In later stages, will meet as desired to keep the client apprised of the status of both individual projects and the overall program status.

We will also attend, as requested, any and all meetings with state and federal agencies to further represent the client. HGA will serve in an advisory capacity at such meetings—deferring to our client, while continually providing back-up and support. Our presence can add weight in these meetings when clients are seeking guidance or input from the state and federal levels.

Our Team has worked with numerous clients on application development for federal grants. This experience helps us to provide superior technical assistance and support to clients as needed. We have worked to develop and implement a full scope of work from application to closeout. Therefore, our staff know the importance of applications for obtaining funding, and understand how getting the application right at the start makes the entire project flow more smoothly, with fewer problems. Our staff will work with the client, providing technical guidance or directly supporting the following areas, as desired:

- Developing project priorities that will produce effective outcomes.
- Developing concise and thorough scopes of work, including the development of projected line-item budgets.
- Performing a project's BCA and, if necessary, adjusting the project scope or budget to obtain the required benefit ratio.
- Reviewing a checklist of necessary components to ensure submittal of a complete application.
- Making all applications available in draft form at least two weeks prior to submission for client review and processing.
- Entering applications and support documentation into the grant portal, as applicable.

In addition to the reports we provide to LITACorp clients, we will also provide detailed and periodic staff and management reports to LITACorp to provide LITACorp with real-time status on all clients our Team is supporting. We proactively work with local, state, and federal elected officials to provide program information to disseminate to their constituents. Building these relationships among communication teams, elected officials, and staff opens the door to assisting constituents sooner and building general goodwill among those with a voice in the communities. Grant-funded programs often involve the support of other state and local agencies. To ensure effective coordination, it is important to consistently engage these agencies in program operations and tap into their expertise and resources.

Area 4 Professional Technical Support Approach

The HGA Team will provide design professionals including Louisiana licensed Engineers, Architects, or Interior Designers to assist with creating and submitting the designs and

specifications necessary to illustrate feasibility and costs required to successfully obtain grants. Please see Attachment 3: Résumés for qualifications of our proposed technical support professionals. We will also assist in-house or third-party Design Professionals hired to finalize and certify plans and specifications, oversee procurement processes, or oversee construction.

HGA has **provided procurement guidance to well over 100 grantees and subrecipients** over the past two decades, helping them to manage their processes compliantly. **HGA has supported more than 800 professional service procurements** by subrecipients over the last 15 years, with zero findings by HUD and zero funds recaptured. The HGA Team will determine if the LITACorp clients have adequate financial control policies in place, adopted procurement/purchasing guidelines, and that their processes are compliant or exceed federal standards. We will work seamlessly with client staff to ensure that development of requests for proposals, requests for qualifications, and invitations to bid are compliant with federal, state, and local regulations.

The HGA Team will work with each client to develop procurement documents that capture all required services. We will also ensure that the procurements attached to each project clearly reflect that the projects are IJA assisted, and will highlight any unique conditions that prospective vendors must consider when bidding.

Business References

HGA is not involved in any pending Securities Exchange Commission investigations. Below are the required business references that reflect HGA’s ability to deliver the RFP services. Please also see the section of this proposal entitled Summary of Experience beginning on page 10, where we have listed references for HGA and our subcontractors relevant to each of the four RFP Staffing Support Services Areas.

Organization	Contract Length	Summary of Work	Contact Person
NY Governor’s Office of Storm Recovery (GOSR)	May 2014–present	Hurricane Sandy Program Management for Infrastructure & Community Reconstruction \$1.3 billion CDBG-DR	Erin Waz, Managing Director, 60 Broad St., 26th floor NY, NY, 10004 (518) 248-6147 erin.waz@stormrecovery.ny.gov

Organization	Contract Length	Summary of Work	Contact Person
Louisiana Office of Community Development (OCD)	October 2007-2021	Hurricanes Katrina & Rita Program Management of Infrastructure Recovery \$1.4 billion CDBG-DR	Pat Forbes, Executive Director, P.O. Box 94095, Baton Rouge, LA 70804-9095 (225) 219-9600 Patrick.forbes@la.gov
Louisiana OCD	November 2019-present	Program Management and Staffing for Restore Louisiana Housing Assistance Program for 2016 Floods and Hurricanes Laura and Delta; Buyout Program \$1.3 billion CDBG-DR and \$87 million CDBG-MIT	Jeff Haley, Chief Operating Officer, 150 Third St., #200 Baton Rouge, LA 70801 (225) 341-2270 Jeff.Haley@La.gov
North Carolina Office of Recovery and Resiliency (NCORR)	June 2019-present	Staff Augmentation and Program Management for CDBG-DR and CDBG-MIT Housing and Infrastructure \$740 million CDBG-DR and \$168 million CDBG-MIT	Matt Arlyn, Planning and Policy Director, 512 North Salisbury Street Raleigh, NC 27604 (984) 232-3234 Matthew.Arlyn@ncdps.gov

Staff Commitments

The HGA Team is committed to providing our proposed key personnel for the full term of the contract. Please see the section of this proposal entitled Overall Approach for the Four Services Areas on page 42 for more information on our staffing plan and Attachment 3: Résumés.

ATTACHMENT 1: OPTIONAL MARKETING MATERIALS

Per the RFP we are including no more than two pages of marketing materials following this page.

VARIOUS LOUISIANA LOCAL GOVERNMENTS GRANT MANAGEMENT AND TECHNICAL ASSISTANCE CORONAVIRUS AID, RELIEF, AND ECONOMIC SECURITY ACT (CARES ACT)

CLIENT

Various Louisiana Local Governments

PROJECT TIMELINE

March 2020 - December 2020

SERVICES

- Environmental Review Records (ERRs)
- Grant Management
- Reimbursement Requests
- Technical Assistance

CLIENT POINT OF CONTACT

David Wm. Rigdon
Chief Civil Deputy
Franklin Parish Sheriff's Office
6556 Main Street
Winnsboro, LA 71295
(318) 435-4505

Joseph Moreau
Parish Manager
East Feliciana Parish
12064 Marston St.
Clinton, LA 70722
(225) 719-1962
efeoc@outlook.com

Hunt, Guillot & Associates, LLC

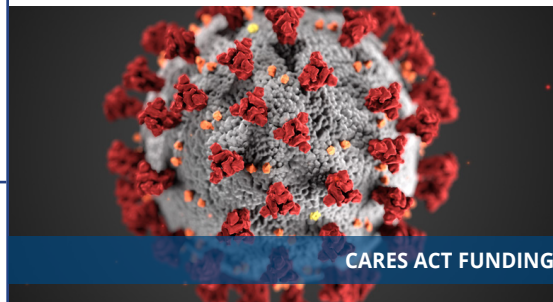
(866) 255-6825 www.hga-llc.com

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OVERVIEW

The Coronavirus Aid, Relief, and Economic Security Act (the CARES Act) is legislation that was passed by the U.S. Congress on March 27, 2020. The CARES Act provides over \$2 trillion in emergency relief funding to those impacted by the coronavirus pandemic. It's meant to keep business owners, governments, and individuals afloat as a result of the unprecedented freeze of the American economy. The State of Louisiana set aside a portion of its CARES allocation for local governments and agencies that would access the dollars through an application process managed by the State Office of Community Development.

7 Parishes | 4 Municipalities



SOLUTION

■ **Build Baton Rouge** — HGA provided technical assistance to the City-Parish in their administration of the CARES ACT funding allocated through HUD entitlement programs including Community Development Block Grant (CDBG-CV), HOME Investment Partnerships (HOME-CV), Emergency Solutions Grants (ESG-CV), and Housing Opportunities for Persons with AIDS (HOPWA-CV). HGA assisted with development of the NOFA public notice, project application, technical assistance packet to accompany the application, and scoring sheet. We also held a training session for the proposal evaluation committee members selected by the City-Parish. HGA is currently assisting with the environmental review records (ERRs) for the awarded projects.

■ **Town of Abita Springs | Catahoula Parish Sheriff's Office | East Carroll Parish Sheriff's Office | East Feliciana Parish | Franklin Parish Sheriff's Office | Grant Parish Sheriff's Office | Morehouse Parish Sheriff's Office | Richland Parish Police Jury | Town of Oak Grove | Town of Mangham Police Department | Town of Delhi Police Department** — HGA assisted seven parishes and four municipalities in the preparation and submission of CARES Act funding reimbursement requests to the State of Louisiana Office of Community Development. HGA prepared ten applications for assistance and served as the liaison between the applicants and the State for the duration of the submission and review process. With the assistance of HGA, these applicants received a total of \$8 million in CARES reimbursements. Costs eligible for reimbursement included employee payroll, hazard pay, operations expenses, and purchase of supplies and equipment used to respond to COVID-19.

STATE OF NORTH CAROLINA PROJECT MANAGEMENT HUD CDBG-DR AND CDBG-MIT HOUSING AND INFRASTRUCTURE



CLIENT

North Carolina Office of Recovery and Resiliency (NCORR)

PROJECT TIMELINE

June 2019 - Present

PROGRAM VALUE

\$740 million CDBG-DR
\$168 million CDBG-MIT

SERVICES

- Staff Augmentation
- Action Plan Development (DR & MIT)
- Compliance & Monitoring
- DRGR Support & Maintenance
- Environmental Consulting & Reviews
- Policy & Procedure Development & Maintenance
- Reporting & Dashboard Development
- URA & TRA Consulting

CLIENT POINT OF CONTACT

Matt Arlyn
Planning and Policy Director
NCORR
512 North Salisbury Street
Raleigh, NC 27604
(984) 232-3234
matthew.arlyn@ncdps.gov

Hunt, Guillot & Associates, LLC
(866) 255-6825 www.hga-llc.com

OVERVIEW

HGA has been providing NCORR with expert staff to support planning, operations, and compliance for all of its recovery programs. More specifically, HGA has helped NCORR to develop program policies and procedures that will help NCORR to remain compliant in all federal cross-cutting statutes. HGA will also help NCORR to implement other industry-wide best practices to ensure overall grant compliance. HGA has become an invaluable trusted advisor to NCORR, working in tandem with the agency to achieve a common goal: helping the State's communities recover from the damages inflicted by successive storms.

SOLUTION

Action Plan Support. With HGA's help, NCORR was the first grantee to submit a complete, accepted CDBG-MIT Certification, Implementation Plan, and Action Plan for CDBG-MIT funding. In support of the CDBG-MIT Action Plan, our staff also conducted the unmet needs analysis and its underlying research and conducted three regional presentations and citizen participation forums. Our team also developed the unmet needs assessment and original Action Plan for Hurricane Florence, and before that, Substantial Action Plan Amendment #5 for Hurricane Matthew.

Policy and Procedure Development. HGA is working to prepare for program operationalization and start-up. Our team is developing policies and procedures for all new recovery programs. The team has also performed strategic planning in concert with NCORR and vendor staff to identify areas most at risk for future storm damage.

Compliance and Monitoring. Working with NCORR, HGA developed and implemented the monitoring and compliance plans for four different NCORR programs. HGA developed program-specific checklists, sampling, and other tools to ensure that both State programs and subrecipient-administered programs would function within federal requirements and in compliance with the program's policies.

Buyout Program. HGA has been instrumental in setting up NCORR's Buyout Program by establishing the foundational cross-cutting policies needed for program development, and by developing buyout policies, procedures, offer methodologies, process flow, public outreach planning, Disaster Risk Reduction Area identification and mapping, and subject matter expertise. NCORR's Buyout Program will be funded with both CDBG-DR and CDBG-MIT funding.

Environmental Reviews. HGA has reviewed current environmental processes and procedures and recommended ways to improve efficiencies and compliance. We have also provided additional capacity to review and approve Tier II environmental reviews as they are completed by program contractors.

DRGR and Financial Support. We are completing all required regulatory reporting for the State's Disaster Recovery Grant Reporting (DRGR) system. Our team helped to streamline and implement processes to ensure compliance and efficiency in both financial management and DRGR reporting. Our team has also been tasked with reviewing the Finance Management Manual, as well as creating billing guides and checklists for subrecipients and vendors.

ATTACHMENT 2: CONTRACT EDITS

HGA has reviewed Attachment VI: Sample Generic Contract of the RFP and proposes the following revisions for LITACorp's consideration:

- Indemnity—would like fault based and reciprocal
- Limit of Liability—remove exclusions
- Payment Terms—within 30 days

ATTACHMENT 3: RÉSUMÉS

Manager-Principal—Jack Hunt

Project Managers—Matt Brickey (primary); Jim Voitier (secondary); Jamie Seal, CFM; Edward Anthony, III, PMP

Grant Managers—Candice Mahoney; Kim Ryals, CFM; Suzie Sumpter, CFM; Bill Blankenship, CFM; Quez Jones, Beckie Northrop, Michelle Smith, Anna Roberts, Jacob Reeves, Christina Wilson

Grant Writers—Catherine Sumpter, Jessica Campo, Kris Van Orsdel, Zachary Gibbons, Christy Odgen

Engineer/Architect—Christopher Jeanice, Jacob Donnes, Jacob Loeske, John Plaisance, Joshua Gonya, Kevan Keiser, Mohan Menon, Deric Murphy, PE; Jay LeBlanc, Jr., PE; William Purser, PE; Rebecca Lala, PE, PTOE; Yunxiang Fan, PE; Yangbin Tong, PE; Jacob Murray, EI

Other Licensed Design / Certified Professionals—Vincent Orlando, PE; Mason Bonano, PE; Aaron Brown



12 Years of Experience

AREAS OF EXPERTISE

- Program/Project Management
- Disaster Recovery
- FEMA Hazard Mitigation Assistance (HMA)
- FEMA Public Assistance (PA)
- HUD Community Development Block Grant–Disaster Recovery (CDBG-DR)
- U.S. Department of the Treasury COVID-19 Relief Programs

EDUCATION

- M.B.A., Finance and Energy, Tulane University Freeman School of Business, 2010
- B.S., Chemistry, Louisiana State University, Baton Rouge, LA, 2005

HIGHLIGHTS

- ✓ Has overseen grant programs worth more than \$1 billion.
- ✓ Understands the regulations surrounding federal grant programs and other funding sources; has the experience needed to leverage this funding to provide a comprehensive recovery solution for communities.
- ✓ Provided program management for the NY State CDBG-DR Infrastructure Recovery Program, NY State CDBG-DR Public Assistance Match Program, and HGA’s Construction Management Support Services (CMSS) contract with NY State, which provided final inspections and change orders for NY State’s Housing Recovery Program.
- ✓ Managed housing and infrastructure recovery programs for 16 disasters, comprising hundreds of subrecipients.

RELEVANT PROJECT EXPERIENCE

Executive Sponsor, Louisiana Office of Community Development (LA OCD), Restore Louisiana Housing Assistance Program—HGA, Baton Rouge, LA, November 2019–present

- Serves as the Executive Sponsor for program management services provided to LA OCD for the Restore Louisiana Housing Program, overseeing the contract and ensuring that all deliverables meet the highest standards of quality.

Executive Sponsor/Project Manager, Puerto Rico Department of Housing (PRDOH), Oversight, Monitoring, Compliance, and Staff Augmentation Services—HGA, San Juan, PR, June 2019–June 2021

- Serves as the HGA Executive Sponsor/Project Manager for staff augmentation services provided to prime contractor Horne in support of PRDOH’s CDBG-DR programs, including housing, infrastructure, and FEMA match.
- Responsible for ensuring that all contractual deliverables are met with the highest standards of quality.

Executive Sponsor/Project Manager, North Carolina Office of Recovery and Resiliency (NCORR), HOPE Rental and Utility Assistance Program—HGA, Raleigh, NC, November 2020–present

- Serves as the HGA Executive Sponsor for this CDBG-CV, COVID-19 Relief Fund (CRF), and American Rescue Plan Act (ARPA)-funded rental and utility assistance program, overseeing the

PROFESSIONAL AFFILIATIONS

- Louisiana Association of Business and Industry (LABI), Young Leaders Council Member

contract and ensuring that all deliverables meet the highest standards of quality.

Executive Sponsor/Project Manager, North Carolina Office of Recovery and Resiliency (NCORR), Staff Augmentation Services—HGA, Raleigh, NC, May 2019–present

- Serves as the HGA Executive Sponsor/Project Manager for staff augmentation services to NCORR.
- Responsible for providing staff augmentation personnel including CDGB-DR Subject Matter Experts, Environmental Specialists, Disaster Recovery Grant Reporting (DRGR) System Specialists, QA/QC Specialists, Uniform Relocation Act (URA)/Temporary Relocation Assistance (TRA) Experts, Infrastructure Experts and Buyouts/Acquisition Experts.
- Responsible for ensuring that all contractual deliverables are met with the highest standards of quality.

Program Manager, LA OCD, Restore Louisiana Housing Assistance Program—HGA, Baton Rouge, LA, October 2017–December 2019

- Served as the HGA Program Manager for inspection services provided to LA OCD for the Restore Louisiana Housing Program.
- Oversaw the contract and ensured that all deliverables meet the highest standards of quality. HGA deliverables are accepted by customers as compliant and correct at a rate exceeding 99%. Customers return less than 1% of deliverables with a request for minor adjustments, which are made promptly and studied to prevent future issues.

Engagement Partner/Program Manager, NYS Governor's Office of Storm Recovery (GOSR), CDBG-DR Recovery Programs—HGA, New York, NY, May 2014–present

- Serves as the HGA Program Manager for the NYS GOSR Community Reconstruction (CR) and Infrastructure Recovery Program and the Construction Management Support Services (CMSS) contract for the Housing Recovery Program.
- The CR and Infrastructure Recovery Program consists of \$1.2 billion in CDBG-DR funding, with more than 300 infrastructure projects across 50 local NY governments.
- The Infrastructure Recovery Program includes multiple FEMA HMGP Global Match projects, a FEMA PA Match program, and Rebuild by Design projects.
- The CMSS for the Housing Recovery Program provides housing inspections and change order/clarifications, with well over 6,000 inspections and change orders/clarifications performed to date.

Project Manager, Plaquemines, St. Bernard, and St. Tammany Parishes, Hazard Mitigation Grant Program—HGA, Baton Rouge, LA, April 2013–April 2014

- Managed over \$150 million in HMGP and HMA funding for several Louisiana parishes, with total project costs of \$200 million. Projects included housing programs for more than 400 elevations/repairs and 24 infrastructure improvements.

Project Controls Manager, New York City Rapid Repairs Program—The Shaw Group, New York, NY, November 2012–April 2013

- Managed all databases, reporting, and scheduling for the New York City Rapid Repairs Program—a first-of-its-kind \$600 million program to provide sheltering-in-place for homeowners affected by Hurricane Sandy.
- Managed more than 50 people from four different contractors to accomplish program reporting goals.
- Delivered all program reporting, including daily reports for New York City Mayor.
- Integrated schedules from 11 general contractors to develop the program master schedule.

Project Control Manager, LA OCD, HMGP—The Shaw Group, Baton Rouge, LA, May 2011–February 2012

- Provided business management, change control, cost management, and reporting for a \$750 million mitigation grant program for individual homeowners.

Project Controls Manager, LA Coastal Protection and Restoration Authority, Barrier Berm Restoration—The Shaw Group, New Orleans, LA, May 2010–April 2011

- Provided reporting, scheduling, change control, and financial analysis for this \$260 million project to protect Louisiana’s coast by rebuilding barrier islands (in response to the BP Deepwater Horizon oil spill). It included the largest dredging fleet on a single project in U.S. history, which built more than 15 miles of berm in less than nine months.

RELEVANT EMPLOYMENT HISTORY

- HGA, April 2013–present
- The Shaw Group, May 2010–April 2013

Matt Brickey

Primary Project Manager



23 Years of Experience

AREAS OF EXPERTISE

- Federal Grant Funding
- Project Management
- Infrastructure
- Logistics
- Supply Chain Management
- Strategic Planning
- Budgeting
- Construction Management
- Process Improvement

EDUCATION

- B.S., Business Administration, UT Knoxville, Knoxville, TN, 1998

HIGHLIGHTS

- ✓ Provides assistance to local governments with securing Infrastructure Investment and Jobs Act (IIJA) funding, American Rescue Plan Act (ARPA), and other available funding.
- ✓ Assists local governments with compliance and reporting on grant-funded programs.
- ✓ Versatile and results-driven management professional with diverse expertise in all facets of logistics, global operations, supply chain, budgeting and cost control, construction management, consultative sales, and project execution.
- ✓ Adept in crafting innovative solutions that optimize processes and profitability.
- ✓ Trusted advisor and management consultant with a proven record of delivering strategic actions plans.

RELEVANT PROJECT EXPERIENCE

Lead Project Manager, Infrastructure Investment and Jobs Act (IIJA) Grant Funding, Baton Rouge, LA, 2022–present

- Completed Safe Streets for all Grant Application for the City of Lake Charles and Town of Abita Springs
- Completed Reconnecting Communities Grant Application for City of Lake Charles
- Completed Rural Surface Transportation Grant Application for St. Landry Parish
- Completed Thriving Communities Letter of Interest for the Delta Regional Agriculture and Sustainability District

Infrastructure Grant Project Manager, Lake Charles and Baton Rouge, LA, 2022–present

- Leads the planning and implementation of projects, defining project scope, goals, and deliverables.
- Defines project tasks and resource requirements, and develops full-scale project plans.
- Prepares High Level Budget with overview of estimated activity costs organized by all major cost elements
- Prepares Key Information and Project Narrative with Quantitative data for Infrastructure Grant Applications
- Completes all Standard Required Application and Program Specific Forms and Information

EMPLOYMENT HISTORY

- HGA, 2021–present
- Total E&P Mozambique, 2021
- 3Energy Services, LLC, 2014–2021
- Jacobs Engineering Group, 2012–2014
- CEVA Logistics, 2005–2012
- Marathon Oil Corporation, 2002–2005
- Schlumberger, 1998–2002

Project Manager, American Rescue Plan Act (ARPA) Ouachita Parish, Baton Rouge, LA, 2022–present

- Develops policies and procedures for all aspects of the Parish ARPA program. Ensures program compliance with all ARPA requirements.
- Monitors program regulations to maintain compliance with federal requirements.
- Manages program communications during eligibility and implementation phases.
- Tracks expenditures for all aspects of the program.
- Prepared quarterly reports and guided development and review of program plans and eligibility.

Project Manager, Broadband Projects for East Feliciana and Ouachita Parishes, Baton Rouge, LA, 2022–present

- Provides broadband assessment reports and technical data
- Lead and support Granting Unserved Municipalities Broadband Opportunities (GUMBO) program
- Facilitates provider partners and organize meetings to review potential service offerings that can possibly be leveraged

Construction Coordinator, Afungi Site—Total E&P, Palma, Mozambique, January 2021–April 2021

- Led, developed, and empowered 12 cross-functional personnel.
- Designated liaison between the 10-member site management team, liquefied natural gas (LNG) contractors, social/environmental leads, and port authority.
- Strengthened relations with the engineering, procurement, construction, and installation (EPCI) contractor for pull-in and tie-in operations at the beach landing, as well as the offshore pipeline.

Logistics Consultant, COVID-19 Support—3Energy Services, LLC, New Orleans, LA, April 2020–2021

- Selected by a federal contractor to direct Covid-19 support for a temporary hospital with more than 2000 staff in New Orleans, LA.
- Provided expertise in logistics, staffing, policies, protocols, and standard operating procedures.

Logistics Consultant, Relocation Strategy—3Energy Services, LLC, Baton Rouge, LA, June 2014–April 2020

- Ideated the relocation strategy for a \$60 billion publicly traded company.

- Oversaw the decommissioning and transportation of 13 production lines.
- Rolled out an asset tracking system to bolster accountability, resulting in 30% cost savings in re-assembly and receiving.

Senior Logistics Manager, Production Plant Relocation Projects—Jacobs Engineering, Baton Rouge, LA, July 2012–June 2014

- Instrumental in logistics management and material control for two production plant relocation projects from Punta Arenas, Chile to Geismar, Louisiana.
- Crafted and integrated material control processes, instituting asset tracking and export packing methods to capture data in order to clear U.S. customs and import control.
- Directed and motivated 50+ logistics team members and heavy haul providers to deliver a transportation solution for 44 modules, comprising of 12 rack modules and both bulk and container plant equipment.
- Secured contracting and ocean transport for modules and heavy lift refining columns worth more than \$25 million.

Global Account Director—CEVA Logistics, Houston, TX, December 2009–July 2012

- Primary leader of new global account management and business development, with emphasis on client relations management and quality service standards.
- Defined target key performance indicators (KPIs), ideated sales and marketing initiatives, streamlined strategy and execution, and coordinated all operational process meetings.
- Developed standard operating procedures (SOPs) for global accounts.
- Oversaw and mentored five cross-functional employees in new business development and growth positioning.
- Catapulted new business revenues by \$18 million+ in three years.
- Accomplished 60%+ year-over-year (YOY) net growth through superior client relations management, overachieving on target goals.
- Created resource material on SOPs to facilitate training of 25 global personnel.

Station Manager— CEVA Logistics, New Orleans, LA, January 2006–December 2009

- Advanced strategic initiatives to produce growth in revenues and overall profitability. Provided full profit and loss accountability and was the final authority on operational decisions.
- Supervised and equipped 25 cross-functional staff with oversight of \$9 million annual budget.
- Sourced, selected, on-boarded, and trained 80% of the unit team.
- Propelled annual revenues by more than 32%, profits by more than 27%, and achieved earnings before interest, taxes, and amortization (EBITA) of more than 98%.

Jim Voitier

Secondary Project Manager



14 Years of Experience

AREAS OF EXPERTISE

- Disaster Recovery
- Business Operations Analysis
- Financial Forecasting
- Project Management
- Environmental Consulting

EDUCATION

- B.S., Environmental Science, Sewanee: The University of the South, Sewanee, TN, 2008

HIGHLIGHTS

- ✓ **More than 14 years** of experience.
- ✓ **Managed \$100 million** in economic revitalization program for small businesses impacted by Hurricane Harvey.
- ✓ **Assisted with approximately** 325 employees responsible for a portfolio of approximately 600 programs and projects.
- ✓ **Implemented groundbreaking solution** that has quickly become a common model for business grants processing and disbursement programs
- ✓ **Developed expertise in environmental consulting**, with emphasis on real estate transactions involving contaminated properties, and an additional focus in Brownfields grant administration.
- ✓ **Environmental Manager over a \$1 billion** natural gas power plant construction project.
- ✓ **Strong track record of project work** including service as Operations Chief for the New Orleans’s Convention Center’s COVID-19 care facility.

RELEVANT PROJECT EXPERIENCE

Project Manager, three separate FEMA Private Property Debris Removal Programs, Lafourche Parish Government, Cameron Parish Policy Jury, City of Lake Charles—HGA, Baton Rouge, LA, October 2022–present

- Leads grant subrecipient’s PPDR program.
- Ensures grant compliance requirements are maintained within the program and project work falls within FEMA’s reimbursement eligibility standards.
- Established communication system to interface with private property owners.
- Manages a team of approximately 10 in-house professionals and 7 subcontractors.
- Maintains open and frequent communication and reporting with Parish/Municipal representatives and FEMA officials.

EMPLOYMENT HISTORY

- HGA, March 2021–present
- Excel Contractors, Project Manager, March 2020 – March 2021
- Aptim, f/k/a CB&I, f/k/a The Shaw Group, September 2008 – March 2020

Project Manager, Texas General Land Office (GLO), Texas Back in Business (TBIB) Small Business Grant Program—HGA, Baton Rouge, LA, February 2021–present

- Oversees \$100 million economic revitalization program for small businesses impacted by Hurricane Harvey, which is part of the Hurricane Harvey Relief Program
- Program provides small business applicants with grants ranging from \$50,000–\$250,000 to retain and create jobs for low- to moderate-income persons.
- Leads a team of eligibility case managers.
- Establishes first contact with Program applicants to gather required eligibility documentation and walk them through the grant application process.
- Guides applicants with Program-required forms and assists them with understanding basic eligibility requirements.
- Developed processes and procedures for efficient intake and document management that comply with personally identifiable information (PII) security protocols and result in quick processing of applicants.
- Encourages reliable and empathetic outreach with an emphasis on customer service.
- Oversees team use of software tools to track and manage outreach efforts, including team’s software solution that records, tracks, and assigns ownership to every phone call, voicemail, and e-mail that passes through the Program’s queue.

Senior Project Management Specialist, Multiple State and Local Government Divisions—Aptim, Baton Rouge, LA, December 2017–March 2020

- Assisted with approximately 325 employees responsible for a portfolio of approximately 600 programs and projects. These projects consisted of program and construction management, disaster consulting, and coastal and flood control engineering.
- Coordinated actions within the business segments at the direction of the Division Vice President and Evaluated needs at the business-line level and elevated ideas, issues, and planning strategies.
- Developed and analyzed financial dashboards and augmented leadership bandwidth at the Director level.
- Conveyed executive directives, mediated staff disputes, connected geographically dispersed personnel, oversaw project status reviews, advised VP and other executives on staff- and project-level concerns and opportunities, and identified organizational and process gaps.

- Advised project managers on project execution, developed budgets for projects and for Division, and supported business-line managers by presenting best practices for operating business lines and executing budgets.

Environmental Manager, Entergy St. Charles Power Construction Project—Aptim, Laplace, LA, May 2017–December 2017

- \$1 billion natural gas power plant construction project.
- Served as Environmental Manager, overseeing environmental regulatory compliance for this project.
- Supported construction management to achieve environmental compliance objectives.
- Delivered accurate and on-schedule regulatory reports and permitting deliverables on behalf of the Construction Director.
- Identified project gaps and educated Construction Managers regarding risks and actionable mitigation measures.
- Guided construction staff in establishing sustainable and repeatable environmental compliance practices.
- Responsible for facilitating corporate audits of the Project's environmental program, as well as assigning, implementing, and revisiting corrective actions.

Environmental Advisor, Sempra, Cameron Liquefied Natural Gas (LNG) Liquefaction Construction Project—CB&I, August 2014-May 2017

- \$10 billion project with a workforce of 12,000.
- Under direction of the Project Environmental Manager, supported construction management to achieve client- and agency-driven environmental compliance objectives.
- Supervised and conducted environmental inspection and regulatory reporting activities.
- Managed hazardous and non-hazardous wastes, supervised Federal regulatory compliance and reporting, and conducted storm water management.
- Wrote and delivered environmental training to multiple audiences, including craft, field supervision, and executive management.
- Coordinated with front-line supervision to prevent and resolve non-compliance and ensured in-the-field policy compliance.
- Reviewed, interpreted, and applied relevant environmental regulations.
- Conducted field inspections of construction work fronts.
- Supervised and reviewed peer work.
- Oversaw wildlife management and relocation.

Environmental Scientist, Multiple Projects—The Shaw Group, Baton Rouge, LA, September 2008–August 2014

- Conducted pre-acquisition due diligence and environmental business risk assessment.
- Wrote remediation plans, bid packages, and consultant selection schemes.
- Interfaced with State and Federal regulators.

- Interpreted technical data and rendered professional opinions and evaluated and critiqued technical reports.
- Developed expertise in environmental consulting, with emphasis on real estate transactions involving contaminated properties, and an additional focus in Brownfields grant administration.

Candice Mahoney

Grant Manager



15 Years of Experience

AREAS OF EXPERTISE

Disaster Recovery

HUD Community Development Block Grant–Disaster Recovery (CDBG-DR)

Grant Management

Compliance and Reporting

Environmental Reviews

Community Development Block Grant (CDBG) Entitlement

Emergency Solutions Grants (ESG) Program

Housing Opportunities for Persons with AIDS (HOPWA)

HOME Investment Partnerships Program (HOME)

EDUCATION

- M.A., Healthcare Administration, University of Houston at Clear Lake, Houston, TX, 2009
- B.S., Political Science, Louisiana State University, Baton Rouge, LA, 2003

HIGHLIGHTS

- ✓ **15 years of experience with CDBG rules and regulations**, to include policy development for local government and preparing HUD Environmental Review Records.
- ✓ **Led development of CDBG-DR Hurricane Isaac Action Plan** and performed DRGR reporting for St. Tammany Parish.
- ✓ **Administered over \$20 million in CDBG grants** within five years for a Louisiana parish.
- ✓ **Administered over \$100 million in HUD programs for local government**, which included ensuring compliance with CDBG regulations and submitting requests for payment.
- ✓ **Prepared HUD Environmental Assessments** for public facilities and multi-family housing projects for local governments.
- ✓ **Prepared Tier 1 broad-level reviews** for large-scale disaster recovery housing rehabilitation and replacement projects on county and state level.
- ✓ **Completed over 1,000 Tier 2 site-specific reviews** for scattered-site housing demolition and rehabilitation projects.
- ✓ **Experienced HUD HEROS** Partner user.

RELEVANT PROJECT EXPERIENCE

Senior Grant Manager, City-Parish of East Baton Rouge, CDBG Administrative Management—HGA, Baton Rouge, LA, January 2018–present

- Develops policies and procedures for all aspects of the City-Parish entitlement program. Ensures program compliance with all CDBG requirements.
- Develops the Section 504 Compliance Plan, Section 3 Compliance Plan, Subrecipient Management Plan, Rehabilitation Program policy, CDBG procurement policy, and CDBG/CDBG-DR administrative policies.
- Assisted with development of CDBG-DR Action Plan.
- Prepares Environmental Review Records for housing and infrastructure projects.
- Helps to complete Consolidated Annual Performed Evaluation Report (CAPER) end-of-year reporting for all entitlement funds.
- Provides technical assistance on the HOME Investment Partnerships Program (HOME), CDBG, Housing Opportunities for Persons with AIDS (HOPWA), and Emergency Solutions Grants (ESG) programs.

TRAINING

- FEMA BCA Toolkit Version 6.0 Training
- HUD Environmental Reviews, HUD, 2011
- Basically CDBG, National Community Development Association, 2009
- HUD Building HOME Series
- HUD HOPWA Oversight
- HUD Environmental Assessment Factors

EMPLOYMENT HISTORY

HGA, 2015–present

St. Tammany Parish Government,
2009–2014

Senior Grant Manager, City-Parish of East Baton Rouge, Emergency Rental Assistance Program—HGA, Baton Rouge, LA, March 2021–present

- Develops policies and procedures for all aspects of the Emergency Rental Assistance Program.
- Monitors program regulations to maintain compliance with federal and state requirements.
- Provides technical assistance to clients.

Grant Manager, Build Baton Rouge, HUD Environmental Reviews and Administrative Management—HGA, Baton Rouge, LA, January 2018–present

- Prepares Environmental Review Records for housing, infrastructure, and public service projects.
- Supporting CDBG-CV, HOPWA-CV, and ESG-CV allocations to Baton Rouge through the Coronavirus Aid, Relief, and Economic Security Act.

Senior Grant Manager, Texas General Land Office, Texas Back in Business Program—HGA, Baton Rouge, LA, February–April 2021

- Managed applicant communications during program transition and implementation phases.
- Prepared site-specific environmental review records.

Senior Grant Manager, City of Gretna, CDBG Administrative Management—HGA, Gretna, LA, January 2016–December 2020

- Developed policies and procedures for all aspects of the CDBG program. Ensured program compliance with CDBG requirements.
- Ensured cost reasonableness of change orders and contract amendments.
- Prepared final project completion and monitoring reports.

Senior Grant Manager, Plaquemines Parish, CDBG-DR Housing Assistance Program—HGA, Plaquemines Parish, LA, 2015–2020

- Prepared Environmental Review Records for 175 properties.
- Provided technical assistance to low-income applicants before, during, and after construction.
- Tracked expenditures for all aspects of the program.

Senior Grant Manager, Jefferson Parish, LA, Hurricanes Katrina, Rita, Gustav, and Ike CDBG-DR Infrastructure Programs—HGA, New Orleans, LA, 2015–2020

- Coordinated project schedules from environmental clearance through engineering and construction administration.
- Prepared monthly status reports and guided development and review of plans and specs.

Grants Project Manager, St. Tammany Parish Government, 2009–2014

- Provided fiscal administration of CDBG entitlement and CDBG-DR funds for Parish government.



16 Years of Experience

AREAS OF EXPERTISE

- Disaster Recovery
- FEMA Hazard Mitigation Assistance (HMA) Programs, including Hazard Mitigation Grant Program (HMGP), Federal Mitigation Assistance (FMA), and Building Resilient Infrastructures and Communities (BRIC)
- FEMA Non-Disaster (Preparedness) Grant Programs
- FEMA Public Assistance (PA) Programs
- HUD Community Development Block Grant-Disaster Recovery (CDBG-DR) Programs
- Grant Application Development
- Benefit-Cost Analysis (BCA)

EDUCATION

- M.S., Business Administration and Management, University of Phoenix, 2013
- B.S., Business Management, University of Phoenix, 2010

HIGHLIGHTS

- ✓ **Certified Floodplain Manager with 16 years of experience** performing project management services for FEMA Hazard Mitigation and Non-Disaster Grant programs.
- ✓ **Worked directly with grant homeowners and vendors on a daily basis** for approximately 11 years regarding elevations, acquisitions, and mitigation reconstructions.
- ✓ **Worked in emergency management since 2006** with the State of Louisiana, Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), GrantWorks, Quality Engineering & Surveying, and HGA.
- ✓ **Provided technical assistance with audit defense.**
- ✓ **Compiled documents for closeout audits.**
- ✓ **Performed reconciliation and accounting for eligible grant expenditures.**
- ✓ **Successfully supervised the development of more than 180 project applications** in excess of \$360 million in newly approved and awarded grant applications for several parishes across Louisiana.
- ✓ **Supervised the development of more than 100 amendments** worth more than \$90 million.
- ✓ **Helps local communities prepare and manage federal grant applications** and awards.
- ✓ **Familiar with rules and regulations for all FEMA Hazard Mitigation Assistance programs** and the Public Assistance Program.

RELEVANT PROJECT EXPERIENCE

Senior Grant Manager, Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), Program Management Assistance for Stafford Act – HMGP for Subrecipients—HGA, Baton Rouge, LA, April 2022–present

- Provides technical assistance and benefit-cost analysis (BCA) assistance to Iberia Parish and Vernon Parish for damages from Hurricane Ida.
- Developing HMGP applications for Vernon Parish for wind retrofit and generator projects.
- Monitors all application development and coordinates between Parishes and HGA.

CERTIFICATIONS

- Certified Floodplain Manager (CFM), Association of State Floodplain Managers, 2019

PROFESSIONAL AFFILIATIONS

- Louisiana Floodplain Managers Association (LFMA), Member
- Association of State Floodplain Managers (ASFPM), Member

TRAINING

- FEMA BCA Toolkit Version 6.0 Training

FEMA Emergency Management Institute (EMI) Courses

- IS-1000 Public Assistance Program and Eligibility
- IS-212.b Introduction to Unified Hazard Mitigation Assistance (HMA)
- IS-253.a Overview of FEMA Environmental and Historic Preservation Review
- IS-273 How to Read a Flood Insurance Rate Map
- IS-274 How to Use a Flood Insurance Study (FIS)
- IS-321 Hurricane Mitigation Basics for Mitigation Staff
- IS-322 Flood Mitigation Basics for Mitigation Staff
- IS-393.b Introduction to Hazard Mitigation
- IS-727 Floodplain Management and Protection of Wetlands
- IS-1014 Integrating 406 Mitigation Considerations into Your Public Assistance Grants
- IS-1100.a Increased Cost of Compliance
- IS-1117 Severe Repetitive Loss for Agents

Senior Project Manager, Tangipahoa Parish Government, Hazard Mitigation Assistance—Quality Engineering & Surveying, LLC, Baton Rouge, LA, November 2017–April 2022

- Worked with Tangipahoa Parish to ensure compliance with program requirements.
- Provided technical assistance with audit defense, supported reconciliation and accounting for eligible costs, and gathered supporting documentation for awards to ensure audit-quality closeout files.
- Monitored the progress of 25 projects to ensure that all federal and state grant requirements were met and that files were closed within the approved Period of Performance (POP).
- Provided weekly reports to the client and to Quality management regarding task work, deliverables, and project status.

Point of Distribution (POD) Lead, Louisiana Office of Community Development (OCD), Restore Louisiana Housing Assistance Program—IEM, Baton Rouge, LA, June–November 2017

- Managed workflow for 20 employees, creating team schedules, delegating tasks, and prioritizing cases per OCD rules and regulations.
- Assessed work performance of employees and identified areas that needed improvement.
- Ensured that goals, deadlines, and performance standards were met.
- Met with management weekly to update status of cases, employees, and the program.

Disaster Relief Manager, Grantworks, Inc., Rouge, LA, August 2016–June 2017

- Provided technical assistance to communities on the full spectrum of FEMA mitigation grant programs and Public Assistance grant programs.

State Applicant Liaison (SAL) Team Leader, Hazard Mitigation Program, Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), Baton Rouge, LA, October 2011–July 2016

- Led a team of three State Applicant Liaisons in providing technical assistance to Hazard Mitigation (HM) applicants on Vernon Parish and the full spectrum of FEMA mitigation grant programs.
- Organized and prioritized workloads, monitored the progress of all Hazard Mitigation projects, and provided weekly updates to the Section Chief.

EMPLOYMENT HISTORY

- HGA, April 2022–present
- Quality Engineering & Surveying, LLC, November 2017–April 2022
- IEM, June–November 2017
- Grantworks, Inc., August 2016–June 2017
- GOHSEP, May 2006–July 2016

- Maintained all Hazard Mitigation grant schedules and ensured that the three SALs on the team had sufficient work.
- Facilitated conversations between local and federal government agencies, using negotiation skills to obtain project approvals.
- Reviewed cost analyses of funds to ensure that they met the guidelines for cost reasonableness.
- Maintained high customer service standards and a high level of professionalism when performing these duties.

Non-Disaster Grants Team Leader, GOHSEP, Baton Rouge, LA, May 2006 Year–October 2011

- Provided guidance and oversight to my team, and provided technical assistance to applicants statewide.
- Developed and presented learning tools at the Unified Hazard Mitigation Assistance Summit.
- Participated and presented Non-Disaster training statewide through the Community Education and Outreach program.
- Increased efficiency in the workplace and worked directly with my team to develop customer-focused content.

Suzie Sumpter, CFM

Grant Manager



28 Years of Experience

AREAS OF EXPERTISE

FEMA Hazard Mitigation Assistance (HMA) Programs, including Hazard Mitigation Grant Program (HMGP), Federal Mitigation Assistance (FMA), and Building Resilient Infrastructures and Communities (BRIC)

FEMA Public Assistance (PA) Programs

Louisiana Watershed Initiative

HUD Community Development Block Grant–Disaster Recovery (CDBG-DR) Programs

Project Management

National Environmental Policy Act (NEPA) Clearance for Housing and Infrastructure Projects

CERTIFICATIONS

Certified Floodplain Manager (CFM)

HIGHLIGHTS

- ✓ **More than 28 years of management experience**, including nine years in emergency management and disaster recovery.
- ✓ **More than 15 years of high-level experience** with FEMA’s HMA programs, including HMGP, FMA, and BRIC.
- ✓ **Extensive experience writing and administering Section 404 and 406 hazard mitigation grants and federal non-disaster grants**, including technical assistance to subrecipients, project eligibility, cost estimation, damage assessments, project worksheet (PW) formulation, and implementation of federal, state, and local compliance regulations.
- ✓ **Has managed over \$100 million in funding for housing projects** to acquire, elevate, or reconstruct qualified homes, including several historic structures.
- ✓ **Managed 40 various infrastructure projects** with grant funds totaling nearly \$125 million.
- ✓ **Successfully secured funding for and implemented more than 900 elevation, reconstruction, or acquisition projects** and more than 60 infrastructure projects throughout Louisiana.

RELEVANT PROJECT EXPERIENCE

Project Manager, Louisiana Governor’s Office of Emergency Preparedness (GOHSEP), Program Management Assistance for Stafford Act – HMGP for Subrecipients—HGA, Baton Rouge, LA, 2020–present

- Provides grant management for a \$381 million mitigation program funded by FEMA HMGP grants.
- Provides GOHSEP technical assistance to grant subrecipients, helping them to manage their HMGP grants in an efficient and compliant manner.

Project Manager, Southeast Louisiana Flood Protection Authority-East (SELA FPA-E), Hazard Mitigation Assistance Services—HGA, Baton Rouge, LA, October 2020–present

- Led the vetting for project eligibility and supported development of the successful BRIC application.
- Supports all aspects of safe room development.
- Oversees all mitigation activities for compliance.
- Monitors declining balance and project overruns or underruns based on approved line-item budget and funding.
- Audits project invoices and payment tracking to ensure timely payments.

TRAINING

- FEMA BCA Toolkit Version 6.0 Training
- Successfully completed 26 courses through FEMA Emergency Management Institute

PROFESSIONAL AFFILIATIONS

- Association of State Flood Plain Managers (ASFPM)
- Louisiana Floodplain Management Association (LFMA)
- International Emergency Management Group (IEMG)
- Lake Pontchartrain Basin Foundation

EMPLOYMENT HISTORY

- HGA, November 2012–Present
- St. Tammany Parish Government, February 2006–March 2013

Project Manager, Ouachita Parish/City of Monroe and City of West Monroe, FEMA HMA/PA Housing and Infrastructure Program Management—HGA, Baton Rouge, LA, February 2018–present

- Identifies eligible projects and prioritizes them based on availability of funding.
- Works with Parish Engineer to develop a scope of work for large-scale infrastructure and housing applications under FEMA HMA, FEMA PA, and Louisiana Department of Transportation and Development Statewide Flood Control programs.
- Compiles data, composes and submits grant applications, and formulates PWs; Reviews and approves all closing documents.

Project Manager, Tensas Basin Levee District, FEMA HMA/PA Infrastructure Program Management—HGA, Baton Rouge, LA, August 2018–present

- Submits environmental clearance requests, compiles draft Environmental Assessments for FEMA EHP review, and mitigates identified adverse effects.
- Compiles cost/price detail sheets and cost-reasonableness data; audits project invoices and payment tracking.

Project Manager, Tangipahoa Parish, FEMA Hazard Mitigation Infrastructure Program Management—HGA, New Orleans, LA, 2018–present

- Ensures the successful administration of all projects under HMA and CDBG-DR programs.
- Runs and monitors project BCAs for cost-reasonable projects.

Project Manager, Plaquemines Parish Government, FEMA Hazard Mitigation Housing and Infrastructure Program Management—HGA, New Orleans, LA, November 2012–present

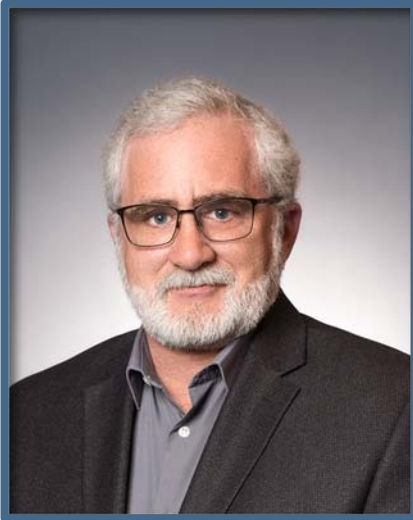
- Develops policies and procedures under the federal guidance to meet the goals and priorities of the local government.
- Compiles data and composes and submits grant applications.
- Works with homeowners, engineers, architects, and contractors to successfully administer large housing projects under HMA and CDBG-DR programs.
- Reviews construction quotes submitted for housing projects.

Project Manager, St. Bernard Parish Government, FEMA Hazard Mitigation Housing and Infrastructure Program Management—HGA, New Orleans, LA, March 2013–present

- Works with homeowners, engineers, architects, contractors, and local, state, and federal staff to ensure successful administration of all housing projects under HMA and CDBG-DR programs.
- Develops policies and procedures for local governments to ensure compliance with all guidance and regulations.

Bill Blankenship, CFM

Grant Manager



20 Years of Experience

AREAS OF EXPERTISE

- Project Management
- HUD Community Development Block Grant–Disaster Recovery (CDBG-DR)
- FEMA Hazard Mitigation Grant Program (HMGP)
- FEMA Public Assistance (PA)
- Low-Income Housing Tax Credit (LIHTC) Program
- Economic Revitalization and Development
- Stormwater Mitigation
- Hydrological & Hydraulic Reporting
- Program/Project Management
- Contract Administration
- Financial Management
- Section 106 Reviews
- State Historic Preservation Office

EDUCATION

- B.A., History, Kennesaw State University, Kennesaw, GA, 2000

HIGHLIGHTS

- ✓ 20 years of professional experience, including **15 years working with HUD- and FEMA-funded projects.**
- ✓ **Expertise in CDBG-DR** requirements and best practices.
- ✓ **Subject Matter Expert (SME)** on resilient infrastructure development and housing.
- ✓ **Currently serves as project manager on multimillion-dollar CDBG-DR/CDBG-MIT program**, responsible for 43-member team providing grant management services for subrecipients impacted by Hurricanes Matthew and Florence.
- ✓ Provided grant management services to five Upstate New York counties affected by Hurricanes Irene and Sandy and Tropical Storm Lee, **developing nearly 90 eligible projects utilizing \$45 million in HUD-funded projects.**
- ✓ Proficient in Davis-Bacon and Related Acts (DBRA) requirements and labor compliance issues.
- ✓ **Developed and constructed projects that significantly increased the rate of economic revitalization**, creating jobs and opportunities in economically depressed areas.
- ✓ **Developed projects that doubled treated water capacity** after storm events, allowing treatment plants to remain online and reducing dependence on outside sources.
- ✓ **Certified Public Historian, skilled in Section 106 Reviews.**

RELEVANT PROJECT EXPERIENCE

Project Manager / Subject Matter Expert, North Carolina Office of Recovery and Resiliency (NCORR), Cary, NC, April 2020 – present

- Supervises a team of 43 Case Managers, Grant Managers and Subject Matter Experts responsible for single and multi-family housing, small rental, QA/QC, M/WBE, Section 3, and infrastructure for three disaster recovery programs.
- Serves as a Subject Matter Expert on resilient infrastructure.
- Provides expertise to NCORR Policy Team related to CDBG-DR requirements and best-practices processes.
- Coordinates with housing development authorities and private developers to provide housing for low-to-moderate-income (LMI) populations.
- Completes funding applications, helped procure architectural/engineering services, monitored subsequent design stages, and kept project budgets within the funding allocation.

CERTIFICATIONS

- Certified Floodplain Management, FEMA, 2011
- Public Historian, Economic Development, University of Georgia, 2001
- Public Historian, Public Administration, University of Georgia, 2001

TRAINING

- Floodplain Management, Continuing, 2011–present

RELEVANT EMPLOYMENT HISTORY

- HGA, 2008–present
- WABI America, 2006–2008
- Fort Mountain Preservation Services, 2001–2008

Senior Grant Manager, New York Governor’s Office of Storm Recovery (GOSR), New York Rising Community Reconstruction Program—HGA, Kingston, NY, July 2014–April 2020

- Provided grant management services to 16 Catskills Mountains and two Mohawk Valley communities affected by Hurricanes Irene and Sandy and Tropical Storm Lee.
- Developed nearly 90 eligible projects in five upstate NY counties, covering \$45 million in HUD funds.
- Coordinated with housing development authorities and private developers to provide housing for (LMI) populations.
- Performed initial assessment of community needs and capacity to carry out program goals.
- Completed funding applications, helped procure design staff, and kept project budgets within the funding allocation.

Grant Manager, Louisiana Office of Community Development (OCD), Hurricane Katrina/Rita Recovery Program—HGA, Ruston and Baton Rouge, LA, January 2009–July 2014

- Provided grant management services for parishes affected by Hurricanes Katrina and Rita.
- Developed environmental reviews in compliance with requirements of the National Environmental Protection Act.
- Managed statewide Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP) and local government emergency infrastructure projects.
- Developed 19 projects from pre-development to closeout.
- Assisted communities with bidding for construction of designed projects, monitored construction progress, and conducted successful closeout of projects.

Grant Manager, Louisiana OCD, Hurricane Gustav/Ike Parish-Implemented Recovery Program—HGA, Baton Rouge, LA, August 2010–July 2014

- Provided grant management services to HUD-funded Hurricane Gustav/Ike disaster recovery programs for four Louisiana parishes.
- Developed 30 total planning, infrastructure, and economic development projects through pre-development and closeout.
- Developed environmental reviews in compliance with requirements of the National Environmental Protection Act.

Grant Manager, Louisiana OCD, Housing Tax Credit Piggyback Program—HGA, Ruston and Baton Rouge, LA, April 2008–July 2014

- Helped to develop and implement the LIHTC Davis-Bacon and Related Acts (DBRA) Certified Payroll Review Team.
- Reviewed certified payrolls, prepared monthly reporting, assessed wage restitution and liquidated damages, conducted labor compliance interviews, and assisted Department of Labor personnel with investigation of labor compliance claims in statewide projects.

Valesquez “Quez” Jones

Grant Manager



19 Years of Experience

AREAS OF EXPERTISE

- Disaster Response & Recovery
- FEMA Public Assistance (PA) Program
- FEMA Public Assistance Alternative Procedures (PAAP)
- Project Management
- Project Worksheet (PW) Formulation
- Project & Grant Closeout
- Grant Management
- Quality Assurance/Quality Control (QA/QC) and Compliance
- Debris Management

EDUCATION

- B.S., Business, Virginia State University, Ettrick, VA, 1997

CERTIFICATIONS

- Licensed Realtor, State of Louisiana

HIGHLIGHTS

- ✓ **19 years of Public Assistance experience**, with extensive knowledge and experience writing PWs, conducting site visits of affected areas, and reviewing PWs for grant reimbursement and final closeout reconciliation.
- ✓ **Four years of experience with the Closeout Group** of the Louisiana Governor’s Office of Homeland Security and Emergency Preparedness.
- ✓ **Prepared and submitted official letter** requesting approval for FEMA PAAP projects.
- ✓ **Has helped formulate appropriate appeals requests** for reconsideration of decisions regarding eligibility and assisted qualified subgrantees with proper submissions for any Community Disaster Loans, in accordance with state and federal guidelines.
- ✓ **Directs and oversees architectural and engineering (A/E) firms in developing scopes of work** for restoration. Prepares and submits resource request forms (RRFs) for reimbursement.
- ✓ **Served on several disasters as Senior Debris Field Coordinator** and Debris Recovery Project Manager throughout the states of Louisiana, Florida, North Carolina, South Carolina, Virginia, Georgia, Alabama, and Texas.
- ✓ **Awarded the City Park Improvement Association’s President’s Award** for efforts to support the recovery from Hurricane Katrina.

RELEVANT PROJECT EXPERIENCE

PA Specialist, Cameron Parish, LA, FEMA PA Program Management Services—HGA, Lake Charles, LA, September 2020–present

- Prioritizes damages according to categories of work for FEMA submission.
- Supports preliminary damage assessments (PDAs) to document damages from Hurricane Laura, including through use of high-resolution aerial imagery.
- Assists with reconciling insurance documentation and assists with identifying donated resources to help offset cost share.

Public Assistance Consultant, University of North Carolina Schools System, COVID-19 Response—IAF Consulting, Chapel Hill, NC, 2020–present

- Currently assists the UNC university system as needed with COVID-19 response and recovery for CARES Act and FEMA funding.

TRAINING

- FEMA Grants Portal—EMMIE-NEMIS, FEMA on-the-job training
- National Incident Management System (NIMS) 100, 200, 300, 400, 700, 800, FEMA Emergency Management Institute (EMI)
- Coronavirus Aid, Relief, and Economic Security (CARES) Act Training
- EMGRANTS PRO-Louisiana PA-MB3
- NC Real Estate Appraisal Course
- NC Home Inspector Course
- OPS 1 Project Officer Training
- Personnel Management Course
- Debris Operations I
- Time Management Training
- Hurricane Shelter Assessments & Evaluations

EMPLOYMENT HISTORY

- HGA, 2020–present
- IAF Consulting, 2017–2020
- Florida Disaster Consultants, 2017–2018
- Plexos Group, 2016–2017
- GCR, Inc., 2013–2016
- Witt Associates, October 2006–2013
- PBS&J (Atkins), March 2003–September 2006

Closeout Lead/Program Manager, Housing Authority of New Orleans (HANO), Disaster Recovery Support—IAF Consulting, New Orleans, LA, 2017–2020

- Assisted with efforts to close out PWs for all past disasters, including Hurricanes Katrina, Rita, Gustav, and Isaac.
- Prepared and submitted reimbursement requests, as needed, and requested for additional scope or cost alignment.

Public Assistance Consultant, University of North Carolina, Hurricane Florence Recovery—IAF Consulting, Wilmington, NC, 2018–2019

- Assisted with implementation of all aspects of the FEMA PA program in support of the University’s Hurricane Florence recovery efforts.

Compliance Manager, City of Columbia, SC, Disaster Recovery Support—Landmark/Plexos Group, Columbia, SC, 2017–2018

- Reviewed all FEMA PWs and RRFs for accuracy and eligibility requirements.
- Ensured that project management and direct administrative cost (DAC) expenses were charged properly.

Closeout Specialist, Louisiana Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP) Strike Team—Florida Disaster Consultants, Baton Rouge, LA, 2017–2018

- Implemented the closeout procedures for Hurricane Katrina/Rita projects identified by GOHSEP.
- Worked directly with Louisiana Department of Transportation to prepare PWs for closeout.

Compliance Manager, East Baton Rouge Parish—Plexos Group, Baton Rouge, LA, 2016–2017

- Performed QA/QC reviews on all FEMA PWs and RRFs for accuracy and eligibility requirements; also ensured that project management and DAC expenses were charged properly.

Closeout Specialist Supervisor/Program Manager, GOHSEP, Disaster Recovery Closeout—GCR Inc., Baton Rouge, LA, 2013–2016

- Worked with GOHSEP’s Closeout Section, managing and directing more than 80 PA and HMGP Closeout Specialists in closing four major declared disasters.

Closeout Specialist Supervisor, GOHSEP Closeout Section—GCR, Inc., Baton Rouge, LA, 2013–2016

- Managed a team of Closeout Specialists in administering GOHSEP’s closeout policy and procedures and assisted with development of GOHSEP policy and procedures for closeout.

GOHSEP Closeout Specialist, Witt Associates, Baton Rouge, LA, 2012–2013

- Served all Louisiana applicants that were ready for project or disaster closeout.
- Conducted final reviews of all invoices, contracts, procurement, and other supporting documentation relating to FEMA PWs.

Beckie Northrop

Grant Manager



30 Years of Experience

AREAS OF EXPERTISE

- HUD Community Development Block Grant–Disaster Recovery (CDBG-DR)
- Housing Choice Voucher (HCV) and Project-Based Voucher (PBV) Programs
- Section 811 Project Rental Assistance (S811 PRA) Demonstration
- Rental Assistance Demonstration (RAD)
- Strategic Planning
- Urban Planning and Community Development
- Program Development and Evaluation

EDUCATION

- M.B.A., Organizational Development/Human Systems, George Washington University, Washington, DC, 1981
- B.A., International Affairs, George Washington University, Washington, DC, 1979

HIGHLIGHTS

- ✓ **More than 30 years of professional experience** in the field of community development and HUD-assisted housing.
- ✓ **Acted as start-up Program Director for the development and implementation of the Disaster Recovery Project-Based Voucher (PBV) Program** for disabled, at-risk homeless families in the Gulf region of Louisiana affected by Hurricane Katrina; this program was able to begin housing clients within 60 days.
- ✓ **Provided Public Housing Manager and RAD training** to the Guam Housing and Urban Renewal Authority, and RAD training to the Atlanta and Hagerstown Housing Authorities; trainees achieved a 98% pass rate.
- ✓ **Developed and implemented North Carolina’s CDBG-DR-funded Strategic Buyout Program** for those impacted by Hurricanes Matthew and Florence.
- ✓ **Developed Procedure Manual and Quality Assurance Plan** for the NY Rising Acquisition and Buyout Program administered by the NY Governor’s Office of Storm Recovery (GOSR).

RELEVANT PROJECT EXPERIENCE

Buyout Specialist, North Carolina Office of Recovery and Resiliency (NCORR), ReBuild NC Program—HGA, Raleigh, NC, June 2019–present, IEM, December 2018–March 2019

- Began development and implementation of the North Carolina CDBG-DR–funded Strategic Buyout Program for those impacted by Hurricanes Matthew and Florence.
- Worked with NCORR staff to develop and document the policies for the Buyout Program. Developed a strategy paper and tracker outlining policy issues requiring resolution
- Currently assisting with program implementation by researching regulatory requirements, assisting with multiple storm strategies, reviewing Standard Operating Procedures documents, etc.

HUD Training Provider, RP Northrop Associates, Guam and Atlanta, GA, 2015–2018

- Provided Public Housing Manager and RAD training to the Guam Housing and Urban Renewal Authority, and RAD training to the Atlanta and Hagerstown Housing Authorities.

Team Lead, HUD Technical Assistance—RP Northrop Associates, Charleston County, NC, 2015–2018

- Served as Team Lead for a HUD-sponsored effort to increase the organizational sustainability of the financially troubled Charleston County Housing and Redevelopment Authority.

EMPLOYMENT HISTORY

- HGA, March 2019–present
- IEM, December 2018–March 2019
- RP Northrop Associates Management Consulting, 1994–November 2018
- City of Philadelphia Office of Housing and Community Development, November 1985–June 1994
- Philadelphia Housing Authority, November 1984–November 1985

Technical Assistance, NC Managed Care Organization (MCO) Alliance Health, NC Transition to Community Living Voucher Program (TCLV)—RP Northrop Associates, North Carolina, 2017

- Helped NC Managed Care Organization (MCO) Alliance Behavioral Healthcare to implement a state-funded housing voucher program for persons with disabilities in response to an Olmstead-related lawsuit.

Technical Assistance, HUD, S811 PRA Program Evaluation—RP Northrop Associates, 2015–2016

- Helped to complete a 6-state Case Study Report as part of the evaluation of the new S811 Project Rental Assistance Program for persons with disabilities eligible for “The Money Follows the Person” or other Medicaid assistance.

Technical Assistance, HUD, Strong Cities, Strong Communities (SC2) Program, Assessment of Demolition System—RP Northrop Associates, Youngtown, OH, 2012–2013

- Developed improved business systems for demolition under the Strong Cities, Strong Communities (SC2) program. Demolition was funded by NSP, CDBG, city funds, and state funds.

Technical Assistance Provider, HUD, HOPE VI Projects—RP Northrop Associates, 1995–2013

- Provided urban planning, expediter, project management, and alternate administrator services to more than 20 HOPE VI projects nationwide.

Compliance Officer, NY GOSR, NY Rising Buyout Program—RP Northrop Associates, Albany, NY, 2009–2010

- Developed a Procedure Manual and Quality Assurance Plan for the NY Rising Acquisition and Buyout Program.
- Helped to perform file reviews to prepare for HUD audit. No findings resulted from the HUD audit.

Program Director, State of Louisiana, Project-Based Voucher Program (PBV) for Persons with Disabilities—RP Northrop Associates, Baton Rouge, LA, 2009–2010

- Acted as start-up Program Director for the development and implementation of the Disaster Recovery PBV Program for disabled, at-risk homeless families affected by Hurricane Katrina across the Gulf region of Louisiana.

Deputy Director, Policy and Planning, Office of Housing and Community Development, Philadelphia, PA, 1985–1994

- Responsible for developing the \$120 million annual CDBG budget and plan and for reviewing all developer requests for CDBG-LIHTC-funded project financing.

Catherine Sumpter

Grant Writer



11 Years of Experience

AREAS OF EXPERTISE

- FEMA Hazard Mitigation Assistance (HMA) Program Disaster and Non-Disaster Grants, including Hazard Mitigation Grant Program (HMGP)
- FEMA Public Assistance (PA) Program Grants
- HUD Community Development Block Grant–Disaster Recovery (CDBG-DR) Program
- CDBG Entitlement Programs
- Compliance Monitoring

EDUCATION

- B.A., History, Minor in Philosophy and Professional Writing, Spring Hill College, Mobile, AL, 2009

HIGHLIGHTS

- ✓ **More than 11 years of grant management experience**, specializing in HMA grant programs.
- ✓ **Extensive experience supporting all stages of HMGP grant administration**, including subapplicant review.
- ✓ **Currently administering approximately \$52 million in federal funds for housing projects** in multiple communities for the elevation, reconstruction, or acquisition of homes affected by natural disasters.
- ✓ **Successfully revamped the Lafayette Consolidated Government Elevation/Acquisition Project.** Project was previously stagnant; helped to get projects moving and to rebuild confidence with our client. The turnaround led to two new opportunities, one for a reallocation of HMGP funds and one for non-disaster funds.
- ✓ **Contributed to the successful application amendment for 30 additional properties in Plaquemines Parish** and the successful amendment for six additional properties in St. Bernard Parish.

RELEVANT PROJECT EXPERIENCE

Grant Manager, Louisiana Governor’s Office of Emergency Preparedness (GOHSEP), Program Management Assistance for Stafford Act – HMGP for Subrecipients—HGA, Baton Rouge, LA, 2020–present

- Provides grant management for a \$381 million mitigation program funded by FEMA HMGP grants.
- Performs outreach and application development: reaching out to the parishes to inform them of the availability of services under our contract with GOSHEP; participating in meetings and/or calls to discuss funding and potential projects.
- Keeps track of the status of the development, working on data collection; also created several tools being used for data collection with the parishes and developed a paper template of the digital application for input of data as it becomes available.
- Develops scopes of work and coordinates the signing of all required forms and documents.
- After data is gathered, inputs application narrative and attachments into the State’s LAHM system for submission.

TRAINING

- FEMA BCA Toolkit Version 6.0 Training
- FEMA Mitigation Courses (IS212.b, 276, 321, 393.b)
- FEMA E212: Developing Quality Application Elements
- FEMA IS-30.a: Mitigation eGrants for Subgrant Applicants
- Integrated Disbursement & Information Systems Training for CDBG Grantees, HUD
- Federal Labor Compliance Standard Course
- Environmental Review Course, HUD
- CDBG Basics; Training for Practitioners, HUD

EMPLOYMENT HISTORY

- HGA, November 2014–present
- St. Tammany Parish Government Department of Health & Human Services, 2009–2014
- Grant Writer and Research Assistant, Spring Hill College, Mobile, AL, 2007–2009

Grant Manager, Cameron Parish, FEMA PA Hazard Mitigation for Hurricane Laura—HGA, Baton Rouge, LA, 2020–present

- Supported development of the PA grant application for a \$50 million infrastructure mitigation program.
- Able to support program implementation upon FEMA approval of the application.

Grant Manager, Lafayette Consolidated Government, HMA Residential Housing Acquisition, and Elevation Projects—HGA, New Orleans, LA, 2018–present

- Revitalized stagnant project, reinstating workflows and ending work backlog.
- Built trust with client due to increased work efficiency.
- Shepherded two new opportunities for HMGP fund reallocation and non-disaster fund allocation.
- Monitors all aspects of hazard mitigation assistance for \$12.8 million HMA-funded housing program.
- Supporting 35 home acquisitions and 27 home elevations to date by coordinating with homeowners, contractors, engineers, architects, and local, state, and federal staff to carry out individual acquisition and elevation projects from inception to closeout.

Grant Manager, Plaquemines Parish, HMA Elevation and Reconstruction Projects and Infrastructure—HGA, Plaquemines Parish, LA, 2014–present

- Supporting 211 home elevation projects and 12 home reconstruction projects to date, from inception to closeout, and six infrastructure projects from application development through closeout.
- Conducted reviews of historic buildings and sites, requiring significant additional review and compliance according to Section 106 of the National Historic Preservation Act of 1966.
- Monitors all aspects of hazard mitigation assistance for a \$64.9 million housing mitigation program funded by HMA grants. Maintains budgets, reviews documents, conducts inspections, and processes and tracks invoices.
- Monitors all aspects of hazard mitigation assistance for a \$22.8 million infrastructure mitigation program funded by HMA grants. Monitors project compliance, develops applications, ensures contract procurement and execution, reviews invoices and reimbursement requests.
- Prepares and submits quarterly reports to the State agency, and to client as needed.

- Attends meetings as necessary to provide project updates and resolve issues.

Grant Manager, St. Bernard Parish, HMA Acquisition and Elevation Projects and Infrastructure—HGA, St. Bernard Parish, LA, 2014–present

- Monitors all aspects of hazard mitigation assistance for a \$31.6 million housing mitigation program and for a \$61.7 million infrastructure mitigation program, both funded by HMA grants.
- Supporting 46 home elevation projects and 186 home acquisitions projects to date, from inception to closeout, and supports 11 infrastructure projects from application development through closeout

Grant Manager, Ouachita Parish/City of West Monroe, HMA and PA Housing Acquisitions and Infrastructure—HGA, West Monroe, LA, 2019–present

- Monitors all aspects of hazard mitigation assistance for a \$4.7 million housing mitigation program funded by HMA grants and for a \$32 million infrastructure mitigation program funded by a combination of HMA and PA grants.
- Supporting 29 home acquisitions projects to date, from inception to closeout, and supporting closeout for 14 infrastructure projects.

CDBG Coordinator, St. Tammany Parish Government Department of Health & Human Services, Covington, LA, 2010–2014

- Monitored all aspects of CDBG projects.
- Drafted agreements, annual plans, and amendments for CDBG programs and projects.
- Drafted the Davis-Bacon Handbook for Parish use.
- Completed Integrated Disbursement and Information System (IDIS) training.
- Researched, drafted, and implemented new program policies to ensure federal compliance.
- Obtained and reviewed monthly status reports from grant subrecipients.
- Conducted monitoring visits at project sites for program management and compliance.
- Tracked program data for federal reporting. Prepared and submitted reports to federal government as required.
- Worked closely with community leaders and served as department liaison.
- Coordinated community service information in an effort to keep public informed. Worked with Community Development Specialist on public outreach efforts. Updated community resources lists, databases, and website for public information. Published monthly newsletter and brochures featuring community events and services.
- Collaborated on the creation and annual updating of the Department's Emergency Management and Special Needs Shelter Plans.
- Coordinated and carried out all logistics of the Department's Emergency and Special Needs Shelter Plans during activation for Hurricane Isaac.
- Served as essential personnel and manager at special needs shelter during activation. Oversaw all shelter activity during shift to ensure the safety and well-being of essential personal and patients sheltered at the facility.
- Coordinated post-disaster clean-up, breakdown, and reporting to Parish government and FEMA.
- Assisted Community Development Specialist with CDBG monitoring and reporting.

Community Action Outreach Worker, St. Tammany Parish Government, Department of Health & Human Services, Covington, LA, 2009–2010

- Received applicants, performed intake, and processed grant applications on all available programs.
- Maintained all grant documents. Prepared and filed Community Service Block Grant quarterly report.



11 Years of Experience

AREAS OF EXPERTISE

- Disaster Recovery
- FEMA Hazard Mitigation Assistance (HMA) Disaster & Non-Disaster Grants
- FEMA Public Assistance (PA) Program Grants
- HUD Community Development Block Grant–Disaster Recovery (CDBG-DR) Grant Administration
- Property Inspections
- Project Closeout

EDUCATION

- Coursework, Tulane University, New Orleans, LA, 2003–2005

HIGHLIGHTS

- ✓ **More than 11 years of experience administering grant projects** under various funding sources such as PA, HMA, CDBG, HPG, and SNAP.
- ✓ **Possesses expertise in all stages of hazard mitigation grant process.**
- ✓ **Provides technical assistance to grant subapplicants and subrecipients**, ensuring compliance with all program regulations.
- ✓ **Has provided comprehensive grant management services for eight government agency clients** covering seven disaster declarations.
- ✓ **Interfaces with clients and stakeholders** at all levels of the public and private sectors.

RELEVANT PROJECT EXPERIENCE

Grant Manager, Cameron Parish, FEMA PA Hazard Mitigation for Hurricane Laura—HGA, Baton Rouge, LA, 2020–present

- Monitors all aspects of hazard mitigation assistance for a \$50 million infrastructure mitigation program funded by PA grants.
- Supports preliminary damage assessments (PDAs) to document damage from Hurricane Laura, including high-resolution aerial imagery.
- Collects force account labor and documents the equipment used for emergency protective measures.
- Works with insurance companies and assists with scopes of repair for all damages.
- Provides technical assistance for procurement of contractors for permanent repairs.
- Supports development of project worksheets (PWs).

Grant Manager, East Baton Rouge Parish, HMA Elevation Program – Disaster & Non-Disaster – HGA, Baton Rouge, LA, 2021–present

- Monitors all aspects of hazard mitigation assistance and provides Technical Assistance for an \$8.7 million housing mitigation program funded by HMA grants.
- Supports 47 home elevation projects from inception to closeout.

TRAINING

- FEMA BCA Toolkit Version 6.0 Training, 2020
- FEMA IS-00393.b, Intro to Hazard Mitigation, 2018
- FEMA HMA Developing Quality Application Elements, 2018
- FEMA-IS-00321, Hurricane Mitigation Basics for Mitigation Staff, 2018
- FEMA Flood Insurance Rate Map, 2016
- FEMA IS-00212.a, Intro to Unified Hazard Mitigation Assistance, 2015
- FEMA IS-00212.b, Intro to Unified Hazard Mitigation Assistance (HMA), 2015
- FEMA-00276, Benefit-Cost Analysis (BCA) Fundamentals, 2015
- FEMA IS-0322, Flood Mitigation Basics for Mitigation Staff, 2015

PROFESSIONAL AFFILIATIONS

- Association of State Floodplain Managers
- Louisiana Floodplain Managers Association

EMPLOYMENT HISTORY

- HGA, November 2012–Present
- Volunteers of America Repairs on Wheels Program, 2010–2014
- Fairway Medical Surgical Hospital, 2000–2006

- Maintains detailed and accurate budgets for individual projects and overall grant funds.
- Conducts milestone inspections on site to guarantee grant compliance, processes invoice paperwork, and uploads documentation to web-based portals as required.
- Reviews project bid documents to ensure cost reasonableness, coordinates revisions to project scope, reviews contract documents, and facilitates the signing of all necessary paperwork.

Grant Manager, Louisiana Governor’s Office of Emergency Preparedness (GOHSEP), Program Management Assistance for Stafford Act – HMGP for Subrecipients—HGA, Baton Rouge, LA, 2020–present

- Provides technical assistance and grant management services for a \$381 million mitigation program funded by FEMA HMGP grants statewide.
- Manages all aspects of the housing projects, both elevation and acquisitions, from project award to closeout.
- Assists in developing project applications for multiple jurisdictions.
- Manages accurate budgets for individual projects and overall grant funds to ensure timely and accurate expenditure of grant funding. Oversees the construction of elevation projects and acquisitions and closings for grant compliance

Grant Manager, Ouachita Parish/City of West Monroe, HMA and PA Housing Acquisitions and Infrastructure—HGA, West Monroe, LA, 2019–present

- Monitors all aspects of hazard mitigation assistance for a \$4.7 million housing mitigation program funded by HMA grants and for a \$32 million infrastructure mitigation program funded by a combination of HMA and PA grants.
- Supporting 29 home acquisitions projects to date, from inception to closeout, and supports closeout for 14 infrastructure projects.
- Maintains detailed and accurate budgets for individual projects and overall grant funds to ensure the timely and accurate expenditure of grant funding.
- Reviews project bid documents to ensure cost reasonableness, coordinates revisions to project scope, reviews contract documents, and facilitates the signing of all necessary paperwork.

Grant Manager, City of Lafayette Consolidated Government, HMA Acquisition and Elevation Projects—HGA, Lafayette, LA, 2018–present

- Monitors all aspects of hazard mitigation assistance for \$12.8 million housing program funded by HMA grants.
- Supported 35 home acquisitions and 27 home elevations to date by coordinating with homeowners, contractors, engineers, architects, and local, state, and federal staff to carry out individual acquisition and elevation projects from inception to closeout.
- Successfully revamped the project, which was previously stagnant. Helped to get projects moving and to rebuild confidence with our client. The turnaround led to two new opportunities, one for a reallocation of HMGP funds and one for non-disaster funds.

Grant Manager, Plaquemines Parish, HMA Elevation and Reconstruction Projects and Infrastructure—HGA, Plaquemines Parish, LA, 2014–2021

- Monitored all aspects of hazard mitigation assistance for a \$64.9 million housing mitigation program and for a \$22.8 million infrastructure mitigation program, both funded by HMA grants.
- Supported 211 home elevation projects and 12 home reconstruction projects from inception to closeout, and supported closeout for 6 infrastructure projects.
- Two of the home elevations involved historic buildings or sites, requiring significant additional review.
- Maintained detailed and accurate budgets for individual projects and overall grant funds.
- Reviewed project bid documents to ensure cost reasonableness and made necessary revisions.
- Conducted milestone inspections on site to guarantee grant compliance, processed invoice paperwork, and uploaded documentation to web-based portals as required.

Grant Manager, St. Bernard Parish, HMA Acquisition and Elevation Housing Projects and Infrastructure—HGA, St. Bernard Parish, LA, 2014–2021

- Monitored all aspects of hazard mitigation assistance for a \$31.6 million housing mitigation program and for a \$61.7 million infrastructure mitigation program, both funded by HMA grants.
- Supported 46 home elevation projects and 186 home acquisitions projects from inception to closeout, and supported closeout for 11 infrastructure projects.
- Maintained detailed and accurate budgets for individual projects and overall grant funds to ensure the timely and accurate expenditure of grant funding.
- Reviewed project bid documents to ensure cost reasonableness, coordinated revisions to project scope, reviewed contract documents, and facilitated the signing of all necessary paperwork.
- Conducted milestone inspections on site to guarantee grant compliance, processed invoice paperwork, and uploaded documentation to web-based portals as required.

Specialist, City of Ruston, PA Disaster Advisory Services—HGA, Ruston, LA, April–June 2019

- Provided technical assistance to the City of Ruston to ensure that information describing work and its associated costs was captured and listed in the proper FEMA PA Category (A through G).
- Supported the City of Ruston by ensuring that all damages were documented and that accurate estimates to repair or replace damaged items were developed correctly.

- Provided guidance to ensure that the procurement process met local, state, and federal requirements.

Grant Manager, St. Tammany Parish, Residential Housing Elevation Projects—HGA, St. Tammany Parish, LA, January 2017–August 2017

- Monitored all aspects of hazard mitigation assistance, to include disaster and non-disaster funding for elevation projects.
- Coordinated with homeowners, contractors, engineers, architects, and local, state, and federal staff to secure and carry out individual elevation projects from inception to closeout.
- Reviewed project documents and made revisions as needed.
- Conducted milestone inspections on site to guarantee grant compliance, processed invoice paperwork, and uploaded documentation to web-based portals as required.

Project Coordinator, Repairs on Wheels, Volunteers of America—Greater New Orleans, St. Tammany Parish and Jefferson Parish, LA, 2010–2014

- Qualified the grant applicants and completed environmental assessments.
- Coordinated with homeowners, contractors, and local staff to secure and carry out individual minor rehabilitation projects from inception to closeout.
- Maintained detailed and accurate budgets for individual projects and overall grant funds to ensure the timely and accurate expenditure of grant funding.
- Prepared monthly billing and reports for funders and internal management.
- Reviewed files for grant compliance.
- Reviewed project documents for accuracy.
- Assisted the Program Manager with any other CDBG grant work as necessary.



26 Years of Experience

AREAS OF EXPERTISE

- Disaster Recovery
- Program Management
- Policy Compliance
- Funding Maximization
- Housing Programs
- Training
- Community Engagement
- FEMA, HUD, EPA, and Treasury Recovery Programs

EDUCATION

- Senior Executives in State & Local Government, Kennedy School of Government, Harvard University, 2008
- Graduate Coursework in Natural Resource Economics & Policy, University of Maine, Orono, ME, 1994
- B.A., Government and International Relations, University of South Carolina, Columbia, SC, 1990

HIGHLIGHTS

- ✓ **Created and ran the largest non-federal share local match program in the history of the CDBG-DR programs** by using HUD funds to match FEMA PA and HMGP and EPA storm mitigation loan projects.
- ✓ **Created housing programs and built recovery programs** for school systems, public housing authorities, utility providers, the small business community, the agricultural sector, and the fishing industry.
- ✓ **Experience creating and managing high-profile public programs and leading major disaster recovery efforts**, to include those for Hurricanes Katrina, Rita, Gustav, Ike, Sandy, Matthew, Irma, and Maria and the Deepwater Horizon BP Oil Spill.
- ✓ **Secured billions of dollars for recovery** through the Federal Emergency Management Agency (FEMA) and U.S. Department of Housing and Urban Development (HUD).
- ✓ **Invited to give presentations and trainings** by FEMA, HUD, multi-agency federal task forces, non-profit organizations, and universities. Topics focused on innovative ways to maximize funding streams through the creation of match programs while developing programs that make communities more resilient through strong community engagement and inclusion.

RELEVANT PROJECT EXPERIENCE

Subject Matter Expert, North Carolina Office of Recovery and Resiliency (NCORR), HOPE Program Support—HGA, Baton Rouge, LA, November 2020–present

- Providing technical assistance support to the North Carolina Housing Opportunities and Prevention of Evictions (HOPE) Program, which provides critical funding to low-to-moderate-income households in the forms of emergency rental and utility assistance to prevent homelessness and improve housing stability during the COVID-19 pandemic.
- Provided subject matter expertise to help NCORR to determine awards.
- Led development of process for distributing funds to applicants, landlords, and participating utility providers. Working to help HGA reach its goal of ensuring that payments reach applicants within seven to ten days of eligibility determination.

EMPLOYMENT HISTORY

- HGA, December 2018–present
- Hagerty Consulting, September 2017–December 2018
- New York Governor’s Office of Storm Recovery (GOSR), October 2013–September 2017
- New Jersey Department of Community Affairs, July 2013–October 2013
- Ocean Conservancy, January 2011–December 2012
- Louisiana Recovery Authority (LRA), Office of Community Development Disaster Recovery Unit (OCD-DRU), 2006–January 2011
- South Carolina Department of Health and Human Services, 2003–2006
- Medical University of South Carolina, 2002–2003
- North Carolina Department of Revenue, 1998–2001
- Louisiana Department of Health and Hospitals, 1996–1997
- Louisiana Cooperative Extension Service, 1994–1996

- Provided expert guidance for expansion of HGA staff roles to replace community partners previously providing support for the program.

CDBG-DR Subject Matter Expert, Puerto Rico Department of Housing (PRDOH), Hurricanes Irma and Maria Recovery Programs—HGA, San Juan, PR, April–December 2019

- Provided strategic guidance to the executive staff of PRDOH and the Central Office for Recovery, Reconstruction, and Resiliency (COR3) on ways to maximize CDBG-DR and FEMA funds and meet the Commonwealth’s recovery objectives.
- Drafted and developed the policy and procedure manuals for five CDBG-DR infrastructure programs.
- Oversaw a team that created a document library with more than 100 distinct HUD-compliant, 2 CFR 200-compliant forms, checklists, and documents for recovery programs to use.
- Drafted language for the Substantial Action Plan Amendment to ensure that program implementation would be HUD-compliant. Also provided draft language for legal documents needed by local governments and Commonwealth agencies so that subrecipient agreements and memoranda of understanding would provide flexibility while complying with 2 CFR 200.

CDBG-DR Practice Lead, State of North Carolina, Hurricane Matthew Recovery Programs—Hagerty Consulting, Raleigh, NC, 2017–2018

- Provided subject matter expertise to help the State of North Carolina implement a \$236 million disaster recovery program using HUD CDBG-DR funds, focused on restoration and repair of public and private housing impacted by Hurricane Matthew.
- Provided strategic guidance to the State on how to design and implement its suite of housing and infrastructure programs to remain CDBG-DR-compliant.
- Provided technical assistance to State and county staff and contractors on how to implement housing and infrastructure programs. Trained call center staff to help homeowners apply for housing programs.
- Provided strategies to the State on how to maximize funds to implement a FEMA 428 program for severely impacted Public Housing Authorities and on how to use CDBG-DR home buyouts as match for FEMA’s HMGP.

Managing Director, Infrastructure and Local Government Programs, New York Governor's Office of Storm Recovery (NY GOSR), Albany, NY, 2013–2017

- Created, developed, and managed recovery programs using \$1.3 billion of HUD CDBG-DR funds provided to the state to address recovery needs from five disasters: Hurricane Sandy, Hurricane Irene, Tropical Storm Lee, the 2013 Floods, and Winter Storm Nemo.
- Created, developed, and directed a team that ran the largest non-federal share “local match” program in CDBG-DR history, coordinating the use of HUD CDBG-DR funds as match for projects in FEMA’s PA, HMGP, and IA programs and the EPA’s Storm Mitigation Loan Program (SMLP). This funding aided more than 1,500 units of government, schools, public utilities, energy providers, roads, housing authorities, and first responder facilities.
- Worked with multiple stakeholders to use CDBG-DR and other federal funds to help the recovery process, including the \$830 million repair of Bay Park Sewage Treatment Plant using FEMA 428 Public Assistance Alternative Procedures (PAAP) funds.
- Engaged with HUD’s Office of Community Planning and Development (CPD) staff on program design, policy, and HUD compliance issues for infrastructure and local government programs.
- Managed and directed a team that used NOAA disaster recovery funds to assist the recreational and commercial fishing sectors impacted by Hurricane Sandy. Ensured that the program did not result in a duplication of benefit with other NOAA, HUD CDBG-DR, or Small Business Administration (SBA) program funds.
- Drafted and helped to develop HUD action plans and quarterly progress reports (QPRs) and set up activities in HUD’s DRGR system.
- Invited by HUD to provide training to other CDBG-DR grantees in New Orleans and Chicago on how to coordinate HUD and FEMA funding to address recovery needs.

Assistant Director for Recovery Programs, Sandy Recovery, New Jersey Department of Community Affairs, Trenton, NJ, 2013

- Established programs so that New Jersey could access HUD CDBG-DR funds to address infrastructure, local government, and small business recovery needs following Hurricane Sandy using roughly \$600 million of CDBG-DR allocation.
- Conducted site visits of disaster housing program intake centers to assess, streamline, and improve customer service.
- At the direction of the Secretary, led the effort to relocate the CDBG-DR housing program call center from Florida to New Jersey to improve customer service experience for impacted homeowners, identifying and using a veteran-owned business.
- Helped to draft HUD action plans and QPRs and set up DRGR system activities.
- Communicated and engaged frequently with HUD CPD staff and NJ Governor’s Office of Recovery and Rebuilding (GORR) on program design, policy, and HUD compliance issues for newly created disaster recovery programs.
- Developed policy and procedures and operating manuals necessary for recovery programs to become operational.
- Directed teams of consultants and state staff working on long-term planning needs and focused on economic and community development, transportation-based microgrids, county and local government initiatives, and non-federal share programs.

- Assisted finance team with review of housing program vouchers to speed payments to impacted homeowners.

Senior Policy Analyst & Government Affairs Manager, Ocean Conservancy, Deepwater Horizon Gulf Restoration Program, 2011–2012

- As a result of the 2010 Deepwater Horizon/BP oil spill, served as lead regional government affairs manager for five Gulf coast states. Developed strategies to provide support necessary for Congress to secure passage of the RESTORE Act, which ensured that over \$20 billion in fines and 80% of Clean Water Act penalties generated from the BP oil spill, were returned to the Gulf coast states for projects to address environmental restoration and economic recovery.
- Invited by President Obama's appointed Federal Task Force to represent all gulf coast NGOs when the Gulf Coast Ecosystem Restoration Task Force released its final strategy document for the region.
- Secured partnerships across the Gulf of Mexico with non-traditional environmental allies, including local and municipal governments, chambers of commerce, economic development agencies, fishing, tourism, and business.
- As the senior policy analyst, helped to put Citizen Advisory Committees in place at the state and federal levels. Conducted considerable outreach, public speaking, and relationship-building with state and local government leaders from both political parties, engaging frequently with the federally created Natural Resource Damage Assessment (NRDA) Trustee Council.

Policy Director, Louisiana Recovery Agency/Office of Community Development, 2006–2011

- Served in multiple roles of increasing responsibility, through Policy Director. Secured funding, established principles, and created recovery programs to rebuild Louisiana following Hurricanes Katrina, Rita, Gustav, and Ike.
- Identified and helped to remove a bottleneck in the FEMA PA program slowing the rebuilding of projects following Katrina. Over \$650 million of FEMA PA projects valued at \$1 million or more were stuck in FEMA review queues despite statutory deadlines to review or obligate funds. Led a campaign working with the Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), Congressional delegation, and LRA board to remove the bottleneck. Developed tracking mechanism to prevent recurrence.
- Developed recovery programs, allocations, and justifications for over \$2 billion in CDBG -DR funding to help local governments implement community-driven recovery programs and to address recovery needs of key industries.
- Developed recovery program, allocation, and justifications that provided \$247 million in FEMA funds augmented by CDBG-DR funds to repair impacted public school districts.

Director of Planning and Research/Senior Consultant, South Carolina Department of Health & Human Services, Columbia, SC, 2003–2006

- Created and directed a new financial research unit that forecast the state's \$4.3 billion Medicaid budget.
- Helped to develop and implement strategies that modernized the agency's health information technology systems.
- Led efforts to implement a non-emergency transportation network.



Economist/Finance Analyst, North Carolina Department of Revenue, Raleigh, NC, 1998–2001

- Conducted economic research and prepared financial estimates, forecasts, and projections of revenue streams using quantitative and qualitative techniques.
- Drafted a report analyzing the effectiveness of the state’s regionally tiered economic development tax credit program and provided recommendations for small businesses that were incorporated into the program.



Michelle Smith

Grant Manager



21 Years of Experience

AREAS OF EXPERTISE

- Disaster Recovery
- HUD Community Development Block Grant (CDBG) Programs
- Environmental Review
- Davis Bacon Labor Compliance
- Uniform Relocation Act (URA)
- Grant Management
- Fair Housing
- Reporting

EDUCATION

- University of Maryland
- St. Phillip's College
- Western Governors University

HIGHLIGHTS

- ✓ **Administered and completed** several CDBG programs.
- ✓ **Experienced in all phases of CDBG administration**, including procurement, labor regulations, fair housing, Section 504, record-keeping, and reporting.
- ✓ **Serves as primary point of contact** with Infrastructure division of Louisiana Office of Community Development (OCD) for CDBG-DR Grant Management Services. .
- ✓ **Directly assists troubled grantees** by providing technical assistance and support to correct monitoring findings and improve performance.
- ✓ **Capable of managing multiple projects concurrently** in an effective and efficient manner.
- ✓ **Worked with Calcasieu Parish Police Jury** on their CDBG-DR Programs for Hurricanes Katrina, Rita, Gustav, and Ike.

RELEVANT PROJECT EXPERIENCE

Project Manager, Louisiana OCD, Coastal Protection and Restoration Authority (CPRA) Gustav/Ike Recovery Program—PAE, July 2014—present

- Primary point of contact for CPRA related to management of their Gustav/Ike CDBG Disaster Recovery allocation.
- Conducts forensic review and reconstruction of program files, coordinates with CPRA staff to review invoices and prepare Requests for Payment for eligible expenditures, prepares project applications and amendments, assists with subgrantee monitoring, and provides general program management and oversight.

Project Manager, Louisiana OCD, CDBG-DR Programs—PAE, July 2014—present

- Serves as primary point of contact for OCD staff.
- Works with OCD to develop task orders, including scopes of work and deliverables.
- Helps prepare for HUD monitoring.
- Coordinates invoicing and payment process for contract.
- Provided day-to-day management and oversight of subcontractors, including work assignments, review of deliverables, and coordination of service delivery.



TRAINING

- Multiple CDBG Trainings and Workshops
- HUD Environmental Review Record (ERR) Trainings and Workshops
- Davis Bacon Labor Compliance Workshops and Training
- HUD Uniform Relocation Act (URA) Training

Grant Manager, Calcasieu Parish Police Jury, Hurricanes Katrina, Rita, Gustav, and Ike CDBG-DR—PAE, Calcasieu Parish, LA, 2008–present

- Serves as primary point of contact for CPPJ throughout their K/R Program and their G/I Program.
- Works to gather information required for pre-application and application development for disaster recovery projects.
- Assists with preparation of ERRs, reviews invoices and prepares Requests for Payment, prepared Recovery Proposal and subsequent Amendments, prepared of Tier 1 budget revisions.
- Participated in progress meetings with Parish and OCD, and conducted overall program management and oversight.
- Provided technical assistance on monitoring Subgrantees.

EMPLOYMENT HISTORY

- Pan American Engineers, 2000–present

EDUCATION

Bachelor of Science | 2006 |
Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | TX License No. 111792

PERSONAL BIO

Ms. Wilson is a Grants Manager and licensed professional Civil Engineer with more than **16 years of experience** of grant administration and project management for publicly funded infrastructure projects .

PROJECT EXPERIENCE

LOUISIANA WATER SECTOR PROGRAM, ARPA – GRANT APPLICATION, 2022 CONSOLIDATED SANITARY SEWER IMPROVEMENTS BELLE ROSE, LA

Ms. Wilson served as the Grant Writer responsible for developing the funding application to the Louisiana Water Sector Program on behalf of Assumption Parish. The improvements consist of a new resilient and sustainable consolidated sewer collection system for approximately 125 resident connections along Ewell and Virginia Lanes. The residences are currently served by individual household treatment systems with effluent reduction waivers allowing flow into the adjacent ditch system and ultimately contributing to contamination of Bayou Lafourche. The upgrades include installation of sewer pipe, lift stations and significant expansion of the existing plant to accommodate the additional flow. This project directly benefits area residents as well as the 300,000 residents of the 5-parish region served by Bayou Lafourche. The project has been recommended for award by the Louisiana Office of Community Development and approved by the Louisiana Water Sector Commission.

AIRPORT TERMINAL PROGRAM, IJJA – GRANT APPLICATION, 2022 NEW AIRPORT TERMINAL BUILDING SOUTH LAFOURCHE LEONARD MILLER, JR. AIRPORT (GAO), GALLIANO, LA

Ms. Wilson served as the Grant Writer responsible for developing the funding application to the Federal Aviation Administration on behalf of the Greater Lafourche Port Commission. The improvement consists of construction of a new, resilient and sustainable executive level Terminal at GAO. The project will allow for improved customer service and connectivity as well as the opportunity to attract new business for travelers across the Gulf, into and through south Louisiana. The project provides local, regional and national benefit and is currently awaiting award announcements for the FY2023 ATP.

AVIATION DEVELOPMENT PROGRAM MANAGER – 2013-2022 LOUISIANA DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT BATON ROUGE, LA

Ms. Wilson was responsible for the oversight, development and management of the \$28M Airport Construction and Development Priority Program which included annual development, review, implementation and management of the aviation grant program for 69 Louisiana public-use state system airports. Her responsibilities also included providing assistance in pursuit of alternative funding.

EDUCATION

Masters of Science | 2016 | Civil Engineering

Bachelor of Science | 2010 | Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 39647

PERSONAL BIO

Mr. Jeanice is the Lead Engineer for Flood Control with more than **13 years of engineering experience** in civil and **flood protection projects**, which includes **project management**, construction administration, engineering and design, design reports, and developing operation and maintenance plans. The majority of this experience has come from working with Terrebonne Parish Consolidated Government and Terrebonne Levee & Conservation District on **flood protection projects** with a focus on pump station, floodgate, and lock systems design and construction management.

PROJECT EXPERIENCE

BAYOU TERREBONNE LOCK MONTEGUT, LA

Mr. Jeanice performed Project Management duties consisting of developing original construction estimate and engineering fee proposal, coordinating project design components, leading project team meetings, managing project budget, coordinating with client, coordinating with engineering subs, and project scheduling for the design of a braced floodwall system with miter gates. Mr. Jeanice also was Project Manager over the Construction Management portion of the project.

ELLIOT JONES DRAINAGE CONVEYANCE & PUMP STATION GIBSON, LA

Mr. Jeanice performed Project Management duties consisting of developing original construction estimate and engineering fee proposal, coordinating civil site work and structural design components, leading project team meetings, managing project budget, coordinating with client, coordinating with engineering subs, and project scheduling for 1000 cfs pump station and conveyance channel.

HANSON CANAL DRAINAGE CONVEYANCE & PUMP STATION GIBSON, LA

Mr. Jeanice performed Project Management duties consisting of developing original construction estimate and engineering fee proposal, coordinating civil site work and structural design components, leading project team meetings, managing project budget, coordinating with client, coordinating with engineering subs, and project scheduling for 1000 cfs pump station and conveyance channel.

PETIT CAILLOU LOCK TERREBONNE PARISH, LA

Mr. Jeanice performed project management duties consisting of developing original construction estimate and engineering fee proposal, coordinating project design components, leading project team meetings, managing project budget, coordinating with client, coordinating with engineering subs, and project scheduling for the design of a new miter gate structure, consisting of the fabrication and installation of two (2) steel double leaf gates that rest on a pile supported, 4 ft. thick concrete sill slab. In addition, 173 linear ft. of steel sheet pile wall was driven with all sheet pile braced with plumb-batter pipe pile connections (14" & 12" diam.).

EDUCATION

Master of Science | 2007 | Civil Engineering

Bachelor of Science | 2004 | Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 37133

PERSONAL BIO

Mr. Donnes has **12 years of specialized structural design experience**. Mr. Donnes is a registered civil engineer as well as a registered Structural Engineer in the State of Louisiana. He is proficient in design and analysis of steel, timber, concrete, and aluminum structures.

PROJECT EXPERIENCE

MINORS CANAL MITER FLOODGATE BAYOU BLACK, LA

Mr. Donnes was the Senior Structural Engineer for the design of a 56' wide miter gate and concrete monolith with braced floodwalls, fenders, generator building, control house, and required levee tie-ins as well as access road. The project is located just north of the GIWW on Minors Canal and will be a part of the Reach A Segment of the Morganza to the Gulf System.

BAYOU TERREBONNE LOCK MONTEGUT, LA

Mr. Donnes was the Senior Structural Engineer responsible for preparation of a preliminary study report and preliminary and final design of a Miter Gate. Proposed Lock System Project includes double Leaf Miter Gate. He is currently preparing preliminary design for the addition of a 600 cfs pump station. This project is part of the Morganza to the Gulf Levee System.

HANSON CANAL DRAINAGE CONVEYANCE & PUMP STATION GIBSON, LA

Mr. Donnes served as the Sr. Structural Lead for this 1,000 CFS pump station project and provided Engineering Design support during Construction and is responsible for overseeing all structural design components of this project. This project is part of the Morganza to the Gulf Levee System.

PETIT CAILLOU LOCK TERREBONNE PARISH, LA

Mr. Donnes served as the Sr. Structural Lead for the design of a new miter gate structure, consisting of the fabrication and installation of two (2) steel double leaf gates that rest on a pile supported, 4 ft. thick concrete sill slab. In addition, 173 linear ft. of steel sheet pile wall was driven with all sheet pile braced with plumb-batter pipe pile connections (14" & 12" diam.).

BUTCH HILL PUMP STATION LAFOURCHE PARISH, LA

Mr. Donnes is the Structural Lead for the 1,200 cfs capacity drainage pump station. The new Butch Hill pump station will house a total of eight (8) vertical line shaft pumps which will be driven by both diesel engines and electric motors. Two diesel generators will be installed as a backup to the electric motors in case of a power outage. The drives for the pumps will be located inside a two-story building to provide weather protection to the equipment and personnel while doing routine maintenance.

EDUCATION

Bachelor of Science | 2002 |
Environmental Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 37243

LSI | LA License No. 548

PERSONAL BIO

Mr. Loeske is a principal, registered professional engineer of the prime consultant with more than **20 years of experience** in **civil/transportation engineering**, preparation of **roadway design** plans to LA DOTD standards. Mr. Loeske has professional experience since 2002, where he has developed, delivered, and managed complex roadway projects for state and local agencies. He has managed multiple **roadway projects** from minor intersection improvements to interstate widening projects involving bridge widening and interchange overpass and ramp modifications, drainage design and lighting systems design.

PROJECT EXPERIENCE

HOLLYWOOD ROAD EXTENSION AND BRIDGE

HOUMA, LA

Mr. Loeske serves as the transportation lead responsible for providing oversight for all necessary engineering and related services required to design a new bridge over bayou black providing a connection from MLK BLVD to la 182 via the Hollywood road extension. This proposed bridge will consist of 3-lanes and pedestrian facilities. Mr. Loeske assisted on the design, QA of plan and profile sheets, typical sections, summary of quantities, construction sequencing, and will serve as the engineer of record for this project.

ASHLAND LANDFILL ROAD

TERREBONNE PARISH, LA

Mr. Loeske served as project manager for this project that consisted of improving approximately 4500 linear feet of an existing gravel-surface access road at the Ashland landfill in Terrebonne parish, Louisiana. The proposed improvement will consist of upgrading the existing gravel-surface road to a new 2-lane undivided Portland cement concrete pavement (pccp). This project also consisted of pavement patching, panel replacement, drainage improvements, utility relocations, access improvements into the landfill facilities, and upgraded a public boat launch along the corridor

FALGOUT CANAL ROAD IMPROVEMENTS

ASCENSION PARISH, LA

Mr. Loeske served as the project manager on this project. GIS provided professional engineering services inclusive of surveying, preliminary design, final plan development, bidding, and construction administration for the improvement recommendations of Falgout canal road in Terrebonne parish. Mr. Loeske oversaw the developed of alternatives for the rehabilitation of the roadway, including a cost benefit analysis. For the recommended alternative GIS provided detailed roadway construction documents.

I-12: LA 21 TO US 190, LADOTD

ST. TAMMANY PARISH, LA

Project Manager responsible for providing oversight for all necessary engineering and related services required to widen and rehabilitate approximately 6 miles of I-12 to the median side from a four-lane freeway section in both East and West bound directions, including auxiliary lanes connecting Pinnacle Parkway across the Tchefuncte River to US 190.

EDUCATION

Master of Science | 1985 | Civil Engineering

Bachelor of Science | 1983 | Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 24038

PLS | LA License No. 4669

PERSONAL BIO

Mr. Plaisance is the **Lead Professional Engineer for Potable Water** with over **35 years of experience** as a Louisiana Registered Civil Engineer and a Licensed Land Surveyor. Mr. Plaisance has provided surveying and designed utility improvements such as **water lines**, booster stations, and sewer systems.

PROJECT EXPERIENCE

WATER LINE RELOCATION AT HIGHWAY 1 IN GOLDEN MEADOW GOLDEN MEADOW, LA

Mr. Plaisance served as the project engineer on this project. He was responsible for coordination with the client. He was responsible for the design of all elements of the project, including the topographic survey and the construction administration of the project. The project consisted of installing approximately 130 linear feet of 14" PVC waterline, 270 linear feet of 18" PVC waterline, 860 linear feet of 20" pe and PVC waterlines, 1,390 linear feet of 22" pe waterline, and four bored highway crossings with a combination of open cut and jack and bore configurations with and without casings.

WATER LINE REPLACEMENT: CLIFF'S LANE GOLDEN MEADOW, LA

Mr. Plaisance served as the project engineer on this project. He was responsible for coordination with the client. He was responsible for the design of all elements of the project, including the topographic survey and the construction administration of the project.

GRAND ISLE STATE PARK MAIN WATER LINE REPLACEMENT GRAND ISLE, LA

Mr. Plaisance served as the project manager on the replacement of the water lines throughout grand isle state park in Jefferson Parish, LA. Mr. Plaisance was responsible for the design of all elements of this project and provided all surveying.

LEEVILLE BOOSTER NO. 1 TO GOLDEN MEADOW FLOODGATE LAFOURCHE PARISH, LA

Mr. Plaisance served as the project engineer on this project. He was responsible for coordination with the client. He was responsible for the design of all elements of the project, including the topographic survey and the construction administration of the project. this project consisted of the installation of 17,400 linear feet of 18" water line and 1,750 linear feet of 36" water line, located in Lafourche Parish, Louisiana. the project had a total cost of \$2.97m split into two phases over a total contract time of 450 calendar days.

EDUCATION

Bachelor of Science | 2009 | Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 40859

PERSONAL BIO

Mr. Gonya is the Lead Professional Engineer for Bridges with over **12 years of experience** in **Bridge Design** in Louisiana, and the preparation of bridge design plans to LA DOTD standards. Mr. Gonya is an experienced Bridge Design Engineer and Project Manager who brings a wide array of knowledge consisting of culvert designs, bridge designs, rehabilitations, preventative maintenance, and bridge widenings involving both rural and urban areas.

PROJECT EXPERIENCE

VALENTINE BRIDGE

LAFOURCHE PARISH, LA

Mr. Gonya served as the lead bridge designer for the new bridge and provided initial inspections of the existing bridge. The proposed bridge will be upgraded to consist of a wider 32' width to allow for DOTD standard 12' lane width, pedestrian walkway, and safe two-way traffic. The proposed bridge will have an upgraded load rating to allow for emergency vehicle traffic via the bridge such as Lafourche Parish ambulances and firetrucks. The mechanical system will incorporate updated winching standards as to remove the winch from being suspended across the marine channel throughout the operation of the bridge.

HOLLYWOOD ROAD EXTENSION AND BRIDGE

HOUMA, LA

Mr. Gonya is the lead bridge designer for the project designing a new bridge over bayou black providing a connection from MLK BLVD. To la 182 via the Hollywood Road extension. This proposed bridge will consist of 3-lanes and pedestrian facilities. Mr. Gonya lead the design, QA of plan and profile sheets, typical sections, summary of quantities, construction sequencing, and will serve as the engineer of record for this project.

LADOTD LOAD RATING CONTRACT – LADOTD STATEWIDE

Mr. Gonya served as a Project Engineer for the load rating of over 600 bridges in various Parishes for LADOTD. He developed procedures and methods for the load rating of various structures and various deteriorated states. He worked closely with LADOTD to update and verify information in the BDEM section 6 load rating chapter. These ratings often required further information be gathered from the field, so Josh oversaw field inspections to collect pertinent data.

MAYFIELD BRIDGE REHABILITATIONS

TERREBONNE PARISH, LA

Josh served as the Lead Inspector and Lead Designer for these two bridge projects. Josh was responsible for the inspection and design of repairs for two Mayfield bridges near Dulac LA. These bridges were damaged from hurricane storm surge and needed emergency inspection and repairs. Josh supervised site inspections, designed cost effective appropriate repairs and oversaw the plan production to expedite the project delivery and repairs to the bridges.

EDUCATION

Bachelor of Science | 2008 | Civil Engineering

PROFESSIONAL REGISTRATION

Civil Engineer | LA License No. 37243

PERSONAL BIO

Mr. Keiser is a Professional Engineer with over **15 years of experience** as a Louisiana Registered Civil Engineer. Mr. Keiser has provided engineering design support for **sewer lift station projects** as well as several storm sewer and drainage projects.

PROJECT EXPERIENCE

MLK BLVD SEWER LIFT STATION

HOUMA, LA

GIS Engineering produced plans, specifications and cost estimates for a new sewer lift station, force and gravity main sewer lines, ROW acquisition, LA DOTD driveway permits, and jacking and boring of pipe beneath LADOTD roadways. Mr. Keiser served as the QA/QC and Construction Manager responsible for reviewing and revising the project design as well as overall project construction management.

NAQUIN SEWER LIFT STATION

HOUMA, LA

GIS Engineering designed the removal and replacement of an existing sewer lift station as well as force and gravity main sewer lines and removal and replacement of concrete roadways above the sewer mains. Mr. Keiser was the Project Manager and Engineer of Record responsible for entire project design, execution, and construction management.

NORTH THIBODAUX WASTEWATER TREATMENT PLANT

CITY OF THIBODAUX

The City of Thibodaux needs to add a new wastewater treatment plant to handle the expansion of Thibodaux north of Bayou Lafourche. This project involved designing new wastewater treatment plant. Mr. Keiser provided all construction management tasks

SOUTH THIBODAUX WASTEWATER TREATMENT PLANT LAGOON DREDGING

CITY OF THIBODAUX

The City of Thibodaux South wastewater treatment plant aeration pond system failed and needed to be dredged. This project involved designing dredging of aeration pond and working with DHH for disposal. Mr. Keiser was the Project Manager/Engineer of Record/Design Engineer responsible for the entire project design, execution, and construction management.

SEWER INFILTRATION PREVENTION AND REHABILITATION PROJECT

HOUMA, LA

Mr. Keiser served as the Project Manager/Engineer of Record responsible for entire project design, execution, and construction management. The project team identified, cleaned, and rehabbed Terrebonne Parish's sewer pipes (clay pipes) in historic Downtown Houma by use of Cured in Place Pipe (CIPP) method.

EDUCATION

PhD | 1993 | Geoscience

MPhil | 1988 | Geochemistry

Master of Science | 1984 | Geology

Bachelor of Science | 1982 | Geology

PROFESSIONAL REGISTRATION

Geoscientist | LA License No. 1217

PERSONAL BIO

Dr. Mohan has over **30 years of permitting** and project management experience and is a certified Project Management Professional (PMP), and Wetland Delineator. He is an **expert** in **Permitting & Regulatory Compliance** including NEPA documentation and mitigation planning, with over 15 years of experience in stakeholder coordination/public involvement.

PROJECT EXPERIENCE

UPPER DELTA WATERSHED PLAN/ ENVIRONMENTAL ASSESSMENT

POINTE COUPEE PARISH, LA

GIS is working to prepare a hydrologic and hydraulic analysis as part of the Watershed Plan and EA for the Upper Terrebonne Basin Watershed using HEC HMS for storm water runoff calculations and HEC RAS for required channel improvements. The total flood protection project area encompasses seven HUC 12 watersheds totaling approximately 225,072 acres.

ASHLAND LANDFILL WATER MONITORING PROJECT

HOUMA, LA

Dr. Menon is leading the monitoring of 14 ground water wells bi annually as per LDEQ's requirements. As the Project Manager Dr. Mohan directs the sampling and analysis of water samples. A report is developed after every sampling and submitted to LDEQ. Also, on behalf of LDEQ, GIS performs inspections of the wells to make sure that they are in good shape.

ELLIOT JONES DRAINAGE PUMP STATION

GIBSON, LA

Dr. Menon Dr. Menon was responsible for obtaining the necessary environmental permits for the proposed 1,000cfs pump station including LDNR: Joint Application Permit- Coastal Use Permit 9CUP), USACE: Department of the Army Permit (404 and Section 10, LDEQ: Water Quality Certification 9WQC).

HANSON CANAL DRAINAGE PUMP STATION

GIBSON, LA

Dr. Menon Dr. Menon was responsible for obtaining the necessary environmental permits for the proposed 1,000cfs pump station including LDNR: Joint Application Permit- Coastal Use Permit 9CUP), USACE: Department of the Army Permit (404 and Section 10, LDEQ: Water Quality Certification 9WQC).

BAYOU PETIT CAILLOU DRAINAGE PUMP STATION

CHAUVIN, LA

Dr. Menon Dr. Menon was responsible for obtaining the necessary environmental permits for the proposed 450cfs pump station including LDNR: Joint Application Permit- Coastal Use Permit 9CUP), USACE: Department of the Army Permit (404 and Section 10, LDEQ: Water Quality Certification 9WQC).



Christy Ogden

Grant Writer



SENIOR GRANT WRITER

EDUCATION

Louisiana State University
Bachelors of Accounting

EXPERIENCE

QES 1 Year
Total 18 Years

CONTACT

(225) 698-1600
cogden@qesla.com

Ms. Ogden has extensive leadership and hazard mitigation experience in traditional Hazard Grant Mitigation and Non-Disaster Grant Programs. She has developed, trained and presented learning tools at the Louisiana Hazard Mitigation Road shows. She has successfully supervised more than 100 project applications across Louisiana for drainage, elevations, reconstructions and elevations in excess of \$ 360 million in newly approved and awarded grant applications . She also provided technical assistance and oversight for the Pre- Disaster Mitigation Grant Program (PDM), Floodplain Mitigation Assistance Grant Program, and the Hazard Mitigation Grant Program (HMGP).

Grants Project QA/QC Manager — Quality Engineering & Surveying

Technical assistance to parish officials and applicants on the full spectrum of FEMA HMA programs. She provides visibility, develops local knowledge of all mitigation programs, and is able to expedite the recovery process, resolve problems in the field. In addition to providing application development assistance, Ms. Ogden is able to interpret processes, policies, and procedures pertaining to FEMA's HMA programs. She is able to identify short and long- term problems that could affect delivery of the mitigation assistance program.

Tangipahoa Parish

HMGP Acquisition/Elevation & Drainage – 5 Projects
25 Elevations, 11 Acquisitions, 3 Drainage
24 properties completed and 12 currently in process.
Working with the homeowners, as well as contractors to ensure mitigation is completed in accordance with State and Federal guidelines.

GOHSEP ~ Closeout Team Leader

Guidance and oversight to the Closeout Specialists preparing documentation, invoices, and information to request reimbursement or close out of Hazard Mitigation



Zachary Gibbons

Grants Writer



GRANT WRITER

EDUCATION

Louisiana State University
Bachelors of Science with
a Minor in Business

EXPERIENCE

QES 2 Years
Total 2 Years

CONTACT

(225) 698-1600
zgibbons@quesla.com

Mr. Gibbons has worked with Hazard Mitigation Grant Programs regarding state declared disasters and Flood Mitigation Assistance grants amongst multiple areas including Rapides Parish, Acadia Parish, St. Mary Parish, and Iberia Parish. Mr. Gibbons am experienced in both the development, approval, and closing of grant applications with knowledge of the necessities and requirements needed for a complete and well managed application. Through the grant application and approval process Mr. Gibbons have been responsible for outreach of applicants to increase awareness of grant opportunities and mitigation strategies. Mr. Gibbons play a key role in the maintenance and organization of application documentation and budgetary information that is submitted to the Governor's office of Homeland Security and eventually to the FEMA. Furthermore, Mr. Gibbons have used disaster funded grants to improve and mitigate projects such as saferoom and 911 centers as well.

Mr. Gibbons serves as the Grant Project Manager for all ongoing St. Mary Parish Grant Projects and monitors all quarterly reports required by FEMA for status on all ongoing projects.

Hazard Mitigation Grant Program 4458-5 Lantz Donahoe Drainage Project (Hurricane Barry Disaster)
Application submitted on behalf of St. Mary Parish to increase culvert size and improve the pumping station in the Bayou Vista Community to reduce flooding amongst the community. Successfully submitted and working towards approval of its application review with communication with the state and federal government.

Hazard Mitigation Grant Program 4080-18 St. Mary 911 Center and Saferoom (Hurricane Isaac)
Successfully submitted and rewarded approval with work towards a total project cost of \$965,350.65. Construction costs were allocated towards a 911 center and a new saferoom for emergency operation personnel.

Flood Mitigation Assistance Grant 2020 St. Mary Parish
Successfully submitted an application of 5 properties with a total project cost of \$874,780.00 in mitigation funding utilizing elevation mitigation activities.

Flood Mitigation Assistance 2021 St. Mary Parish
Developed and application consisting of two properties with a total project cost of \$1,165,525 for residential and commercial properties.



Anna Roberts

Grant Manager



SENIOR GRANT MANAGER

EDUCATION

Nicholls State University
Bachelor's of General Studies

Northwestern State University
Bachelor's of Science

Accounting (ongoing)

EXPERIENCE

QES 0.5 Years

Total 10 Years

CONTACT

(225) 698-1600

aroberts@qesla.com

Ms. Roberts has served in multiple roles in grant programs throughout her career from working at the local level in Slidell, LA on up to state and federal grants at Louisiana State University. In her role as Project Manger at Quality, Ms. Roberts is responsible for monitoring all financial transactions related to grants.

St. Tammany Parish Flood Mitigation Assistance Program 2019

Ms. Roberts assisted homeowners with moving projects into construction from an approved application. Revised budgets to coincide with approved budget and processed cost overruns through GOSHEP/FEMA as a result of change orders due to construction. Assisted with processing monthly invoices. Assisted community with program management, education, and outreach.

Tangipahoa Parish Flood Mitigation Assistance Program 2017, 2018, 2020

Ms. Roberts assisted homeowners with moving projects into construction from an approved application. Revised budgets to coincide with approved budget and processed cost overruns through GOSHEP/FEMA as a result of change orders due to construction. Assisted with processing monthly invoices. Assisted community with program management, education, and outreach.

CITY OF SLIDELL, Louisiana - Grant Administrator

Ms. Roberts maintained records of funding sources & grant applicants; requested funds from granting agents; reconciled grant accounts, ensured compliance with FEMA, Community Development Block Grants (CDBG), Dept. of Interior, LADOTD & FAA. She collaborated with the Finance Director in securing detailed paperwork to help prepare grant budgets and budget amendments. Sustain record of all grant bills and prepare appropriate invoices and collect balances. Ms. Roberts was responsible for upholding thorough documentation for compliance requirements related to grant expenditures and maintaining project records and preparing modifications to resolve various application issues for grant funds. Anna also coordinated with the audit of individual sponsored accounts to safeguard compliance with government & state regulations and used financial accounting systems to track expenditures, monitor systems of checks and balances. Ms. Roberts worked with granting agents for close-out and project audits. Ms. Roberts worked with the drainage engineer to maintain budget, compliance, and project



Anna Roberts

Grant Manager



requirements for FEMA Public Assistance city-wide expansion and upgrade to the drainage system. After rain weather events and tropical storms, Ms. Roberts completed paperwork for Public Assistance reimbursement of emergency expenses.

LOUISIANA STATE UNIVERSITY, College of Engineering - Grant Coordinator

Ms. Roberts worked with engineering departments for post award financial grant management. Ms. Roberts worked performed monthly cost share allocations and reconciliation of grant accounts. Working with Principal Investigator to accurately document and record staff time for university staff Cost Share for grants. Ms. Roberts communicated with graduate students, instructors, university sponsored programs to resolve any issues.

VOLUNTEER ASCENSION - Grant Development Coordinator,

Ms. Roberts was recruited due to knowledge of grant interpretation, grant reports and requirements, including program development, drafting budgets, work-plans, timelines, and all grant-related data & documentation. She was responsible for authoring grants for funding & monitoring requirements for compliance with grant stipulations. She also trained, contacted & organized up to 100 volunteers for service events & fundraisers, while leading social media campaigns and managed all emails using “Constant Contact” software. Ms. Roberts took a role as an emergency command center volunteer and was trained for a disaster.

SOUTH CENTRAL PLANNING DEVELOPMENT & COMMISSION - Grant Manager Assistant

Ms. Roberts joined the planning team to help facilitate Community Development Block Grant Disaster Recovery grants. Managed data, financials, correspondence, recordkeeping and meeting packets for construction projects. Projects included construction projects for parish administration building, community center, water district improvements. Ms. Roberts worked with contracting and sub-contracting companies to maintain Davis Bacon Department of Labor requirements are met. Ms. Roberts worked with he team to survey neighborhood constituents for low-income compliance.



Jacob Reeves

Grant Manager / GIS Specialist



GRANT MANAGER GIS SPECIALIST

EDUCATION

Louisiana State University

Bachelors of Geography

EXPERIENCE

QES 1 Year

Total 4 Years

CONTACT

(225) 698-1600

jreeves@qesla.com

Provide visibility and develops local knowledge of all mitigation programs. He is able to assist applicants with the HMA grant process, meet with homeowners, manage day-to-day activities to keep projects moving forward, and is able to expedite the mitigation process, resolve problems quickly, develop applications through eGrants and LAHM, and help municipalities receive reimbursement funds timely. Additionally, interpreting processes, policies, and procedures pertaining to FEMA's HMA programs.

Grant Manager for The City of Denham Springs FMA

These projects consisted of contacting homeowners with severe repetitive loss (SRL) and repetitive loss (RL) properties to be included in grant funding to elevate structures above the Base Flood Elevation (BFE) or acquire properties. Meetings with homeowners were held to gather information needed to prepare the application. He prepared the application for submittal in 2020, 2021, and 2022. These projects consisted of two (2) acquisition properties and twenty-six (26) elevations. These projects are nearing completion and are within budget.

DOTD Lower Sabine Watershed

GIS Specialist for the project to assist with La Department of Transportation and Development to model the Lower Sabine Watershed in order to become a FEMA partner. He has used his skills with data collection, data analysis, and data visualization to create info graphic maps reflecting collected data across the watershed to allow planning and improvement of the watershed within municipalities. His technical and data collection skills have brought together a web application for La DOTD to show a real time map and allow user to not only view but, interact with the map and submit reports for Areas of Mitigation Interest (AOMI) and areas of frequent flooding that will be reflected within real time, allowing for advanced decision making

Richland Parish FMA

Grant Manager for Richland Parish FMA 2018. This project consisted of two SRL properties, of which both were acquisition mitigation types. Provided Project Management for the Asbestos Removal, Title Procurement, and Demolition of the properties as well as technical assistance and consultation

Livingston Parish Gravity Drainage District #1

GIS Specialist for this project to assist the Gravity Drainage District with database management, design implementation, data analysis, assessment, and map creation. Proficient in all ESRI platforms including ArcPro and ArcMap Online, allowing for visualization of collected data to consult and assess situations within the district to allow for pinpoint decision making and real time data reflection.



Jamie Seal, CFM

Project Manager



PRINCIPAL GRANT PROJECT MANAGER

EDUCATION

Southeastern Louisiana
University Bachelor of Science
in Business Administration

REGISTRATION

-Certified Floodplain
Manager US-07-02732
-Louisiana Floodplain
Manager Association
-Association of State
Floodplain Managers
-Natural Hazards
Mitigation Association

EXPERIENCE

QES 8 Years
Total 17 Years

CONTACT

(225) 698-1600
jseal@qesla.com

Mr. Jamie Seal has secured more than \$170 million dollars in state and federal related program funds for Louisiana communities over the past 17 years. He has overseen the necessary operations of engineers, planners, drafters, and the GIS departments. His experience and tenure within the state and federal funding arena allow him to be the Administrative point of contact for all interactions with parish contacts and homeowners. He is well versed in documentation and procedures including the development of Benefit Cost Analyses (BCA). He provides the knowledge and insight to propel projects from conception and preliminary design, through final design and construction of the final project.

Tangipahoa Parish HMA Grant Management

Program Manager; grant management to Tangipahoa Parish Government for technical assistance and project management related to a special allocation of funding for use in building elevation projects and acquisition projects related to flood damage. Mr. Seal has assisted Tangipahoa Parish with FEMA grants since 2014.

Skinner Drive Drainage Improvement Project

Mr. Seal served as the principal project manager for the Skinner drive project in Tangipahoa. QES was responsible for surveying the area and conducting a Hydrologic study of the drainage. Mr. Seal was the primary liason with the parish, and was responsible for keeping parish officials up to date.

West David Drive Drainage Improvement Project

Quality Engineering & Surveying, LLC was selected to complete a hydrologic study and provide plans for the installation of a new subsurface system along West David Drive, cleaning of outfall ditches and regrading of the pavement to the appropriate slope. Funding for this project was acquired from 2016 Floods HMGP. Mr. Seal served as the principal project manager.



Edward Anthony, PMP

Project Manager



PROJECT MANAGER

EDUCATION

Jackson State University
Master of Arts in Urban and Regional Planning: Urban Design

Alcorn State University
Bachelor of Science in Geographic Information System: Natural resource Management

REGISTRATION

Project Management Professional (PMP)

EXPERIENCE

QES 2 Years
Total 12 Years

CONTACT

(225) 698-1600
eanthony@qesla.com

Edward is a motivated planning and project management specialist, possessing 11+ years of progressive experience in assessment, consulting, project management, and planning projects across multiple professional industries. Acquired specialized project management experience while working in private industry as part of teams providing large and small-scale contractual services to local governments

LIVINGSTON PARISH GRAVITY DRAINAGE DISTRICT 1 – Public Assistance Funding & Debris Assessment

Following a storm event, Edward led the public assistance documentation process of impacts generated by Hurricane Ida to the Livingston Parish Gravity Drainage District One. Services included risk mapping, assessment, database management, and planning implementation. Edward strategized with field crews to provide photos, GPS coordinates, and estimates of debris quantities in development of a damage inventory meeting FEMA guidelines. He coordinated specialized meetings and communications with FEMA, GOHSEP, NRCS, DEQ, and local government officials. Edward managed the FEMA grants portal to upload all costs, reports, budgets, communications, and narratives detailing the events taken by LPGDD1 to alleviate flood risk preceding and following Hurricane Ida.

ST. MARY PARISH HAZARD MITIGATION PLAN UPDATE & CALCASIEU PARISH - Hazard Mitigation Plan

Mr. Anthony led efforts to provide a complete Hazard Mitigation Plan Update as part of project management services for St. Mary Parish. The update includes updated planning processes, maps, natural hazard profiles and mitigation projects to be included in the full 2020 plan update document submitted to the Governor’s Office of Homeland Security and Emergency Preparedness (GOSHEP) and the Federal Emergency Management Agency (FEMA). These updates were presented over the course of three public meetings to the Hazard Mitigation Plan Update Steering Committee, stakeholder interviews, and coordination of updates to ensure meeting Hazard Mitigation Planning standards set for by FEMA, GOHSEP, 44 CFR 201.6, and the Community Development Block Grant - Mitigation (CDBG-MIT) Program.

For Calcasieu Parish, Mr. Anthony led efforts to provide a complete Risk Assessment section that includes updated data maps, natural hazard profiles, and narrative descriptions to be included in the full 2020 plan update document submitted GOSHEP and FEMA.

EAST BATON ROUGE CITY/PARISH - Substantial Damage Properties

Edward worked to support the EBR Department of Development - Subdivision and Floodplain Management Office with damage determinations from impacts of the Great Flood of 2016. As project lead, he coordinated the review of appeal applications for completeness including required records, receipts, & documentation in compliance with SI /SD Desk Reference FEMA P-785. He provided detailed information about residents’ grants and potential financial assistance for mitigation. Worked in collaboration with the EBR Floodplain Manager and any & all FEMA, Federal, and State resources assigned to EBR. Advised the Chief Engineer of Development / EBR Floodplain Manager on the status of the



Edward Anthony, PMP

Project Manager



SD mitigation efforts with weekly updates & reports.

LOUISIANA DEPARTMENT OF TRANSPORTATION & DEVELOPMENT - National Flood Insurance & Cooperating Technical Partners Program

The Louisiana Department of Transportation and Development (LADOTD) engaged the professional program management, engineering, and surveying services of our Quality Engineering consulting team to accomplish the goals of the FEMA National Flood Insurance Program (NFIP) and the Cooperating Technical Partnership (CTP) Programs. As the project manager, Edward will lead the consultant team in the packaging, delivery, and communication of deliverables in a variety of formats and methods as required by the contract between LADOTD. QES is completing discovery efforts and may be required to perform some or all the following tasks: develop base-level engineering, hydrologic and hydraulic analysis, field surveys, numerical modeling, and community engagement

CITY OF JACKSON CONSENT DECREE – Debris, Manhole, & Pipeline Assessments

Edward contributed to the project team as a Data Analyst, Researcher, Manhole & Pipe Assessor, and Field Manager on the Consent Decree City of Jackson. This program was estimated to be a 17.5-year and cost \$400 million. He worked on multiple phases of the program supporting projects to assist in the elimination of all sanitary sewer overflows in the Jackson, MS metro area. Key deliverables were West Bank Interceptor (WBI) - Debris Assessments and WBI Condition Report that was used in the creation of all plans, measures, and reports for construction and maintenance, scheduling, and updates to operational requirements.

CITY OF JACKSON/HINDS COUNTY – Debris Removal

Edward has experience working in the recovery of communities after being significantly impacted by disasters or weather events. As a Field Debris Monitor, he served as an on-site monitor for the removal, and disposal of disaster-generated debris due to tornadic activity in the Jackson, MS metro area. As a field monitor, he worked with field crews to scout and update GIS maps, and document debris removal quantity, location, and type, across the Jackson, MS metro area.

LOUISIANA WATERSHED INITIATIVE (LWI) Region IV - Watershed Coordinator

Mr. Anthony helped develop a regional approach that identified problems, developed solutions, and trained for future mitigation of water in the Sabine and Calcasieu Watershed. Other tasks: coordinated regional steering committee meetings, managed stakeholders, data collection, and analysis of initiatives and supporting activities for Louisiana Watershed Initiative. These efforts were vital to provide long-term solutions for the Region 4 watershed. Mr. Anthony led QES efforts to facilitate decisions regarding best land use, policy, and mitigation activities, and ensured an equitable planning process was implemented.

LOUISIANA WATERSHED INITIATIVE (LWI) - Round 1 Applications

Mr. Anthony assisted in the development of a regional approach to the HMGP allocation of \$25 million as a result of the August 2016 Flooding (DR-4277), which is viewed as a model of collaboration and cooperation for Louisiana's Watershed Initiative. Quality Engineering and Surveying developed and submitted over 25 Louisiana Watershed Initiative projects in the first round of CDBG funding. Projects included stormwater management plans, drainage improvements, hydrologic and hydraulic studies, acquisition of flood-prone regional areas, and safe rooms. The application was determined to be 1 of 47 applications eligible through a competitive process of 300 applications submitted across the state.



Deric Murphy, PE, LSI

Engineer/Architect



PRINCIPAL ENGINEER

EDUCATION

Louisiana State University
Bachelor of Civil Engineering

REGISTRATION

Professional Engineer
Louisiana No. 29602

Professional Engineer
Mississippi No. 27232

Land Surveyor Intern
Louisiana No. 427

EXPERIENCE

QES 13 Years
Total 23 Years

CONTACT

(225) 698-1600
dmurphy@qesla.com

Mr. Murphy is the QES principal in charge and serves as president. He is a licensed Civil Engineer and a Land Surveyor Intern with 22 years of experience designing, reviewing, surveying, and managing multiple types of projects for both public and private sectors. He works on and provides advisory services for civil design, land development projects, master planning, feasibility studies, due diligence and codes and ordinance research. Mr. Murphy engages in a project phases including conceptual design, cost estimating, final design, construction administration, public outreach, and interaction with relevant governmental agencies.

Iberia Office of Emergency Preparedness / 911 Communications District Safe Room

QES is tasked with providing all aspects of program and project management overseeing the design and construction of the Safe Room for Iberia Parish Government's (IPG) Office of Emergency Preparedness. This includes all management of grant reimbursement, program and project management for the project. The Safe Room will provide near absolute life safety for approximately 300 people. It is a dual use Hurricane Safe Room. When not in use, the Safe Room will serve as the Parish's 911 Communications Center to handle all Emergency-related communications for citizens and area law enforcement. The Safe Room is built in excess of the 500-year floodplain and designed to withstand wind speeds in excess of 200 mph. All design and construction is in congruence with both ASCE 24 and FEMA P-361 guidelines for Hurricane Safe Room Design and Construction

St. Mary Parish 911 Center Safe Room and Wind Retrofit

Mr. Murphy was the lead design professional for the project. QES designed a pre-fabricated safe room for installation at the Parish 911 Center. As a critical public facility, the need for constant human presence to maintain communications during a disaster or severe weather event is crucial. Along with the pre-fab safe room, QES has designed a system of hardening and wind-resistant construction materials for use in protecting and increasing the resiliency of the entire envelope of the structure and not solely to the safe room area.

Breaux Bridge Manor Drainage Improvements

QES was selected to complete the studies and design of the Breaux Bridge Manor Drainage Improvement project. The project will remove an existing box culvert that is set at the wrong elevation along Doyle Melancon Road in Breaux Bridge, LA. A larger culvert will replace the existing culvert and will be set at the appropriate elevation to ensure proper conveyance of water in the drainage area.

Livingston Parish Gravity Drainage District No. 1 Watershed Program Management

Mr. Murphy oversaw all construction and development for the Livingston Parish Gravity Drainage District No. 1. QES also served as the professional of record reviewing all development within the district. Mr. Murphy additionally bridged the gap between the mission of the Livingston Parish Gravity Drainage District No. 1 and the Community Rating System to benefit the City of Denham Springs.



Jay LeBlanc Jr, PE

Engineer/Architect



ENGINEERING MANAGER

EDUCATION

Louisiana State University
Bachelor of Civil Engineering

REGISTRATION

- Louisiana Professional
Engineer # 30566

EXPERIENCE

QES 2 Years
Total 22 Years

CONTACT

(225) 698-1600
jleblanc@quesla.com

Jay LeBlanc is the Chief Operating Officer at QES. Mr. LeBlanc has over 22 years of experience in project management, civil design, and environmental services. Most recently, he was responsible for managing and leading office engineers and designers focusing on utilization, forecasting, and mentoring. After graduating from LSU in civil engineering in 1997, he has worked for both local and national level firms, gaining a wide range of knowledge associated with commercial site design. As a project engineer and manager, Mr. LeBlanc has experience on multiple road and dredging projects, a multi-story parking garage, new airport terminal facility, multiple sanitary sewer lift stations, port bulkhead projects, as well as experience with environmental projects such as subsurface site investigations, groundwater sampling, and landfill quality assurance/quality control.

FEMA Individual Assistance - Technical Assistance Contract

Oversaw statewide property feasibility assessment for both group and individual housing solutions of displaced residents resulting from Hurricanes Katrina and Rita. Managed assessment process of 35,000 individual properties including over 200 engineers, technicians, and support staff, for potential group and individual housing. Coordinated assessment process with USACE to ensure quality control of preliminary site selections. Reported and tracked daily field activity by utilizing real-time web-based tools. Coordinated screening, hiring, and training of potential assessors.

Baton Rouge Metropolitan Airport Parking Garage

Phase III (\$10M) Design for a new five-story parking garage facility at the Baton Rouge Airport. Other design components included a new 150 foot covered pedestrian walkway and a new access roadway. Project Manager - managed the design of the new parking garage and other design components. Managed architectural, structural, mechanical, electrical, and civil design components. Tracked schedule and design progress plus maintained regular coordination with the client. Responsible for approval of sub-consultant invoices and invoices to client. Managed construction administrative tasks including review of RFI's and submittals, review of contractor pay application and progress submittals, and periodic site inspections for compliance with bid documents.

LADOTD - Stage 0 Feasibility Studies and Stage 1 Planning and Environmental Studies Project Manager

Managed Stage 1 Planning and Environmental Studies for an 8-mile portion of LA 447 in Livingston Parish, LA, and for the Future I-49 South (Raceland to Westbank Expressway) in Jefferson, Lafourche, and St. Charles Parishes, LA. Services include Line and Grade Study, Environmental Assessment, and Conceptual Design. Managed Stage 0 Feasibility Studies for LA 384 between Big Lake Road and McNeese Street (LA 3186) in Lake Charles, LA and for LA 328 corridor between Latiolais Drive and Julie Street, as well as to the LA 328 interchange with I-10 in Breaux Bridge, LA. Services included examining the feasibility of making capacity and mobility improvements.



William Purser, PE

Engineer/Architect



ROADWAY/TRAFFIC ENGINEERING MGR

EDUCATION

University of Idaho
Bachelor of Civil Engineering

REGISTRATION

- Louisiana Professional
Engineer # 29357

EXPERIENCE

QES 8 Years
Total 20 Years

CONTACT

(225) 698-1600
wpurser@qesla.com

Mr. Purser has over twenty years of increasing responsibility in Civil Engineering and Public Works projects in Tennessee, Mississippi, Louisiana, Texas, and Alabama. Mr. Purser demonstrates excellent skills in engineering, project design, cost estimation, and working within tight budgets and timelines. As an experienced project manager, he has been responsible for seeing multiple projects through from initial surveys and planning to final bids and completion. Mr. Purser has extensive experience across core civil engineering disciplines of roadway/transportation, drainage, waterline, and site design.

Skinner Drive Drainage Improvements

Mr. Purser supervised the engineering department design activities for proposed flood mitigation of a residential subdivision community.

Breaux Bridge Manor Drainage Improvements

Mr. Purser is the Senior Engineer on this project. His role includes overseeing the drainage study and recommendations. QES was selected to complete the studies and design of the Breaux Bridge Manor Drainage Improvement project. A study of 603 acres was completed. The project will remove an existing box culvert that is set at the wrong elevation. A larger culvert will replace the existing culvert and will be set at the appropriate elevation to ensure proper conveyance of water in the drainage area.

Boudreaux to Gilmore Drainage Improvements

Mr. Purser is the Senior Engineer on this project. His role includes overseeing the drainage study and recommendations. The Boudreaux Street to Gilmore Drive Drainage Improvements project will convert 1,117 lineal feet earthen ditch into a subsurface drainage system that backs up and causes water to pond in a residential subdivision in which houses flood on a regular basis. Grays Creek Drainage Improvements, Livingston Parish, LA
Mr. Purser is the Senior Engineer on this project. His role includes overseeing the drainage study and recommendations. QES was selected to provide surveying and engineering services for a drainage improvement project for Gray's Creek. At approximately eighteen (18) miles, Gray's Creek is the largest drainage project to be undertaken in Livingston Parish. QES utilized three full-time survey crew and staff and professional engineers to develop a solution to reduce the effect of inland flooding in Livingston Parish.



Rebecca Lala, PE

Engineer/Architect



TRAFFIC ENGINEER

EDUCATION

Louisiana State University
Bachelor of Chemical
Engineering

REGISTRATION

Louisiana Professional
Engineer # 31781

Professional Traffic Engineer
2282

EXPERIENCE

QES 2 Years
Total 19 Years

CONTACT

(225) 698-1600
eanthony@qesla.com

Rebecca has 19 years of traffic engineering experience performing traffic studies using traffic modeling software such as HCS, Sidra, VISSIM, Synchro and Vistro. Becky has performed countless traffic studies throughout her career including, but not limited to, subdivisions, shopping centers, gas stations, convenience stores, fast-food restaurants, banks, car washes and multi-use developments. Planning level traffic study experience includes safety studies, feasibility studies, Stage 0 studies, Roadway Safety Assessments (RSA) and corridor studies, meeting LaDOTD and FHWA requirements where applicable. Becky has extensive experience with signal warrant analyses as well as signal design, optimization, and synchronization for existing and proposed signalized intersections. She has led the traffic analysis of intersection and interchange projects to demonstrate how proposed changes would improve traffic flow and safety, including a concept model in VISSIM of a new Interchange along I-12, which was ultimately built in 2009. She has previous experience as a Parish Traffic Engineer, where she had the opportunity to apply Access Management principles and techniques in several projects throughout her career, including projects implemented as part of the American Recovery and Reinvestment Act of 2009 (ARRA) in partnership with LaDOTD.

Various Traffic Studies, Louisiana:

Work as a Traffic Engineer performing several traffic impact analyses (TIA's) for commercial and residential developments throughout the State. Each TIA is performed using HCS, Vistro, and/or Sidra as applicable. Analysis includes turn lane warrants, signal warrants, safety assessments and capacity analysis for stop controlled, signal controlled and roundabout intersections. Analyze and design traffic signals for proposed access to developments as well as existing intersections where signal upgrades are required. Perform traffic signal timing optimization and synchronization for existing and proposed signalized intersections. Traffic Engineering requirements and guidelines per LaDOTD are followed.

Regional Traffic Signal Operations, Regions 2 and 3, Georgia:

Senior Traffic Signal Operations Engineer (TSOE). Review the field work diagrams and data collection for 269 intersections within the State of Georgia for completeness and accuracy. Intersection Diagrams, Clearance Calculation Spreadsheet, Traffic Signal Operations Report (TSOR) and TEAMS database are checked and updated as necessary. Tasks performed include Clearance Interval Calculation updates, signal system database updates, recommendations for design and operational improvements at each intersection, and remote implementation of the new traffic signal timing parameters and coordinated timing plans at intersections and corridors across the state. Client: Georgia Department of Transportation (sub to Jacobs).



Rebecca Lala, PE

Engineer/Architect



Wake Transit Plan, New Bern Avenue Corridor Bus Rapid Transit (BRT) Project, City of Raleigh, North Carolina:

Task manager and project engineer. Traffic analysis of 31 signalized intersections and 23 unsignalized intersections before and after the implementation of transit-only lanes, with Synchro and SimTraffic. Alternatives include reducing the current number of lanes for through traffic along the corridor as well as restricting left turns at several intersections. Tasks include balancing of traffic counts, rerouting of traffic, crash analysis and performing traffic signal analysis at each of the intersections. Perform traffic signal warrant analysis at existing stop-controlled intersections. Use traffic signal analysis results to design recommended changes to traffic signals, signal hardware, and applied traffic operations. Develop appropriate traffic signal timing, synchronization, and 30% design for all scenarios per NCDOT Standards and Congestion Management Guidelines. Client: City of Raleigh, North Carolina

LA 22 from Rou Mar Nei Drive to First Street, Ponchatoula, Louisiana (H.011618):

Project manager and project engineer for the corridor study. Evaluated alternatives to improve safety and mobility along the corridor. Louisiana Department of Transportation and Development (LaDOTD) policies and guidelines were followed, including Access Management and Complete Streets requirements. Tasks included balancing of traffic counts, rerouting of traffic, traffic analysis, crash analysis and performing traffic signal warrants, timing optimization and traffic control design for all intersections as applicable for all scenarios. Synchro, Sidra and Vissim traffic analysis results were used to recommend operational changes to intersections, as well as evaluate capacity and safety of the corridor. Safety Analysis was performed per Highway Safety Manual (HSM) methodology. Client: LaDOTD

LA 22 from Dalwill Drive to Rodger Storme Road, Mandeville, Louisiana (H.011454):

Project manager and project engineer. Evaluated alternatives to improve safety and mobility along the corridor. LaDOTD policies and guidelines were followed, including Access Management and Complete Streets requirements. Tasks included balancing of traffic counts, rerouting of traffic, performing Level of Service (LOS) analysis, and performing traffic signal warrants, optimization and traffic control design for all intersections as applicable. Synchro, Sidra and Vissim traffic analysis results were used to recommend operational changes to intersections, as well as evaluate capacity and safety of the corridor. Safety Analysis was performed per HSM methodology. Client: LaDOTD

US 51 Business from I-12 to Coleman Avenue, Hammond, Louisiana (H.011402):

Project manager and project engineer. Traffic analysis results from Synchro, Sidra and Vissim were used to evaluate alternatives to improve safety and mobility along the corridor. Capacity and safety analyses were performed to recommend operational changes to signalized and non-signalized intersections. LaDOTD policies and guidelines were followed, including Access Management and Complete Streets requirements. Tasks included balancing of traffic counts, rerouting of traffic, crash analysis, and performing traffic analysis of all intersections, both signalized and stop-controlled. Performed traffic signal warrants for all intersections and conducted signal timing optimization for recommended operational changes. Safety Analysis was performed per HSM methodology. Client: LaDOTD

US 51 from West University Avenue to I-55, Hammond, Louisiana (H.011401):

Project manager and project engineer. Performed traffic analysis with Synchro and Vissim to evaluate alternatives to improve safety and mobility along the corridor. Tasks included balancing of traffic counts, rerouting of traffic, performing traffic signal warrants and performing traffic analysis. Traffic analysis results were used to recommend operational changes to intersections, including traffic signal upgrades and optimization as necessary. Sidra was used to evaluate roundabout alternatives. Safety Analysis was performed per HSM methodology. LaDOTD policies and guidelines were followed, including Access Management and Complete Streets requirements. Client: LaDOTD



Yunxiang Fan, PE

Engineer/Architect



WATER RESOURCE ENGINEER MGR

EDUCATION

Louisiana State University -
Master of Civil Engineering

Hunan University - Master of
Environmental Engineering
& Bachelor of Environmental
Engineering

REGISTRATION

Louisiana Professional Engi-
neer # 29592

EXPERIENCE

QES 1 Years
Total 26 Years

CONTACT

(225) 698-1600
pfan@quesla.com

20+ years of broad experience, including senior leadership with P&L responsibilities (\$120 million annual turnover at peak), in civil, municipal engineering, land development, WWTP design-build, construction and stormwater management permitting, project management, business development in the US and abroad. Strong cross-functional skills and business acumen with the ability to execute a wide range of tasks and increase revenues and profitability. Effective communication skills in explaining complex civil engineering concepts clearly and understandably to a variety of professional and non-professional audiences. PE licensed in 22 States (IL, AL, AR, FL, MS, LA, MN, MO, MI, NC, OR, CO, TX, PA, NV, KS, VA, OK, OH, IN, WA, and WI).

Chappeeela Creek Stormwater Retention Planning Project (Tangipahoa Parish, LA)

Mr. Fan serves as the Water Resource Engineering Manager for the Chapapeela Drainage Improvement Project. He is responsible for designing the H&H study, as well as evaluating final possible improvements of Chappeeela Creek watershed, including other upstream branches.

Livingston Parish Gravity Drainage District 1 Watershed Management

Mr. Fan serves as the Water Resource Engineering Manager for the Livingston Parish Gravity Drainage District #1 Watershed Management Project. He currently oversees all hydrologic and hydraulic studies of the watershed from design to completion and is responsible for evaluating the completed HEC-HMS model.

Black Liquor Wastewater Treatment Plan

Tr-Tech J&Y Division was selected as a Turn-Key contractor by AV Cell, Inc. to design and install a Black Liquor Wastewater Treatment Plant. Mr. Fan served as the principal engineer responsible for all calculations to raise the recirculation flow to nearly 7000GPM.

Zero Liquid Wastewater Treatment Plant Basic Engineering Design

Mr. Fan was the president and CEO of Tri-Tech Holding, Inc. when Tri-Tech was selected as a primary engineering consultant to design the Zero Liquid Wastewater Treatment Plant for one of SIPCHEM's refinery plant. Mr. Fan was the principal engineer responsible for designing the ZLD system.



Yangbin Tong, PE

Engineer/Architect



WATER RESOURCE ENGINEER

EDUCATION

Louisiana State University -
Master of Water Resource &
Environmental Engineering

REGISTRATION

Louisiana Professional
Engineer # 45425

EXPERIENCE

QES 1 Years
Total 8 Years

CONTACT

(225) 698-1600
ytong@qesla.com

Mr. Tong has 8 years of experience in civil engineering design and analysis, including Hydrologic and Hydraulic Modeling and Analysis, Stormwater Management, Wastewater Treatment facility design, Flood Mitigation, and Site Development. His past roles cover civil engineering designer, H&H modeler, engineering task coordinator and project manager. He has excellent writing skills in both academic peer-reviewed journal papers and project reports. In addition, he has 2 years of work experience in China focusing on H&H modeling and analysis.

Chappeeela Creek Stormwater Retention Planning Project

QES is awarded by Tangipahoa Parish to perform a comprehensive watershed study for a potential retention pond(s) project. Mr. Tong is the leading engineer to perform Gap Analysis, Data Acquisition, Hydrology and Hydraulics (H&H) Modeling & Analysis, Environment Review and Preliminary Engineering Study.

City of Denham Springs Stormwater Management Program

QES was selected by the City of Denham Springs to develop a Master Drainage Plan based on August 2016 flood inundation and its effects on the City of Denham. Mr. Tong is the leading engineer to perform Gap Analysis, Data Acquisition, H&H Modeling & Analysis, and Preliminary Engineering Study.

Chennault Airport Stormwater Management Plan

CSRS, Inc. was a subconsultant to JESCO, Inc. on the Chennault Airport Stormwater Management Plan. Mr. Tong was the task leader responsible for project coordination, Hydrologic & Hydraulic analysis, project deliverables and reports.

McHugh Road H&H Analysis

The Parish of East Baton Rouge hired CSRS to complete the design work of McHugh Road Improvement as part of the MoveBR program. Mr. Tong was the Project Manager responsible for daily coordination of project progress as well as communication with MOVEBR's Program Management team.

Lacassine Bayou Watershed Modeling

CSRS, Inc. was a subconsultant to C.H. Fenstermaker & Associates, L.L.C. on the Calcasieu Parish Drainage Master Plan. Mr. Tong ran HEC-RAS models to incorporate and compare various pro-posed measures in the Lake Charles Watershed to assess the cost and benefit.



Jacob Murray, EI

Engineer/Architect



ENGINEERING INTERN

EDUCATION

Clemson University
Bachelor's of Environmental
Engineering

REGISTRATION

South Carolina Engineering
Intern # 21298

EXPERIENCE

QES 1.5 Years
Total 2 Years

CONTACT

(225) 698-1600
jmurray@quesla.com

Calcasieu Parish Police Jury ARPA Project Reviews

Quality Engineering & Surveying has been subcontracted by the Calcasieu Parish Police Jury to serve as the engineer subject matter experts for their American Rescue Plan Act (ARPA) grant administration program. Jacob Murrey reviewed water, wastewater, and stormwater projects to determine eligibility under the Final Rule of ARPA.

Livingston Parish Gravity Drainage District No. 1 Watershed Master Plan

Quality Engineering & Surveying was contracted by Livingston Parish Gravity Drainage District No. 1 to develop hydrologic and hydraulic models of key watersheds within their jurisdiction, including Gray's Creek, Allen Bayou, and Felder's Bayou. Jacob Murrey developed HEC-RAS one-dimensional and two-dimensional models to analyze the existing drainage patterns within these watersheds and identify potential improvements projects.

Puerto Rico HMGP Phase I Grant Applications

Quality Engineering & Surveying has been subcontracted by various municipalities throughout Puerto Rico for the development of grant applications through FEMA's Hazard Mitigation Grant Program in order to secure Phase I funding for stormwater management projects. Jacob Murrey has provided support through application drafting, BCA development, hydrologic and hydraulic modeling, and RFI responses in the development of these grants.

Scivique Road Drainage Improvement HMGP Grant Application

Quality Engineering & Surveying was contracted by Livingston Parish Gravity Drainage District No. 1 to perform HMGP grant development services for a drainage improvement project to Scivique Road on Gray's Creek. Jacob Murrey provided hydrologic and hydraulic modeling support in the development of this grant application.



Vincent Orlando, PE

Other Licensed / Certified Professional



CONSTRUCTION ENGINEER

EDUCATION

Louisiana State University
Bachelor's of Civil Engineering

University of New Orleans
Master's of Engineering Man-
agement

REGISTRATION

LA PE.0046350

EXPERIENCE

QES 0.5 Years
Total 7 Years

CONTACT

(225) 698-1600
vorlando@quesla.com

Mr. Orlando has just started working at Quality Engineering & Surveying, LLC. He has previously served as Civil Engineer (P.E.), Program Manager at All South Consulting Engineers, LLC where he specialized in FEMA program management.

Terrebonne Parish School District Hurricane Ida Response

Upon joining the All South Consulting Engineers, LLC team in the weeks following Hurricane Ida, Mr. Orlando worked to ensure emergency work was being procured and completed in compliance with FEMA requirements. His background and experience with water and mold remediation was used to provide checks and balances on existing and proposed water damage remediation contracts and invoices. He also worked closely with other team members as well as with the school board to submit all emergency work (category B) project worksheets to FEMA and transition to permanent restorative work (category C-G). Mr. Orlando continues to advise on and draft various RFP's and contract documents for the school district to ensure FEMA compliance and future reimbursement. He is also providing requests for proposal to all school board clients to use in procuring emergency remediation work in preparedness of future storms.

Lafourche and Saint John the Baptist Parish School Board Hurricane Ida Response

Following Hurricane Ida, Mr. Orlando provided a detailed review of all invoices and contract documents for water damage remediation services. He reviewed the invoices and contract documents for FEMA compliance as well as industry standards. Mr. Orlando also provided review of Insurance adjusters audit of category B invoicing in Saint John the Baptist Parish School District.

North Lafourche Levee District, Saint Bernard Parish Government Hurricane Ida Response

Following Hurricane Ida, Mr. Orlando provided a detailed review of all invoices and contract documents for water damage remediation services. He reviewed the invoices and contract documents for FEMA compliance as well as industry standards

Emergency Restoration, Inc (ERI) – Hurricane Ida Response

In the weeks following Hurricane Ida, Mr. Orlando assisted a local restoration company specializing in storm damage remediation in response to the damages resulting from Hurricane Ida. Mr. Orlando acted as a project manager, overseeing teams of restoration technicians in Jefferson Parish and Saint John the Baptist Parish official buildings. Mr. Orlando has provided professional consultancy and at times, specialized labor for this particular business for many years.



Mason Bonano, PE

Other Licensed / Certified Professional



CONSTRUCTION ENGINEER

EDUCATION

Louisiana State University
Bachelor's of Civil Engineering

REGISTRATION

LA PE.00046424

EXPERIENCE

QES 0.5 Years
Total 4 Years

CONTACT

(225) 698-1600
MBonano@qesla.com

Mr. Bonano has just started working at Quality Engineering & Surveying, LLC. He has previously served as Project Manager and Engineer at Stuart Consulting Group, Inc. where he specialized in Project Management, Construction Administration, Generating Cost Estimates, CAD Designs, Drainage & Pump Calculations, Utility & Client Coordination, and Generating Specifications on municipality projects

Livingston Parish Gravity Drainage District No. 1 Watershed Program Management

Mr. Bonano now oversees all construction and development for the Livingston Parish Gravity Drainage District No. 1 as the program manager. QES also served as the professional of record reviewing all development within the district. Mr. Seal additionally bridged the gap between the mission of the Livingston Parish Gravity Drainage District No. 1 and the Community Rating System to benefit the City of Denham Springs.

West David Drive Drainage Improvement

Mr. Bonano is the project manager of the West David Drive Drainage Improvement Project where he led the grant department in the procurement of necessary funds from the 2016 floods HMGP for an existing neighborhood. This project involved the study and development of plans for the installation of a new subsurface system along the street to provide a clear path to the outfall location. This affects approximately 50 homes.

River Road Drainage Improvement Project

As the project manager Mr. Bonano led the QES team through the HMGP process for the River Road Drainage Improvement Project. This project was necessary to address the flooding issues that existed with cross-drain culverts in an existing neighborhood. This project involved the study and development of plans for the installation of a new subsurface system along the street to provide a clear path to the outfall location. This affects approximately 1000 single home properties

CDBG-DR Parks and Recreation Improvements

Mr. Bonano provided support in Construction Administration post design in the Empire Park Project. This design project involved the development of a new public park in Empire, LA which included multiple pavilions, seating, playground, splash pad/water feature (and all components), and a public restroom. Mr. Bonano's responsibilities included resident inspection, contractor coordination, change order reviews, design plan updates (CAD), product research (Splash Pad and Playground), and the generation of the as-built drawings.



Aaron Brown

Other Licensed / Certified Professional



GIS ANALYST

EDUCATION

Baton Rouge Community College,
Associates of Pre-Engineering

EXPERIENCE

QES 2 Years
Total 7 Years

CONTACT

(225) 698-1600
abrown@qesla.com

Mr. Brown graduated with an Associates Pre-Engineering degree with a focus in Civil Engineering from Baton Rouge Community College in 2016. He has over 5 years of CAD/GIS experience. Mr. Brown has worked on a variety of site development planning projects, roadway design projects, right of way acquisition projects, stormwater management projects, resilient infrastructure planning projects and GIS database maintenance projects. At QES, his responsibilities include civil site design and GIS database management. Mr. Brown is currently working to obtain his GISP certification.

Calcasieu Parish Storm Water Master Plan

Mr. Brown created an online GIS database of critical infrastructure, RL/SRL properties, flood risks, demographic information, and parish drainage projects for the Calcasieu Parish Watershed Master Plan. The Calcasieu Parish Watershed Master Plan project helped to determine areas in need of improvements to mitigate flood risks and included maintaining a GIS database of known infrastructure, risk modeling, and local stakeholder meetings to determine high priority areas of concern.

Ascension Parish August 2016 Flood Extent Modeling

Mr. Brown worked with Ascension Parish to model the August 2016 flood inundation using available river gage data, field survey data, and aerial photos. This data was used to help the parish understand the impacts of the August 2016 flood.

Hurricane Harvey Disaster Recovery (FEMA PREPS Program)

Mr. Brown was a member of the team responsible for the Hurricane Harvey Disaster Recovery through the FEMA PREPS Program. Mr. Brown was responsible for analyzing applicants to determine allocation of disaster recovery resources. The PREPS program provided emergency repairs and power restoration to single-family owner-occupied homes after Hurricane Harvey in Texas.

Livingston Parish Gravity Drainage District 1 GIS Mapping System

Mr. Brown created an online GIS system to manage field collected data for the Livingston Parish Gravity Drainage District 1. Mr. Brown currently maintains data uploaded to the GIS system and performs QA/QC. The Livingston Parish Gravity Drainage District 1 GIS Mapping system allows for multiple field crews to upload drainage related data to a single database which will be used to direct resources to areas of concern.

TAB 2 – HOURLY RATE TABLE

Proposer Name: Hunt, Guillot & Associates, LLC (HGA)

STAFFING AREAS – AREA/POSITIONS	NUMBER OF STAFF AVAILABLE	HOURLY RATE CHARGED	HOURLY RATE PAID
(AREA)	(INFORMATIONAL)	(TO STATE)	(TO STAFF)
Area 1 Pursuing IJJA Grant Funding – GRANT WRITER	5	\$125.00	\$50.00
Area 2 Managing Successful IJJA ACT Grant Applications – GRANT MANAGER	8	\$125.00	\$50.00
Area 3 Project Management – PROJECT MANAGER (Non-Principal)	5	\$160.00	\$64.00
Area 3 Project Management – MANAGER-PRINCIPAL (OWNER)	1	\$200.00	<i>Same as Charged</i>
Area 4 Enhanced Project Management – ENGINEER/ARCHITECT	20	\$185.00	<i>Same as Charged</i>
Area 4 Enhanced Project Management – OTHER LICENSED DESIGN PROFESSIONALS or CERTIFIED PROFESSIONALS	10	\$170.00	<i>Same as Charged</i>

A proposer has the overall responsibility for its staff administration, payroll and staff qualifications. A proposer’s principal may serve in any position as staff to be paid hourly for services personally provided. However, the rate charged vs. the rate paid must be the same for the positions indicated in the table. All final rates payable are negotiable by LITAC and must be approved by the Division of Administration.

STAFFING AREAS – AREA/POSITIONS	LEVEL	HOURLY RATE CHARGED
Area 1 - GRANT WRITER	Senior	\$145.00
	Mid	\$125.00
	Junior	\$105.00
Area 2 - GRANT MANAGER	Senior	\$145.00
	Mid	\$125.00
	Junior	\$105.00
Area 3 - PROJECT MANAGER (Non-Principal)	Senior	\$180.00
	Mid	\$160.00
	Junior	\$130.00
Area 3 - MANAGER-PRINCIPAL (OWNER)	N/A	\$200.00
Area 4 - ENGINEER/ARCHITECT	Senior	\$225.00
	Mid	\$185.00
	Junior	\$140.00
Area 4 - OTHER LICENSED DESIGN PROFESSIONALS or CERTIFIED PROFESSIONALS	Senior	\$190.00
	Mid	\$170.00
	Junior	\$150.00



TECHNICAL ASSISTANCE PROGRAM: CONSULTANT RECOMMENDATIONS



LOUISIANA INFRASTRUCTURE TECHNICAL ASSISTANCE CORPORATION

707 North 7th Street | Baton Rouge, Louisiana 70802

REQUEST FOR PROPOSALS FOR PROFESSIONAL SERVICES RELATED TO LITACORP'S TECHNICAL ASSISTANCE PROGRAM

Request For Proposals and Evaluation Process

- In December 2022, LITACorp published a Request for Proposals (RFP) to solicit responses from consultant firms to assist LITACorp with administering its Technical Assistance Program (TAP). Consultants were instructed to submit a proposal detailing their experience and capacity related to federal grant writing and program administration as well as rural economic development.
- LITACorp received five proposals from consultant firms by the deadline then evaluated each written proposal before inviting all firms to give a presentation via Zoom. LITACorp considered written proposals and virtual presentations for the overall evaluation of each firm before making recommendations to the Board of Directors.

Recommendations

LITACorp recommends the following firms to serve as the primary and secondary consultant firms for TAP:

- 1. Franklin Associates, LLC** (primary consultant firm) is a minority-owned business based in Baton Rouge committed to enhancing communities across Louisiana. In their proposal, Franklin Associates partnered with GrantWorks, Inc. to complement their project management experience with additional capacity for federal grant writing and administration. Franklin Associates and GrantWorks has decades of experience writing successful grant applications for federal funding and grant and project management expertise to help eligible entities successfully obtain much-needed funding to carry out eligible projects. Having worked in all 64 parishes and managed administration of billions of dollars of federal grant funding, Franklin Associates and GrantWorks are uniquely qualified to provide staff support services

to ensure Louisiana communities have access to as much IIJA/BIL funding as possible.

- a. Franklin Associates was founded by lifelong Louisianan, current firm president and sole company owner, Perry Franklin in the wake of Hurricanes Katrina and Rita in 2005 to assist impacted communities throughout southern Louisiana recover and build back better. Seventeen years later, Franklin has built on this foundation, providing grant management and staff augmentation services across the country. Franklin now includes 32 full time staff with reach back to hundreds of Louisiana-based staff to serve all LITACorp's grant application and grant administrative support needs. Franklin exists to serve their clients' grant management needs and is able to nimbly adjust their staffing levels to assist grantees according to funding timelines. In 2020, during COVID-impacted staffing difficulties, their staff numbered 300+ as they responded to disaster-related, federally funded staffing augmentation requests across the state. In addition, their team includes experts in IIJA, ARPA, HUD CDBG and FEMA recovery funding sources so they are adept at deploying large federal grant funding to implement infrastructure and housing improvements and spur economic development.
 - b. Founded in 1979, GrantWorks has assisted more than 450 government entities in designing and delivering a wide range of critical federal and state-funded projects and programs in the areas of infrastructure, housing, transportation, public buildings and facilities, community and economic development, coastal protection, disaster recovery, mitigation, and resilience. With a national workforce of over 390 professionals, including 25+ Louisiana-based staff, GrantWorks continues its mission to develop meaningful partnerships with public sector clients to solve complex infrastructure challenges, improve public service, and build stronger, smarter, and more resilient communities for a better future for all.
2. **Hunt, Guillot & Associates, LLC** (secondary consultant firm) is a firm based in Ruston, Shreveport, Baton Rouge, and Lake Charles (among other locations outside of Louisiana) that submitted a proposal in partnership with Pan American Engineers (PAE), Quality Engineering & Surveying, LLC, (QES) and GIS Engineering (GIS). The team includes all Louisiana-based firms that have supported local governments with applying for and administering federal and state grant applications. HGA has completed more than 750 applications worth more than \$2 billion in funding for over 600 applicants. HGA has a proven track record of successfully supporting over \$20 billion in grant management services for state and local clients to include infrastructure, economic development, and housing projects. The HGA Team has supported clients such as the Greater Lafourche Port

Commission, East Baton Rouge Parish, the City of Lake Charles, and the Towns of Abita Springs and Golden Meadow with their IJIA applications and funding administration. The HGA Team is experienced in rapid ramp-up of projects and can recruit and train large numbers of staff in a short period. While maintaining federal statutory compliance for each project can be a daunting task for local governments, HGA will focus on thoroughly explaining the basics of IJIA compliance and reporting requirements up front. By working directly with local governments and providing educational resources and technical assistance, the HGA Team will contribute to the goal of increasing individual, organizational, and public institutional capacity for project identification, project formation, project implementation, and long-term operations and maintenance.

LITACorp has developed standard operating procedures for managing community outreach and engagement, consultant workflow, and the organizations professional services budget to ensure technical assistance and resources are deployed effectively.

If deemed necessary, LITACorp will release a new RFP to solicit proposals from additional firms to curate a broader vendor list for LITACorp to choose from when assigning consultants to participating communities.

Action Item

- ✓ Leslie Durham requests a Board vote to approve LITACorp to execute cooperative agreements for Franklin Associates, LLC (primary consultant firm) and Hunt, Guillot & Associates, LLC (secondary consultant firm) to assist LITACorp with administration of the Technical Assistance Program



**TECHNICAL ASSISTANCE PROGRAM:
CONSULTANT CONTRACT
FRANKLIN ASSOCIATES, LLC**

AGREEMENT FOR CONSULTANT SERVICES

STATE OF LOUISIANA

PARISH OF East Baton Rouge

THIS IS AN AGREEMENT made as of 1 day of June, in the year 2023 by and between the LOUISIANA INFRASTRUCTURE TECHNICAL ASSISTANCE CORPORATION, a Louisiana non-profit corporation domiciled at 707 North 7th Street, Baton Rouge, Louisiana 70802, (hereinafter called LITACorp), represented by Leslie Durham, its Executive Director, and Franklin Associates, LLC, domiciled at 250 S. Foster Drive, Baton Rouge, LA 70806, (hereinafter called CONSULTANT).

WHEREAS, the United States Congress has enacted Public Law 117-58, known as the Infrastructure Investment and Jobs Act (IIJA), which, among other things, provides funding for State and local governments to invest in needed infrastructure improvements, construction, maintenance, etc.; and

WHEREAS, in Act 497 of the 2022 Regular Session, the Louisiana State Legislature created the Political Subdivision Federal Grant Assistance Fund (La. R.S. 39"100.201) for the administration of a program "to assist political subdivisions with competitive federal grant opportunities made pursuant to the Infrastructure Investment and Jobs Act." As a result of this legislature, a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) established LITACorp to administer these funds on behalf of the Division of Administration; and

WHEREAS, LITACorp is a non-profit organization that was created to administer (1) a *Technical Assistance Program* to assist Louisiana's municipal and parish governments with identifying and applying for grants through the IIJA; and (2) a *Matching Funds Grant Program* to equip local governments with matching funds that can be used to meet the local cost share requirements of federal grant programs funded through IIJA; and

WHEREAS, LITACorp desires to engage the CONSULTANT to render certain professional Project Management services in connection with the assisting municipal and parish governments with competitive federal grant opportunities and effectively administering grant funds.

NOW, THEREFORE, the parties do mutually agree as follows:

I. Employment of Consultant:

LITACorp hereby agrees to engage the CONSULTANT and the CONSULTANT hereby agrees to perform the Project Management Scope of Services set forth under the terms and conditions of this agreement.

II. Scope of Services:

The CONSULTANT shall, in a satisfactory and proper manner, perform the following Project Management services:

A. TECHNICAL ASSISTANCE PROGRAM:

1. Conduct Outreach to Louisiana Political Subdivision

- a. Conduct informational workshops, events, and webinars in all 64 parishes to ensure communities are aware of LITACorp's Technical Assistance Program offerings.
- b. Attend community meetings, events, and conferences to present with or on behalf of LITACorp about upcoming IJA grant opportunities, technical assistance services, and project development/design, etc.
- c. Maintain database of community requests for technical assistance, documentation of services offered per community, applications developed and submitted, etc.

2. Pursue IJA Grant Funding

- a. For each project, create a funding resource roadmap to assist political subdivisions with developing capital stacks (i.e. funding strategy for critical infrastructure projects).
- b. Understand and effectively communicate grant eligibility information, application submittal requirements, grant portal system requirements, and all nuances specific to each application process.
- c. Collect and organize grant application information and instructions, and track FAQs as well as guideline changes.
- d. Prepare and manage grant application timeline, including grant writing schedule, quality assurance/quality control, applicant review/approval, and other key milestones to successfully submit grant applications by their stated due date.
- e. Requests information and conduct research related to the development and submission of grant applications, including participation in federal agency webinars, workshops, or related events.
- f. Collect and organize relevant quantitative data and project narrative, and develop appropriate maps, tables, charts, and graphics for grant applications.

- g. Synthesize data/information and transform it into compelling narratives, exhibits, attachments, and other supplemental materials appropriate to the specific grant programs to demonstrate eligibility, need, and competitiveness of the grant applications.
- h. Develop or provide technically-sound conceptually project cost estimates, if not readily available, to outline base cost of applicant projects.
- i. Conduct public outreach, if applicable, such as public and stakeholder meetings to fulfill grant programs' community engagement requirements and to build awareness of and support for applicant projects.
- j. Draft and obtain letters of support from federal, state, and local elected officials in a timely fashion to submit with grant applications.
- k. Develop project budgets and justifications in accordance with grant solicitation requirements and in alignment with local and state policies and regulations.
- l. Conduct detailed benefit cost analyses as required by various grant programs.
- m. Gather required environmental data, permits, and approvals.
- n. Edit draft proposals for consistency of messaging, ensuring integration of grant requirements and completeness prior to applicant final review and submittal to grantmaking agency.
- o. Ensure each grant package is prepared and submitted in a timely fashion, with all elements adhering to grant requirements and evaluation criteria.
- p. Conduct a quality assurance/quality control process to ensure accuracy and completion of applications.
- q. Ensure applicants have access to grant submittal portals and, as needed, upload information into agency grant portals for applicants' convenience.
- r. Collect and organize all materials prepared for any grant application and submit final versions to applicant and LITACorp as part of a close-out process.
- s. Assist with the coordination of regional and statewide projects to maximize impact and increase the competitiveness of submitted grant applications.

3. Manage Successful IJA Grant Applications

- a. Manage grantee compliance in accordance with federal, state, and local policies and procedures.
- b. Create and maintain project files that demonstrate compliance with all applicable federal, state, and local regulations.
- c. Coordinate and manage the creation and submittal of all reports required of grant recipients by the awarding agency and/or federal and state law.
- d. Streamline reporting processes to ensure continuous compliance with federal regulations governing grant administration requirements, communicate reimbursement requests and reporting requirements to communities, and implement grants management and monitoring processes to collect information necessary for fund requests and post-award reporting.
- e. Establish internal financial tracking systems, if not yet established, to ensure funds are expended for the specified purposes and within established timelines.
- f. Coordinate with applicants and relevant stakeholders to obtain all necessary costs estimates and other documentation to develop grant proposals and comply with required pos-award reporting.
- g. Track and monitor all project activities and cost expenditures, including indirect costs, to ensure grant funds are expended in accordance with federal guidance, policies, and regulations.
- h. Monitor and evaluate the progress of projects post-award in accordance with the approved scope of work and budget outlined in grant applications.
- i. Complete close-out reporting requirements for all communities to demonstrate the scope of grant-funded work was fully implemented, all obligated funds were expended appropriately, and grant conditions were implemented and documented as required.

4. Project Management

- a. Comprehensive management and coordination of the Technical Assistance Program, including all grant applications, projects, and consultant staff.
- b. Provide LITACorp with detailed weekly updates regarding community outreach and engagement activities, project pipeline, IJA grant programs, regional collaboration opportunities, grant development/submission, ongoing challenges, and other related activities.

- c. Prepare formal responses to address LITACorp, applicant, and constituent questions/inquiries and requests for information.
- d. Attend relevant community meetings, workshops, events and hearings (as necessary).
- e. Assist LITACorp with identifying, strategizing, and prioritizing funding needs for community projects, including matching funds.
- f. Meet regularly with LITACorp and applicants to discuss potential grant application and project management matters, such as appropriate grant programs, project scope of work, and most competitive strategies to deploy to be awarded IJA grant funds.

5. Professional Technical Support

- a. Provide, accommodate, or secure professional design and technical services, which all require prior approval of LITACorp to:
 - i. Ensure applicants have access to licensed engineers and architects who can create and submit the designs and specifications necessary to illustrate feasibility and cost estimates for grant applications; and
 - ii. Certify project plans and specifications, oversee procurement processes, and manage construction.

III. Times of Performance:

The services of the Consultant shall commence on the date of signing of this Agreement and all proper work order approved by LITACorp, an example of which is attached hereto as EXHIBIT A. Services shall be provided on a per hour basis as set forth in the Rate Sheet attached as EXHIBIT C. Such services shall be continued in such sequence as to assure their relevance to the purposes of this Agreement. All services shall be rendered in accordance with this Agreement and the Standard Operating Procedures for LITACorp Consultants, attached hereto as EXHIBIT B.

IV. Access to Information:

It is required that all information, data, reports, records as are existing, available and necessary for the carrying out of work outlined above shall be furnished to the Consultant by the LITACorp. No charge will be made to the Consultant for such information and the LITACorp will cooperate with the Consultant in every way possible to facilitate the performance of the work described in this Agreement.

V. Compensation and Method of Payment:

Consultant will be paid at the rate of \$ _____ per hour for work performed in accordance with this agreement. Consultant will submit an itemized invoice setting forth the time spent and services rendered, and the company will pay Consultant the amounts due as indicated by invoice submitted by Consultant within thirty (30) days of receipt. All compensation for services shall be rendered and paid in accordance with this Agreement and the Standard Operating Procedures for LITACorp Consultants, attached hereto as EXHIBIT B.

VI. Independent Contractor:

Both LITACorp and Consultant agree that Consultant will act as an independent contractor in the performance of its duties under this contract. Accordingly, Consultant shall be responsible for payment of all taxes including Federal, State, and local taxes arising out of the consultant's activities in accordance with this contract, including by way of illustration but not limitation, Federal and State income tax, Social Security tax, Unemployment Insurance taxes, and any other taxes or business license fee as required.

VII. Ownership of Documents:

All documents and data are the property of LITACorp. Consultant may retain reproducible copies of documents and data.

VIII. Professional Liability:

Consultant shall be responsible for the use of reasonable skills and care benefiting the profession in the preparation of materials for the project covered by this Agreement.

IX. Indemnification:

Consultant shall comply with the requirements of all applicable laws, rules and regulations in connection with the services of Consultant, and shall exonerate, indemnify, and hold harmless LITACorp, its officers, agents and all employees from and against them and local taxes or contributions imposed or required under the Social Security, Workers' Compensation and Income Tax laws. Further, Consultant shall exonerate, indemnify, and hold harmless LITACorp with respect to any damages, expenses or claims arising from or in connection with any of the work performed or to be performed under this Agreement by Consultant. This shall not be construed as a limitation of the Consultant's liability under this Agreement or as otherwise provided by law.

LITACorp shall exonerate, indemnify, and hold harmless Consultant, with respect to any damages, expenses or claims arising from or in connection with any of the work performed or to be performed under this Agreement by LITACorp. This shall not be construed as a limitation of LITACorp's liability under this Agreement or as otherwise provided by law.

X. Termination:

Consultant and LITACorp agree that this Agreement may be terminated by either party upon thirty (30) days written notice to the other party. The parties also recognize that the contract may also be terminated for convenience as the State of Louisiana has the authority to terminate its agreement with LITACorp at any time by giving ninety (90) days written notice to LITACorp. If any such termination occurs, Consultant shall be notified by LITACorp in writing and Consultant shall, unless the notice documents state otherwise, immediately discontinue the work in connection with the performance of this Agreement. Consultant shall be entitled to payment for services rendered at the time of termination.

XI. Maintenance of records:

Consultant shall maintain all books and records pertaining to this Agreement for a period of three (3) years after the receipt of final payment under this Agreement.

XII. Fiscal Funding Clause:

The continuation of this agreement is contingent upon the appropriation of funds to fulfill the requirements of the agreement by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of the agreement, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the agreement, the agreement shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

XIII. Anti-Discrimination Clause:

Consultant agrees to abide by the requirements of the following as applicable: Title VI and VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Act of 1975, and Consultant agrees to abide by the requirements of the Americans with Disabilities Act of 1990. LITACorp agrees not to discriminate in its employment practices, and will render services under this contract without regard to race, color, religion, sex, sexual orientation, age, national origin, disability, political affiliation, veteran status, or any other non-merit factor. Any act of discrimination committed by Consultant, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this agreement.

XIV. Cybersecurity Training:

In accordance with La. R.S. 42:1267(B)(3) and the State of Louisiana's Information Security Policy, if Contractor, any of its employees, agents, or subcontractors will have access to State government information technology assets, Contractor's employees, agents,

or subcontractors with such access must complete cybersecurity training annually, and Contractor must present evidence of such compliance annually off State Civil Service without additional cost.

For purposes of this Section, “access to State government information technology assets” means the possession of credentials, equipment, or authorization to access the internal workings of State information technology systems or networks. Examples would include but not be limited to State-issued laptops, VPN credentials to credentials to access the State network, badging to access the State’s telecommunications closets or systems, or permissions to maintain or modify IT systems used by the State. Final determination of scope inclusions or exclusions relative to access to State government information technology assets will be made by the Office of Technology Services.

XV. Confidential Information:

Consultant agrees to that any information received by the Consultant during work in accordance with this contract that concerns the personal, financial, or other affairs of the LITACorp will be treated by the Consultant in full confidence and will not be revealed to any other persons, firms or organizations.

XVI. Address of Notices and Communications:

Leslie Durham, Executive Director LITA Corp 707 North 7 th Street Baton Rouge, Louisiana 70802	Perry J. Franklin Franklin Associates 250 S. Foster Drive Baton Rouge, LA 70806 CONSULTANT
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XVII. Captions:

Each paragraph of this Agreement has been supplied with a caption to serve only as a guide to the contents. The caption does not control the meaning of any paragraph on in any way determine its interpretation or application.

ATTEST:

Faye Dandridge
Faye Dandridge
(Printed Name of Witness)

KJ

Kyla Jones
(Printed Name of Witness)

LITA Corp

BY: Leslie Durham
Leslie Durham, Executive Director

DATE: June 1, 2023

Perry J. Franklin
CONSULTANT

BY: Perry J. Franklin
President

DATE: 6/1/23



**TECHNICAL ASSISTANCE PROGRAM:
CONSULTANT CONTRACT
HUNT, GUILLOT & ASSOCIATES**

AGREEMENT FOR CONSULTANT SERVICES

STATE OF LOUISIANA

PARISH OF East Baton Rouge

THIS IS AN AGREEMENT made as of 1st day of June, in the year 2023 by and between the LOUISIANA INFRASTRUCTURE TECHNICAL ASSISTANCE CORPORATION, a Louisiana non-profit corporation domiciled at 707 North 7th Street, Baton Rouge, Louisiana 70802, (hereinafter called LITACorp), represented by Leslie Durham, its Executive Director, and Hunt, Guillot & Associates, LLC, domiciled at 9357 Interline Avenue, Baton Rouge, LA 70809, (hereinafter called CONSULTANT).

WHEREAS, the United States Congress has enacted Public Law 117-58, known as the Infrastructure Investment and Jobs Act (IIJA), which, among other things, provides funding for State and local governments to invest in needed infrastructure improvements, construction, maintenance, etc.; and

WHEREAS, in Act 497 of the 2022 Regular Session, the Louisiana State Legislature created the Political Subdivision Federal Grant Assistance Fund (La. R.S. 39”100.201) for the administration of a program “to assist political subdivisions with competitive federal grant opportunities made pursuant to the Infrastructure Investment and Jobs Act.” As a result of this legislature, a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) established LITACorp to administer these funds on behalf of the Division of Administration; and

WHEREAS, LITACorp is a non-profit organization that was created to administer (1) a *Technical Assistance Program* to assist Louisiana’s municipal and parish governments with identifying and applying for grants through the IIJA; and (2) a *Matching Funds Grant Program* to equip local governments with matching funds that can be used to meet the local cost share requirements of federal grant programs funded through IIJA; and

WHEREAS, LITACorp desires to engage the CONSULTANT to render certain professional Project Management services in connection with the assisting municipal and parish governments with competitive federal grant opportunities and effectively administering grant funds.

NOW, THEREFORE, the parties do mutually agree as follows:

I. Employment of Consultant:

LITACorp hereby agrees to engage the CONSULTANT and the CONSULTANT hereby agrees to perform the Project Management Scope of Services set forth under the terms and conditions of this agreement.

- g. Synthesize data/information and transform it into compelling narratives, exhibits, attachments, and other supplemental materials appropriate to the specific grant programs to demonstrate eligibility, need, and competitiveness of the grant applications.
- h. Develop or provide technically-sound conceptually project cost estimates, if not readily available, to outline base cost of applicant projects.
- i. Conduct public outreach, if applicable, such as public and stakeholder meetings to fulfill grant programs' community engagement requirements and to build awareness of and support for applicant projects.
- j. Draft and obtain letters of support from federal, state, and local elected officials in a timely fashion to submit with grant applications.
- k. Develop project budgets and justifications in accordance with grant solicitation requirements and in alignment with local and state policies and regulations.
- l. Conduct detailed benefit cost analyses as required by various grant programs.
- m. Gather required environmental data, permits, and approvals.
- n. Edit draft proposals for consistency of messaging, ensuring integration of grant requirements and completeness prior to applicant final review and submittal to grantmaking agency.
- o. Ensure each grant package is prepared and submitted in a timely fashion, with all elements adhering to grant requirements and evaluation criteria.
- p. Conduct a quality assurance/quality control process to ensure accuracy and completeness of applications.
- q. Ensure applicants have access to grant submittal portals and, as needed, upload information into agency grant portals for applicants' convenience.
- r. Collect and organize all materials prepared for any grant application and submit final versions to applicant and LITACorp as part of a close-out process.
- s. Assist with the coordination of regional and statewide projects to maximize impact and increase the competitiveness of submitted grant applications.

3. Manage Successful IIJA Grant Applications

- a. Manage grantee compliance in accordance with federal, state, and local policies and procedures.
- b. Create and maintain project files that demonstrate compliance with all applicable federal, state, and local regulations.
- c. Coordinate and manage the creation and submittal of all reports required of grant recipients by the awarding agency and/or federal and state law.
- d. Streamline reporting processes to ensure continuous compliance with federal regulations governing grant administration requirements, communicate reimbursement requests and reporting requirements to communities, and implement grants management and monitoring processes to collect information necessary for fund requests and post-award reporting.
- e. Establish internal financial tracking systems, if not yet established, to ensure funds are expended for the specified purposes and within established timelines.
- f. Coordinate with applicants and relevant stakeholders to obtain all necessary costs estimates and other documentation to develop grant proposals and comply with required pos-award reporting.
- g. Track and monitor all project activities and cost expenditures, including indirect costs, to ensure grant funds are expended in accordance with federal guidance, policies, and regulations.
- h. Monitor and evaluate the progress of projects post-award in accordance with the approved scope of work and budget outlined in grant applications.
- i. Complete close-out reporting requirements for all communities to demonstrate the scope of grant-funded work was fully implemented, all obligated funds were expended appropriately, and grant conditions were implemented and documented as required.

4. Project Management

- a. Comprehensive management and coordination of the Technical Assistance Program, including all grant applications, projects, and consultant staff.
- b. Provide LITACorp with detailed weekly updates regarding community outreach and engagement activities, project pipeline, IJA grant programs, regional collaboration opportunities, grant development/submission, ongoing challenges, and other related activities.

- c. Prepare formal responses to address LITACorp, applicant, and constituent questions/inquiries and requests for information.
- d. Attend relevant community meetings, workshops, events and hearings (as necessary).
- e. Assist LITACorp with identifying, strategizing, and prioritizing funding needs for community projects, including matching funds.
- f. Meet regularly with LITACorp and applicants to discuss potential grant application and project management matters, such as appropriate grant programs, project scope of work, and most competitive strategies to deploy to be awarded IJA grant funds.

5. Professional Technical Support

- a. Provide, accommodate, or secure professional design and technical services, which all require prior approval of LITACorp to:
 - i. Ensure applicants have access to licensed engineers and architects who can create and submit the designs and specifications necessary to illustrate feasibility and cost estimates for grant applications; and
 - ii. Certify project plans and specifications, oversee procurement processes, and manage construction.

III. Times of Performance:

The services of the Consultant shall commence on the date of signing of this Agreement and all proper work order approved by LITACorp, an example of which is attached hereto as EXHIBIT A. Services shall be provided on a per hour basis as set forth in the Rate Sheet attached as EXHIBIT C. Such services shall be continued in such sequence as to assure their relevance to the purposes of this Agreement. All services shall be rendered in accordance with this Agreement and the Standard Operating Procedures for LITACorp Consultants, attached hereto as EXHIBIT B.

IV. Access to Information:

It is required that all information, data, reports, records as are existing, available and necessary for the carrying out of work outlined above shall be furnished to the Consultant by the LITACorp. No charge will be made to the Consultant for such information and the LITACorp will cooperate with the Consultant in every way possible to facilitate the performance of the work described in this Agreement.

V. Compensation and Method of Payment:

Consultant will be paid per hour for work performed using their established rate sheets in accordance with this agreement. Consultant will submit an itemized invoice setting forth the time spent and services rendered, and the company will pay Consultant the amounts due as indicated by invoice submitted by Consultant within thirty (30) days of receipt. All compensation for services shall be rendered and paid in accordance with this Agreement and the Standard Operating Procedures for LITACorp Consultants, attached hereto as EXHIBIT B.

VI. Independent Contractor:

Both LITACorp and Consultant agree that Consultant will act as an independent contractor in the performance of its duties under this contract. Accordingly, Consultant shall be responsible for payment of all taxes including Federal, State, and local taxes arising out of the consultant's activities in accordance with this contract, including by way of illustration but not limitation, Federal and State income tax, Social Security tax, Unemployment Insurance taxes, and any other taxes or business license fee as required.

VII. Ownership of Documents:

All documents and data are the property of LITACorp. Consultant may retain reproducible copies of documents and data.

VIII. Professional Liability:

Consultant shall be responsible for the use of reasonable skills and care benefiting the profession in the preparation of materials for the project covered by this Agreement.

IX. Indemnification:

Consultant shall comply with the requirements of all applicable laws, rules and regulations in connection with the services of Consultant, and shall exonerate, indemnify, and hold harmless LITACorp, its officers, agents and all employees from and against them and local taxes or contributions imposed or required under the Social Security, Workers' Compensation and Income Tax laws. Further, Consultant shall exonerate, indemnify and hold harmless LITACorp with respect to any damages, expenses or claims arising from or in connection with any of the work performed or to be performed under this Agreement by Consultant. This shall not be constructed as a limitation of the Consultant's liability under this Agreement or as otherwise provided by law.

X. Termination:

Consultant and LITACorp agree that this Agreement may be terminated by either party upon thirty (30) days written notice to the other party. The parties also recognize that the contract may also be terminated for convenience as the State of Louisiana has the authority

to terminate its agreement with LITACorp at any time by giving ninety (90) days written notice to LITACorp. If any such termination occurs, Consultant shall be notified by LITACorp in writing and Consultant shall, unless the notice documents state otherwise, immediately discontinue the work in connection with the performance of this Agreement. Consultant shall be entitled to payment for services rendered at the time of termination.

XI. Maintenance of records:

Consultant shall maintain all books and records pertaining to this Agreement for a period of three (3) years after the receipt of final payment under this Agreement.

XII. Fiscal Funding Clause:

The continuation of this agreement is contingent upon the appropriation of funds to fulfill the requirements of the agreement by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of the agreement, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the agreement, the agreement shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

XIII. Anti-Discrimination Clause:

Consultant agrees to abide by the requirements of the following as applicable: Title VI and VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Act of 1975, and Consultant agrees to abide by the requirements of the Americans with Disabilities Act of 1990. LITACorp agrees not to discriminate in its employment practices, and will render services under this contract without regard to race, color, religion, sex, sexual orientation, age, national origin, disability, political affiliation, veteran status, or any other non-merit factor. Any act of discrimination committed by Consultant, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this agreement.

XIV. Cybersecurity Training:

In accordance with La. R.S. 42:1267(B)(3) and the State of Louisiana's Information Security Policy, if Contractor, any of its employees, agents, or subcontractors will have access to State government information technology assets, Contractor's employees, agents, or subcontractors with such access must complete cybersecurity training annually, and Contractor must present evidence of such compliance annually off State Civil Service without additional cost.

For purposes of this Section, "access to State government information technology assets" means the possession of credentials, equipment, or authorization to access the internal

workings of State information technology systems or networks. Examples would include but not be limited to State-issued laptops, VPN credentials to access the State network, badging to access the State's telecommunications closets or systems, or permissions to maintain or modify IT systems used by the State. Final determination of scope inclusions or exclusions relative to access to State government information technology assets will be made by the Office of Technology Services.

XV. Confidential Information:

Consultant agrees to that any information received by the Consultant during work in accordance with this contract that concerns the personal, financial, or other affairs of the LITACorp will be treated by the Consultant in full confidence and will not be revealed to any other persons, firms or organizations.

XVI. Address of Notices and Communications:

Leslie Durham, Executive Director LITA Corp 707 North 7 th Street Baton Rouge, Louisiana 70802	Jack Hunt Hunt, Guillot & Associates, LLC 9357 Interline Avenue Baton Rouge, LA 70809 CONSULTANT
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XVII. Captions:

Each paragraph of this Agreement has been supplied with a caption to serve only as a guide to the contents. The caption does not control the meaning of any paragraph on in any way determine its interpretation or application.

ATTEST:

LITA Corp

Fisye Daudri.dg e
(Printed Name of Witness)

BY: *Leslie Durham*
Leslie Durham, Executive Director

DATE: June 1, 2023

Matthew Brickey
Matthew Brickey
(Printed Name of Witness)

Jack Hunt
CONSULTANT

BY: Jack Hunt
Principal

DATE: 6/1/2023



TECHNICAL ASSISTANCE PROGRAM: GUIDELINES



LOUISIANA **INFRASTRUCTURE TECHNICAL ASSISTANCE** CORP.

707 NORTH 7TH STREET BATON ROUGE, LOUISIANA 70802

Louisiana Infrastructure Technical Assistance Corporation

Technical Assistance Program Guidelines

Submitted to:

The Joint Legislative Committee on the Budget

By:

The Louisiana Infrastructure Technical Assistance Corporation

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I. **About the Louisiana Infrastructure Technical Assistance Corporation**

Established by ACT No. 497 in the 2022 Regular Session, the Louisiana State Legislature authorized the Political Subdivision Federal Grant Assistance Fund (§100.201) “to assist political subdivisions with competitive federal grant opportunities made pursuant to the Infrastructure Investment and Jobs Act ([P.L. 117-58](#))”.

As a result, the Louisiana Infrastructure Technical Assistance Corporation (LITACorp), a nonprofit organization, was established in October 2022 as a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) to advance three key goals:

1. Equip political subdivisions located in rural and economically distressed areas with the tools and resources they need to identify, apply for, and administer federal grants funded through the Infrastructure Investment and Jobs Act (IIJA).
2. Minimize barriers for political subdivisions to access federal resources by assisting them with meeting local cost share requirements of federal grant programs funded through IIJA.
3. Acquire federal grant funds through IIJA to construct, improve, or repair public infrastructure – water and sewer systems, roads, bridges, railways, ports, broadband, etc. – in rural and economically distressed communities throughout Louisiana.

II. **Program Description**

a. **Overview**

The Technical Assistance Program (TAP) provides services to local governments throughout Louisiana including, but not limited to, the following: strategic planning, project development, funding identification, grant writing, grant administration, and more. LITACorp has partnered with Franklin Associates and Hunt, Guillot and Associates (HGA) to provide technical assistance.

b. **Priorities**

LITACorp was designed to serve local governments with the greatest needs, so they could benefit from the influx of IIJA grant dollars that will be administered over the next five years.

LITACorp’s priorities revolve around serving local governments with limited **Capacity** and unstable **Fiscal** health, located in **Rural** and/or **Economically Distressed** areas.

III. **Eligibility Information**

a. **Eligible Entities**

Entities eligible to apply for a grant through the MFGP is limited to political subdivisions, including:

- Villages
- Towns

- Municipalities
- Parishes (i.e., police jury)

Nonprofit organizations and small businesses are not eligible to apply for assistance.

IV. Application Submission

a. How to Apply

Eligible applicants can visit LITACorp’s grant portal to submit a Letter of Interest (LOI) for LITACorp’s TAP: <https://www.grantinterface.com/Home/Logon>. All applicants will be prompted to create an account in LITACorp’s grant portal before applying.

LITACorp began accepting LOIs on June 22, 2022, and will accept LOIs on a rolling basis.

b. Application Content Requirements

The TAP LOI will require local governments to provide basic information about their communities, such as population, median household income, poverty rate, etc. Additionally, local governments will need to provide their more recent budget and information about the number of federal grants they have applied for and received over the past three years. This information will serve as the foundation from which applications will be evaluated.

In addition to the information above, local governments are encouraged to include information about one or more potential projects and the most needed technical assistance.

Content requirements may include, but not be limited to, the following:

- General Information
 - Applicant Overview
 - State Legislative Districts
 - Federal Congressional Districts
 - Population
 - Socioeconomic Status
- Fiscal Information
 - Annual Budget
 - Financial Audit
- Capacity Information
 - Grant Writer Access
 - Grants Applied For
 - Grants Received
- Technical Assistance Information
 - Type of Requested Technical Assistance
 - Proposed Infrastructure Project
- Authorization to Apply
 - Authorization Statement
 - Certification Statement

Ultimately, LITACorp’s TAP LOI will be simple to complete, but will still require the necessary information to make informed decisions about which local governments should

be prioritized for technical assistance (i.e., those local governments in more rural and economically distressed areas). This process will also allow LITACorp to discover partnership opportunities across jurisdictions to strengthen the IJA applications being submitted by Louisiana local governments.

c. Application Submission Instructions

TAP LOIs must be submitted electronically through [LITACorp's Grant Portal](#).

After a LOI is submitted, LITACorp will begin a validation process during which the application may be accepted, returned to the applicant due to errors or incomplete information, or rejected.

Be advised that it may take several days for the validation process to be completed.

V. Application Evaluation

a. Criteria

LITACorp has established criteria to evaluate applications submitted by municipalities and parishes, respectively, to help ensure technical assistance is directed towards those communities that need it most.

Municipalities will be evaluated as follows:

CRITERIA FOR MUNICIPALITIES		
Criterion	Description	Maximum Points
Distress	<p>The extent to which a municipality demonstrates economic distress, as defined by the following indicators:</p> <ul style="list-style-type: none"> • Persistent Poverty designation (10 points) • Justice40 Disadvantaged Community (10 points) • Median Household Income below the state average (5 points) • Poverty Rate above the state average (5 points) 	30
Rurality	<p>The extent to which a municipality demonstrates rurality as defined by the following population groups:</p> <ul style="list-style-type: none"> • 1-5,000 (30 points) • 5,001-15,000 (25 points) • 15,001-25,000 (20 points) • 25,001-35,000 (15 points) • 35,001-50,000 (10 points) • Greater than 50,000 (5 points) 	30
Fiscal	<p>The annual budget for the municipality:</p> <ul style="list-style-type: none"> • Less than \$10 million (20 points) • \$10,000,001-\$20,000,000 (15 points) • \$20,000,001-\$30,000,000 (10 points) 	20

	<ul style="list-style-type: none"> • \$30,000,001-\$45,000,000 (5 points) • Greater than \$45,000,000 (1 points) 	
Capacity	<p>The number of federal grants the municipality applied for in the past three (3) years (max. 15 points):</p> <ul style="list-style-type: none"> • None (15 points) • 1-3 (12 points) • 4-6 (8 points) • 7-9 (4 points) • 10 or more (2 points) <p>The number of federal grants the municipality was awarded in the past three (3) years (max. 5 points):</p> <ul style="list-style-type: none"> • None (5 points) • 1-3 (4 points) • 4-6 (3 points) • 7-9 (2 points) • 10 or more (1 point) 	20
TOTAL		100

Parishes will be evaluated as follows:

CRITERIA FOR PARISHES		
Criterion	Description	Maximum Points
Distress	<p>The extent to which a parish demonstrates economic distress, as defined by the following indicators:</p> <ul style="list-style-type: none"> • Persistent Poverty designation (10 points) • Justice40 Disadvantaged Community (10 points) • Median Household Income below the state average (5 points) • Poverty Rate above the state average (5 points) 	30
Rurality	<p>The extent to which a parish demonstrates rurality as defined by the following population groups:</p> <ul style="list-style-type: none"> • 1-15,000 (30 points) • 15,001-30,000 (25 points) • 30,001-45,000 (20 points) • 45,001-60,000 (15 points) • 60,001-75,000 (10 points) • Greater than 75,000 (5 points) 	30
Fiscal	The annual budget for the parish:	20

	<ul style="list-style-type: none"> • Less than \$25,000,000 (20 points) • \$25,000,001-\$40,000,000 (15 points) • \$40,000,001-\$55,000,000 (10 points) • \$55,000,001-\$65,000,000 (5 points) • Greater than \$65,000,000 (1 points) 	
Capacity	<p>The number of federal grants applied the parish for in the past three (3) years (max. 15 points):</p> <ul style="list-style-type: none"> • None (15 points) • 1-3 (12 points) • 4-6 (8 points) • 7-9 (4 points) • 10 or more (2 points) <p>The number of federal grants the parish was awarded in the past three (3) years (max. 5 points):</p> <ul style="list-style-type: none"> • None (5 points) • 1-3 (4 points) • 4-6 (3 points) • 7-9 (2 points) • 10 or more (1 point) 	20
TOTAL		100

b. Review and Selection Process

LITACorp will review and approve TAP LOIs on a rolling basis. LOIs will be prioritized based on how high they score against the evaluation criteria (*above*).

VI. Technical Assistance Administration

Upon selection for technical assistance, a memorandum of understanding (MOU) will specify the terms and specific conditions resulting from the pre-award risk assessments and the merit-based review process. The MOU must be accepted in the LITACorp Portal by an aLITACuthorized representative of the grantee organization.

Upon submission of the MOU, the applicant will be connected with LITACorp’s technical assistance provider. LITACorp’s TA provider will determine, in coordination with the applicant, the scope and duration of the TA activities.



Figure 1 LITACorp Technical Assistance Program Process Flowchart

VII. LITACorp Contact Information

All questions about the TAP should be directed to loi@litacorp.org. LITACorp will respond to all emails within 48 hours Monday through Friday.

VIII. General Disclosures

Technical assistance will be provided only to the extent that funds are available. Publication of TAP guidelines does not obligate LITACorp to provide technical assistance.

LITACorp will not reimburse for any other costs associated with the preparation of a response to the TAP.



**TECHNICAL ASSISTANCE PROGRAM:
GUIDEBOOK VERSION 2.0**



LITACorp Guide

Version 2.0 – September 13, 2023

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Version History

Version	Date	Revision Summary
1.0	8/22/23	First version
2.0	9/12/23	<ul style="list-style-type: none">• Added the Overview and Website sections• Added additional details regarding Task 1 and Task 2 process• Added list of IIJA grant opportunities available to localities• Added list of standing programs and IRA grant opportunities available to localities• Updated the font and overall font guidance for use in external LITACorp documents

LITACorp Overview

LITACorp is a non-profit organization that is a collaborative partnership between the LMA and Louisiana Policy Jury Association, with funding from the State of Louisiana, to build the capacity of Louisiana's parishes and municipalities to identify, apply for, and administer federal grants funded through the Infrastructure Investment and Jobs Act (IIJA). The Louisiana Infrastructure Technical Assistance Corporation (LITACorp), a nonprofit organization, was established in October 2022 as a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) to advance three key goals:

- Equip localities located in rural and economically distressed areas with the tools and resources they need to identify, apply for, and administer federal grants funded through the Infrastructure Investment and Jobs Act (IIJA).
- Minimize barriers for localities to access federal resources by assisting them with meeting local cost share requirements of federal grant programs funded through IIJA.
- Acquire federal grant funds through IIJA to construct, improve, or repair public infrastructure – water and sewer systems, roads, bridges, railways, ports, broadband, etc. – in rural and economically distressed communities throughout Louisiana.

LITACorp Website

The LITACorp website is located at: <https://www.litacorp.org/>.

Branding and Communication Protocols

Brand Guidelines and Templates

LITACorp brand guidelines can be found here: [23 LITAC-Logo-guidelines.pdf](#). For all LITACorp documents, please utilize the heading styles used in this document. To add Metropolis to your list of available fonts in Microsoft, download the fonts [here](#) and click install. You may need to restart Microsoft Word or PowerPoint for the font to populate.

Communications Protocols

LITACorp Teams/Sharepoint Site

LITACorp project sites can be found in the following locations: [Teams Link](#) and [SharePoint Link](#). SharePoint and Teams mirror each other and are simply different ways of accessing the same files. Project team members must always work in a live, online document to facilitate collaboration, rather than working in a downloaded copy of a file. Files hosted on the SharePoint and Teams are visible to the client and the entire project team. Confidential or sensitive information should be stored separately.

LITACorp Email Addresses

Every person working on the LITACorp project must use their LITACorp email address for all communications with federal, state and local officials.

Monitoring and Responding to LITACorp Mailboxes

Monitoring

E-mail messages created and transmitted via LITACorp mailboxes info@litacorp.org and LOI@litacorp.org are monitored by HGA during the business hours of 9:00 a.m. – 5:00 p.m., Monday through Friday. Franklin provides backup coverage when needed upon request.

Responding

Prompt replies are important in conveying a professional image and delivering good customer service. All e-mails should be acknowledged within 24 hours. The 24 hour 'rule' applies to acknowledging receipt of the e-mail and committing to the action, not to completing the required action.

E-mail responses that require consulting with the TA team should be sent within a reasonable (or set) timeframe. E-mails received over the weekend should be responded to Monday morning.

Incoming e-mails regarding technical issues that require the assistance of IT, should be sent to Aury Kangelos at aury@litacorp.org to be corrected. E-mails with technical issues should receive the following response or similar:

Hi [Salutation]

Thank you for bringing that to our attention. We are working to resolve the issue in a timely manner and will update you once resolved.

Sincerely,

[Team LITACorp Signature]

General

- All emails should be professional and respectful in tone.
- Should start with a salutation and end with a closing.
- Emails should be proofread, grammar and spell checked before sending to correct errors, check tone, and avoid miscommunication.
- Avoid using ALL CAPS in email communications.
- Emails should include the appropriate signatures (see "Email Signatures").

Completion

Once an email that requires action has been completed, move the email from the inbox to the appropriate subfolder.

Disclaimer

The following disclaimer is included in each outgoing email:

The information transmitted by this email and any attachments are confidential and intended solely for the use of the individual or entity to which they are addressed. This email may contain proprietary, business-confidential, and/or privileged material. If you are not the intended recipient of this message, any use, review, retransmission, distribution, reproduction, or any action taken in reliance upon this message is strictly prohibited. If you have received this email in error, please notify the sender.

Email Signatures

The following signature appear in all outbound emails as well as responses to emails for info@litacorp.org:



Team LITACorp
Louisiana Infrastructure Technical Assistance Corporation (LITACorp)
info@litacorp.org
(225) 230-2229
www.litacorp.org

The information transmitted by this email and any attachments are confidential and intended solely for the use of the individual or entity to which they are addressed. This email may contain proprietary, business-confidential, and/or privileged material. If you are not the intended recipient of this message, any use, review, retransmission, distribution, reproduction, or any action taken in reliance upon this message is strictly prohibited. If you have received this email in error, please notify the sender.

The following signature appear in all outbound emails as well as responses to emails for loi@litacorp.org:



Team LITACorp
Louisiana Infrastructure Technical Assistance Corporation (LITACorp)
loi@litacorp.org
(225) 230-2229
www.litacorp.org

The information transmitted by this email and any attachments are confidential and intended solely for the use of the individual or entity to which they are addressed. This email may contain proprietary, business-confidential, and/or privileged material. If you are not the intended recipient of this message, any use, review, retransmission, distribution, reproduction, or any action taken in reliance upon this message is strictly prohibited. If you have received this email in error, please notify the sender.

Individual LITACorp Emails

All correspondence to and from local governments comes from the LITACorp email address (typical format is: "[first initial last name](mailto:yourname@litacorp.org)"@litacorp.org). In all correspondence, identify yourself as a LITACorp TA Provider helping to identify IJA opportunities, assist with grant writing, assist with grant management and/or identify adjacent opportunities and resources.

Email Signature

Add the following signature to appear in all outbound e-mails as well as responses to e-mails.

For the phone number, use your office number and extension if you have one. The LITACorp phone number should **NOT** be used in the signature line.



First Name Last Name
Louisiana Infrastructure Technical Assistance Corporation (LITACorp)
yourname@litacorp.org
(XXX) XXX-XXXX
www.litacorp.org

The information transmitted by this email and any attachments are confidential and intended solely for the use of the individual or entity to which they are addressed. This email may contain proprietary, business-confidential, and/or privileged material. If you are not the intended recipient of this message, any use, review, retransmission, distribution, reproduction, or any action taken in reliance upon this message is strictly prohibited. If you have received this email in error, please notify the sender.

Task 1: Conduct Outreach to Louisiana Local Governments

Time interacting with prospective local governments prior to TA Work Order is billed to the Outreach Work Order including LOI completion, Discovery Sessions and development of Grant Guides for localities. Outreach also includes:

- One-on-one outreach to localities
- Call Center staff available for continuous outreach until the majority of LOIs are completed, as determined by LITACorp.
- Workshops held throughout the State

All outreach efforts should be limited to local governments including villages, towns, cities, parishes, and ports to the extent possible. Local agencies (e.g., town police departments) should not be targeted for general outreach efforts, as Technical Assistance would go to their local government (i.e., the town) and not a specific agency. LITACorp does not provide Technical Assistance to state agencies or nonprofits, and should therefore not conduct outreach with those entities.

The Outreach process begins with efforts to encourage and assist localities with LOI Completion. Following LOI completion, the assigned TA Provider will hold a discovery session with the local government to determine needs and capabilities, and to identify potential funding sources. After creating a grant strategy with the local government, the TA Provider will make a determination as to which funding sources LITACorp will provide TA to pursue. The TA Provider compiles a Grant Guide for each locality which includes one page overviews of relevant potential grant funding opportunities. The one page documents can be found in Once this is completed, the locality will sign an MOU acknowledging the conditions of receiving TA from LITACorp. Below are the major process steps that occur with localities during the Outreach phase.



LOI Development and Submission

One-on-One Outreach to Localities

TA Providers and Call Center agents (TA Team) generally follow the steps listed below when reaching out to localities regarding LITACorp:

- Reach out to local governments to tell them about LITACorp and advise them to complete and submit the LOI.
- Assist with completion of LOI if the locality requests/needs assistance.
- Submitting the LOI does not/is not:
 - Obligate them to use LITACorp exclusively for IJJA funding opportunities
 - An application for an actual IJJA-funded grant
 - Obligate them to apply for IJJA-funded grants

Call Center

- Call Center Agent staff are available to assist local governments complete the LOI.
- A Call Center Agent is available Monday-Friday, 9 AM – 5 PM with the goal of [helping complete the LOIs](#).
- Call Center Agent can take inbound calls and place outbound calls as needed.
- The phone number is 225-230-2229

A LITACorp Client is defined as any Parish, City, Town, Village, or other locality providing a Letter of Interest to LITACorp.

Workshops

LITACorp hosts a series of 16 Workshops throughout the state from August through October 2023. The purpose of these workshops is to raise awareness of LITACorp and what it can provide rural municipalities, and to help local governments take the first steps towards receiving technical assistance.

TA Providers create a list of all localities contacted at Workshops, along with their status and needs. The TA Provider assisting the locality will monitor Foundant for LOI completion; if the LOI is not completed within one week of the workshop, the TA Provider will contact the locality to offer assistance. If, based on discussion at the workshop, there is a need to assist with something other than LOI completion, the TA Provider will contact the locality within a week of the workshop.

LOI Submission and Assignment

- As LOIs are completed, Foundant generates an automated email that goes to each of the TA Providers.
- Assignments are made on a rotational basis (i.e., Franklin is assigned every other locality). Exceptions can be made on a case-by-case basis.
- The TA Provider assigned the LOI adds the new locality to the [LITACorp TA Status and Data Tracker.xlsx](#).
- The TA Provider assigned creates a folder for the locality where all information including meeting agendas, meeting notes, materials received from the locality and Grant Guides are posted. The folder is created at: Teams at LITACorp > General > 04. Local Municipality LOIs and Documentation (Task 2, 3, 5)

Discovery Session

Discovery Sessions are scheduled following assignment of a locality to a TA provider. Prior to the Discovery Session, the assigned TA Provider should review the locality's LOI and prepare for the session by reviewing any funding programs that may be of interest to the locality based on information provided in the LOI. When possible, the TA Provider should arrange to have a SME on hand to address relevant funding programs identified from the LOI. The TA provider should also review [LDH Water Grades](#) to help identify needs. No more than 2 TA Providers should be on each Discovery Sessions.

Below is an Email Template to send to locality to set up Discovery Session.

Subject: LOI Application – Next Step Discovery Call

Salutation + Name,

I'm following up with you on your recent LOI submission. The next step in the application process is to schedule a Discovery Call with one of our TA Providers. The main goal of this call is to gain a greater understanding of the project(s) you are seeking funding for so we can identify the best grant opportunities. The call takes approximately 30 – 60 minutes.

I'd like to get you scheduled as soon as possible, this week or next. Please let me know which days and time work best for you. After we set a date and time, you will receive a confirmation email with details for the call. Please don't hesitate to reach out with any questions you may have in the meantime.

I look forward to hearing back from you soon.

Sincerely,

- After receiving a response from the applicant, coordinate with the point of contact assigned to that locality to set the schedule.
- Create a Teams Meeting or Zoom to send out to the applicant. Put “Objectives of the Discovery Call” in the body of the invitation.
- Prepare the Agenda with all the relevant details and talking points.
- Send a courtesy reminder to the applicant before the scheduled meeting.

SCHEDULE DISCOVERY CALL TIMELINE: 2 weeks total (10) business days

- Send 1st email request. If there is no response within 2 days, send out a 2nd email request and call the number provided on the LOI.
- If there is no response within 1 day of the 2nd request, call the applicant again.
- If applicant is still unresponsive/unable to be reached after two (2) emails, two (2) phone calls, and ten (10) business days from assignment, report to LITACorp unable to reach applicant to schedule discovery. LITACorp may offer another way to reach that applicant.

During the Discovery Session, TA providers meet with leaders of the locality to discuss the following topics:

- **LITACorp**
The TA Provider should provide:
 - Background on the Program
 - Information on Eligible TA (i.e., IIJA-funded competitive grants)
 - Information on Matching Funds Program
 - Examples Available Funding Programs
- **Locality**

The TA Provider should gain an understanding of the locality's:

- Needs
- Priorities
- Capabilities
- Interest in specific grant opportunities
- Status of Grants.gov and SAM.gov registration
- **Specific Information on Relevant Funding Programs**

The TA Provider should provide information on applicant eligibility, types of projects eligible for funding, submission timelines, and match requirements for relevant funding programs. These could be funding sources identified ahead of time by reviewing the LOI or funding sources identified as relevant based on discussion.
- **LOI**

The TA Provider should use the Discovery Session to clarify any questions generated by the LOI.

Multiple Discovery Sessions may take place for the same locality to further advance the conversation.

After the Discovery Session(s), TA Provider develops a Grant Guide outlining appropriate grant funding opportunities. This may include non-IIJA funding opportunities if those are applicable. One-pagers to develop a Grant Guide specific to the locality can be found in the [IIJA Grant Information and Background Research](#) organized by federal agency with subfolders for each individual grant within the federal agency folder.

When sending the Grant Guide, the TA Provider notes which grant opportunities based on their priorities that LITACorp can assist with grant writing. Only one to two grant funded opportunities should be selected for each locality.

Once the locality indicates they are ready to proceed to grant writing assistance, the TA Provider follows the steps outlined in the next section.

Task 2: Pursue IIJA Funding

- If a "go" decision is made to pursue an IIJA funding opportunity(ies), a LITACorp creates a budget for providing the Technical Assistance and submits a Work Order in Foundant.
- LITACorp develops and execute an MOU between LITACorp and the locality
- Upon approval of TA Work Order, TA Provider begins work with the locality, its advisors, and other interested parties as directed by the locality
 - TA Team assigns SMEs by cross-cutting requirements.
 - Goal should be to submit grant application 48 hours prior to deadline if possible
 - Locality is responsible for the following:
 - Final editing
 - Actual submission

- If the goal of submitting 48 hours before the deadline is met, any technical or access issues should be resolved prior to the deadline.
- TA Providers are able to freely communicate with representatives of localities to assist them compile competitive grant applications.
- Draft grant applications should be noted as drafts in the title of the document.
- If possible and the locality can access it, the locality is given links to the grant application so they can work collaboratively in real time in the file.
- If a locality cannot access the Teams Links, draft or final grant applications may be sent to LITACorp Clients as e-mail attachments.
 - Upon receiving feedback and changes from LITACorp Clients, the relevant team member is responsible for merging the client's edits into the "live" document within Teams.
 - After successful integration, the previous version of the document should be moved to the designated "Z-Archive" folder within the Teams channel. This folder will serve as a repository for historical records, ensuring easy retrieval and reference of past versions.
- Access to government data systems SAM.gov and Grants.gov
 - LITACorp TA Providers should create accounts in Grants.gov using their litacorp.org e-mail addresses.
 - Determine who the AOR (Authorized Organization Representative) is in SAM.gov.
 - Should be one of the individuals listed in the "Contacts" section
 - SAM.gov records are not updated based on results of local elections
 - Only the AOR is permitted to create a "Workspace" in Grants.gov to upload documents to submit a grant application.
 - LITACorp TA Providers can offer to be invited to the Grants.gov Workspace by the applicant with their LITACorp e-mail addresses.
 - LITACorp TA Providers will be able to upload documents needed for the grant application.
 - Responsibility for submitting the application on Grants.gov should remain with the locality/AOR.

Task 3: Manage Successful IJA Applications

Below is the scope of work covered under this task. Once grant awards are made, this section will be fleshed out into policies and procedures for providing grant management services.

- Manage grantee compliance in accordance with federal, state, and local policies and procedures.
- Create and maintain project files that demonstrate compliance with all applicable federal, state, and local regulations.

- Coordinate and manage the creation and submittal of all reports required of grant recipients by the awarding agency and/or federal and state law.
- Streamline reporting processes to ensure continuous compliance with federal regulations governing grant administration requirements, communicate reimbursement requests and reporting requirements to communities, and implement grants management and monitoring processes to collect information necessary for fund requests and post-award reporting.
- Establish internal financial tracking systems, if not yet established, to ensure funds are expended for the specified purposes and within established timelines.
- Coordinate with applicants and relevant stakeholders to obtain all necessary cost estimates and other documentation to develop grant proposals and comply with required pos-award reporting.
- Track and monitor all project activities and cost expenditures, including indirect costs, to ensure grant funds are expended in accordance with federal guidance, policies, and regulations.
- Monitor and evaluate the progress of projects post-award in accordance with the approved scope of work and budget outlined in grant applications.
- Complete close-out reporting requirements for all communities to demonstrate the scope of grant-funded work was fully implemented, all obligated funds were expended appropriately, and grant conditions were implemented and documented as required.

Task 5: Professional Technical Support

HGA is responsible for providing all professional technical support. This includes providing, accommodating, and/or securing professional design and technical services, which all require prior approval of LITACorp to:

- Ensure applicants have access to licensed engineers and architects who can create and submit the designs and specifications necessary to illustrate feasibility and cost estimates for grant applications; and
- Certify project plans and specifications, oversee procurement processes, and manage construction.

Work Order Business Rules

Step 3: Initiate a New Work Order Within the Foundant Work Order system.

Step 4: Work Order Details: In the work order form, provide the necessary details for the TA assignment. These details may include:

- **Staff Information:** Select the staff member's name or ID from a drop-down menu or enter their information manually.
- **Project Name:** Specify "LITACorp" as the project name.
- **Task Description:** Clearly describe the specific task or technical assistance assignment the staff member will be responsible for within the LITACorp project.

- **Hours:** Indicate the number of hours the staff member is allocated to work on this task. Ensure this aligns with the project's overall timeline and budget constraints.
- **Timeline:** Set the start and end dates for the TA assignment to establish clear deadlines and ensure timely completion.

Step 5: Review and Submit: Before finalizing the work order, double-check all the details entered for accuracy and completeness. Ensure that the staff member's information, task description, hours, and timeline are all correct.

Step 6: Confirmation and Notification: Once the work order is submitted successfully, the Foundant system should generate a confirmation notification. This notification should be sent to the relevant parties, including the staff member, their supervisor, and the project manager or administrator overseeing the LITACorp project.

Logging Communications with Localities

ALL communications prior to assignment of Discovery Session with localities are logged in the [LITACorp Outreach Data.xlsm](#) and select the worksheet "Communication Log TA Team-Grid."

- Add a row and enter the information as necessary
- Column C "Municipality," is data-validated; use the drop-down menu
- Enter communication method
- Enter the task/Action Item
- Input the first name and last initial of the individual who performed the task.
- Enter summary, but meaningful notes.

Once an LOI is sent to LITACorp TA Providers, a Discovery Session is scheduled by Franklin or HGA and all updates and communications with the locality are captured in the [LITACorp TA Status and Data Tracker](#).

NOTE: We are working on migrating all interactions with localities and the workflow for moving localities through the outreach and TA process to ClickUp.

IJA Competitive Application Funding Guide

Below is a list of IJA funded grant opportunities by Federal Agency that LITACorp can potentially assist localities to write and submit grant applications once there is an executed TA Work Order. This list will be updated and refined with subsequent versions of this guide. There is also additional opportunities outlined in: [IJA Funding Sources.xlsx](#).

Additional details regarding these programs including one-pagers on each funding source that can be shared with localities can be found in the [IJA Grant Information and Background Research](#) organized by federal agency with subfolders for each individual grant within the federal agency folder.

Department of Energy (DOE)

[Energy Efficiency Revolving Loan Fund Capitalization Grant Program](#)

[Energy Improvement in Rural or Remote Areas](#)

[Grid Innovation Program](#)

[Weatherization Assistance Program Enhancement and Innovation Program](#)

[Smart Grid Grants](#)

Department of Transportation (DOT)

[Bridge Investment Program](#)

[Charging Fueling Infrastructure Grant Program](#)

[Grants for Bus and Bus Facilities Competitive Grant Programs](#)

[Low or No Emission Vehicle Program](#)

[Port Infrastructure Development Program](#)

[National Infrastructure Project Grant \(MEGA\)](#)

- Not likely applicable to the localities we are working with but noted for situational awareness

[Nationally Significant Multimodal Freight and Highway Grants \(INFRA\)](#)

- Requires regional coordination

[Natural Gas Distribution Infrastructure Safety and Modernization Grant](#)

[Promoting Resilient Operations for Transformative, Resilient & Cost Saving Transportation \(PROTECT\)](#)

[Railroad Crossing Elimination Grant](#)

[RAISE Grant Program](#)

[Reconnecting Communities and Neighborhoods Program](#)

[Rural and Tribal Assistance Pilot Program](#)

For the current NOFO, the maximum number of applications an applicant can submit is 3. The caveat is that the applicant is limited to the maximum amount awarded to a state at 20% of the allotted fiscal year funding: \$320,000 for FY22 and \$360,000 for FY23. So, if an applicant were to receive multiple awards, the total of those awards would be \$320,000 if awarded from FY22, for example. For the next round of funding, it hasn't yet been decided what the maximum award amount will be, but the awards to any one state will still be limited by the 20% cap on the fiscal year's funding, which for FY24 is \$2 million.

[Rural Surface Transportation Grant \(RURAL\)](#)

[Safe Streets and Roads for All \(SS4A\) Grant Program](#)

[Strengthening Mobility and Revolutionizing Transportation \(SMART\) Grants](#)

[Wildlife Crossings Program](#)

National Oceanic and Atmospheric Administration

[Coastal Habitat Restoration and Resilience Grants for Tribes and Underserved Communities](#)

- Due December 19, 2023

[Transformational Habitat Restoration and Coastal Resilience Grants](#)

Additional Funding Opportunities

Below is a list of additional funding opportunities that are available to localities and may be offered as additional potential grants to localities. However, LITACorp cannot assist with writing grants for these programs because they are not IIJA funded and/or funding is not distributed competitively via grant applications. This is

not an exhaustive list and updates to this list will be made as additional grants are rolled out.

Standing Programs

Department of Energy

[Energy Efficiency Community Block Grant](#)

[Weatherization Assistance Program](#) (supplemental appropriation was provided via IJA)

Department of Transportation

[Thriving Communities Program](#)

Inflation Reduction Act (IRA)

Department of Energy

[Home Energy Rebate Programs](#)

[Section 40101 \(D\) Formula Grants to States and Indian Tribes](#)

[Technical Assistance for the Adoption of Building Energy Codes](#)

[Transmission Siting and Economic Development Grants Program](#)

Underserved and Indigenous Community Microgrids

Environmental Protection Agency

[Drinking Water System Infrastructure Resilience and Sustainability](#)

[Solar for All](#)

USDA – Rural Development

[Empowering Rural America \(ERA\) Program](#)

[Powering Affordable Clean Energy \(PACE\) Program](#)

[Rural Energy for America Program \(REAP\)](#)

Federal Emergency Management Agency

IJA provided additional funding to [BRIC, FMA and STORM ACT](#) and created a Cybersecurity program.

Building Resilient Infrastructure and Communities (BRIC)

BRIC is funded annually and awarded competitively. Applications for BRIC are submitted to GOHSEP. FEMA opens the grant application period in the fall and it typically closes in January. BRIC can be used to fund:

- Capability- and Capacity-Building (C&CB) activities: Building code activities, partnerships, project scoping, and mitigation planning
- Hazard mitigation projects (Construction): Flood projection, stormwater improvements, stream restoration, microgrids, electrical hardening, seismic and wind retrofits, wildfire mitigation

BRIC reduces the non-federal cost share from 25% to 10% for Economically Disadvantaged Rural Communities (EDRC) (defined in 42 U.S.C. § 5133(a) as small impoverished communities).

Flood Mitigation Assistance (FMA)

FMA is a competitive program that provides funding to states, local communities, federally recognized tribes and territories. Funds can be used for projects that reduce or eliminate the risk of repetitive flood damage to buildings insured by the National Flood Insurance Program.

Cyber Security Grant Program

The State and Local Cybersecurity Grant Program (SLCGP) provides funding to eligible state, local, and territorial (SLT) governments to manage and reduce systemic cyber risk, thus improving the security of critical infrastructure and improving the resilience of the services SLT governments provide their community. The program is administered by the State. If localities have questions about this program, they can email: LCAP@la.gov.



**TECHNICAL ASSISTANCE PROGRAM:
LETTER OF INTEREST QUESTIONS**



Technical Assistance Program Letter of Interest Questions

GENERAL INFORMATION

Which entity do you represent?

- Village
- Town
- Municipality
- Police Jury

Which parish is your community located in?

Which State Legislator(s) represent your community in the Louisiana House of Representatives? Select all that apply. If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

Which State Legislator(s) represent your community in the Louisiana Senate? Select all that apply. If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

Which congressional district is your community located in? If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

- LA-01 (Rep. Steve Scalise)
- LA-02 (Rep. Troy Carter)
- LA-03 (Rep. Clay Higgins)
- LA-04 (Rep. Mike Johnson)
- LA-05 (Rep. Julia Letlow)
- LA-06 (Rep. Garret Graves)

POPULATION INFORMATION

What is your community's population?

If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana population 2020” in your search engine (ex. Google) to easily find your population for the last decennial census.

DISTRESS INFORMATION

Is your community located in a designated persistent poverty parish (aka persistent poverty county)? Select your parish from the list below. If your parish is not included in this list, select “My community is not located in a persistent poverty parish”.

Note: A persistent poverty county is a classification for counties in the United States that have had a relatively high rate of poverty over a long period. A 2009 U.S. federal law defined a persistent poverty county as one in which *“20 percent or more of its population [has lived] in poverty over the past 30 years”* as measured by the 1990, 2000 and 2010 decennial censuses.

Is your community designated a Justice40 Disadvantaged Community? If you are unsure, please use the Climate and Economic Justice Screening Tool (<https://screeningtool.geoplatform.gov/en/#3/33.47/-97.5>) to see if your community qualifies.

- Yes
- No
- I’m not sure

What is your community’s Median Household Income (MHI)? If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana median household income 2020” in your search engine (ex. Google) to easily find your MHI for the last decennial census.

What is your community’s poverty rate? If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana poverty rate 2020” in your search engine (ex. Google) to easily find your poverty rate for the last decennial census.

GEOGRAPHIC INFORMATION

Which population group does your municipality belong to?

- 1-5,000
- 5,001-15,000
- 15,001-25,000
- 25,001-35,000
- 35,001-50,000
- Greater than 50,000

Which population group does your parish belong to?

- 1-15,000
- 15,001-30,000
- 30,001-45,000
- 45,001-60,000
- 60,001-75,000
- Greater than 75,000

FISCAL INFORMATION

What is the annual budget for your municipality/parish government?

To confirm, the annual budget above represents my:

- Municipal government (including villages and towns)
- Parish government

Upload your municipality/parish government's most recent annual budget as approved by the governing board (ex. Board of Aldermen/Police Jury).

In the text box below, indicate which year the uploaded annual budget represents.

Is your municipality/parish government in good standing with the State of Louisiana?

- Yes
- No
- I'm not sure

Which year did your municipality/parish government complete its most recent financial audit?

- 2022
- 2021
- 2020
- 2019
- 2018

- I'm not sure
- My municipality/parish government has not completed a financial audit in the past five (5) years

Upload your municipality/parish government's most recently completed financial audit.

In the text box below, indicate which year the uploaded financial audit represents.

Were there any noteworthy findings in your most recent financial audit? If so, please explain.

CAPACITY INFORMATION

Does your community have a grant writer on staff or on contract?

- My community has a grant writer on staff.
- My community has a grant writer on contract.
- My community has a grant writer on staff and a grant writer on contract.
- My community has access to a grant writer, but they are not on staff nor on contract.
- My community does not have access to a grant writer.
- This question does not apply to me.

How many federal grants has your municipality/parish government applied for in the past in the past three years?

List the agency and grant programs your municipality/parish government applied for:

Example (if you selected two in the previous question):

1. U.S. Department of Agriculture - Rural Development, Rural Business Development Grant, \$78,000
2. Delta Regional Authority, States' Economic Development Assistance Program, \$425,000

How many federal grants has your municipality/parish government been awarded in the past in the past three years?

List the agency, grant programs, and grant amounts your municipality/parish government was awarded:

Example (if you selected two in the previous question)

1. U.S. Department of Agriculture - Rural Development, Rural Business Development Grant, \$78,000

2. Delta Regional Authority, States' Economic Development Assistance Program, \$425,000

TECHNICAL ASSISTANCE INFORMATION

What type of technical assistance are you interested in receiving? Select all that apply.

- Identifying grant opportunities
- Determining eligible activities
- Grant writing
- Grant administration
- Technical services (ex. engineering)
- Strategic planning
- Matching funds
- Other: _____

Briefly describe the type of technical assistance you want to receive through LITACorp.

Provide a list of your community's priority infrastructure projects.

Include information such as:

- Type of project
- Brief scope of work
- Estimated cost

How did you learn about the Louisiana Infrastructure Technical Assistance Corporation (LITACorp)?

- Online search
- Social media
- Print media (ex. Newspaper or magazine)
- Television
- Radio
- Word of mouth
- Other: _____

What is your primary source of information?

- Internet
- Social media
- Print media (ex. Newspaper or magazine)
- Television
- Radio
- Word of mouth

- Other: _____

AUTHORIZATION

I confirm that I am authorized to apply for technical assistance on behalf of my municipality/parish government.



MATCHING FUNDS GRANT PROGRAM: GUIDELINES



LOUISIANA **INFRASTRUCTURE TECHNICAL ASSISTANCE** CORP.

707 NORTH 7TH STREET BATON ROUGE, LOUISIANA 70802

Louisiana Infrastructure Technical Assistance Corporation

Matching Funds Grant Program Guidelines

Submitted to:

The Joint Legislative Committee on the Budget

By:

The Louisiana Infrastructure Technical Assistance Corporation

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I. **About the Louisiana Infrastructure Technical Assistance Corporation**

Established by ACT No. 497 in the 2022 Regular Session, the Louisiana State Legislature authorized the Political Subdivision Federal Grant Assistance Fund (§100.201) “to assist political subdivisions with competitive federal grant opportunities made pursuant to the Infrastructure Investment and Jobs Act ([P.L. 117-58](#))”.

As a result, the Louisiana Infrastructure Technical Assistance Corporation (LITACorp), a nonprofit organization, was established in October 2022 as a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) to advance three key goals:

1. Equip political subdivisions located in rural and economically distressed areas with the tools and resources they need to identify, apply for, and administer federal grants funded through the Infrastructure Investment and Jobs Act (IIJA).
2. Minimize barriers for political subdivisions to access federal resources by assisting them with meeting local cost share requirements of federal grant programs funded through IIJA.
3. Acquire federal grant funds through IIJA to construct, improve, or repair public infrastructure – water and sewer systems, roads, bridges, railways, ports, broadband, etc. – in rural and economically distressed communities throughout Louisiana.

II. **Program Description**

a. **Overview**

The Matching Funds Grant Program (MFGP) assists Louisiana local governments with meeting local cost share requirements established by grant programs funded through the Infrastructure Investment and Jobs Act (IIJA).

MFGP is complemented by LITACorp’s Technical Assistance Program (TAP), which provides no-cost services to local governments needing assistance with project development, grant writing and grant administration.

b. **Priorities**

LITACorp was designed to serve local governments with the greatest needs, so they could benefit from the influx of IIJA grant dollars that will be administered over the next five years. Therefore, LITACorp’s priorities are reflected not only in TAP, but also in the evaluation criteria for MFGP.

LITACorp’s priorities revolve around serving local governments with limited **Capacity** and unstable **Fiscal** health, located in **Rural** and/or **Economically Distressed** areas.

III. **Award Information**

a. **Funding Availability**

LITACorp is making available \$20 million to assist Louisiana communities with meeting the local cost share requirements established by most, if not all, federal grant programs through the IIJA.

In general, grant awards will range from \$50,000 to \$1 million, depending on the project scope and regional impact.

b. Period of Performance

The period of performance for grant awards made under this program will coincide with the IIJA grant program the funds are being used to match. For example, if a selected community applies for and receives a grant through the U.S. Economic Development Administration (EDA), LITACorp will disburse their MFGP funds proportionately as they draw down funds from the EDA grant award. In this case, EDA, generally, disburses funds over a 12 – 48-month period, depending on the type of project.

However, the maximum period of performance for a MFGP award is 48 months or four years.

IV. Eligibility Information

a. Eligible Entities

Entities eligible to apply for a grant through the MFGP is limited to political subdivisions, including:

- Villages
- Towns
- Municipalities
- Parishes (i.e., police jury)

Nonprofit organizations and small businesses are not eligible to apply for assistance.

b. Cost Sharing/Matching

The MFGP is intended to help local governments meet the local matching requirements for federal grants funded under IIJA. Once an MFGP application is submitted to and approved, LITACorp will issue a Letter of Commitment to validate that MFGP funds will be committed to the local government's project if, and only if, the local government receives a grant funded through an IIJA program.

Therefore, award of MFGP funds is contingent upon the local government receiving a federal grant under IIJA. If the local government is not successful in receiving an IIJA grant, then LITACorp will de-obligate the previously committed MFGP funds to make available for other projects. In this instance, the local government can apply for MFGP funds in the future once they identify another IIJA grant to apply for, that requires local match.

V. Application Submission

a. How to Apply

Eligible applicants can visit LITACorp's grant portal to apply for MFGP funds: <https://www.grantinterface.com/Home/Logon>. All applicants will be prompted to create an account in LITACorp's grant portal before applying.

Note: for local governments that submitted a Letter of Interest under LITACorp's Technical Assistance Program (TAP), their accounts are already in the LITACorp grant portal so they will be able to sign in and apply immediately for MFGP.

The MFGP application will be available on **September 5, 2023**, and will accept applications on a rolling basis.

b. Application Content Requirements

Like the Letter of Interest, the MFGP application will require local governments to provide basic information about their communities, such as population, median household income, poverty rate, etc. Additionally, local governments will need to provide their more recent budget and information about the number of federal grants they have applied for and received over the past three years. This information will serve as the foundation from which applications will be evaluated.

In addition to the information above, local governments will also be required to provide information about their project and which IIJA grant they intend to apply for.

Content requirements may include, but not be limited to, the following:

- Project Summary
 - Project Overview
 - State Legislative Districts
 - Federal Congressional Districts
- Project Description
 - Community Needs & Impact
 - Scope of Work
 - Anticipated Outcomes
- IIJA Grant Information
 - Grant Program Name
 - Funding Agency Name
 - Local Match Requirements
- Budget
 - Total Project Budget
 - Federal Request
 - Local Match Commitment (*other than LITACorp request*)
 - Budget Narrative
- Authorization to Apply
 - Resolution Authorizing Submission of IIJA Application (*must be approved by governing body*)

Ultimately, LITACorp's MFGP application will be simple to complete, but will still require the necessary information to make informed decisions about which local governments should be prioritized for funding (i.e., those local governments in more rural and economically distressed areas). This process will also allow LITACorp to discover partnership opportunities across jurisdictions to strengthen the IIJA applications being submitted by Louisiana local governments.

LITACorp’s TAP Team will be available at no-cost to local governments to provide assistance as they complete their MFGP application.

c. Application Submission Instructions

MFGP applications must be submitted electronically through [LITACorp’s Grant Portal](#).

Prior to submission of an application, potential applicants should consider submitting a Letter of Interest for LITACorp’s Technical Assistance Program (TAP). Through TAP, LITACorp provides no-cost services to local governments needing assistance with project development, grant writing and grant administration, and technical services (i.e., planning and design).

After an application is submitted, LITACorp will begin a validation process during which the application may be accepted, returned to the applicant due to errors or incomplete information, or rejected.

Be advised that it may take several days for the validation process to be completed.

VI. Application Evaluation

a. Criteria

LITACorp has established criteria to evaluate applications submitted by municipalities and parishes, respectively, to help ensure funds from the MFGP are directed towards those communities that need it most.

Municipalities will be evaluated as follows:

CRITERIA FOR MUNICIPALITIES		
Criterion	Description	Max Points
Distress	The extent to which a municipality demonstrates economic distress, as defined by the following indicators: <ul style="list-style-type: none"> • Persistent Poverty designation (15 points) • Justice40 Disadvantaged Community (10 points) • Median Household Income below the state average (5 points) • Poverty Rate above the state average (5 points) 	35
Rurality	The extent to which a municipality demonstrates rurality as defined by the following population groups: <ul style="list-style-type: none"> • 1-5,000 (25 points) • 5,001-15,000 (20 points) • 15,001-25,000 (15 points) • 25,001-35,000 (10 points) • 35,001-50,000 (5 points) • Greater than 50,000 (0 points) 	25
Fiscal	The annual budget for the municipality: <ul style="list-style-type: none"> • Less than \$10 million (20 points) • \$10,000,001-\$20,000,000 (15 points) • \$20,000,001-\$30,000,000 (12 points) • \$30,000,001-\$45,000,000 (10 points) 	20

	<ul style="list-style-type: none"> Greater than \$45,000,000 (5 points) 	
Capacity	<p>The number of federal grants the municipality applied for in the past three (3) years (max. 12 points):</p> <ul style="list-style-type: none"> None (12 points) 1-3 (8 points) 4-6 (6 points) 7-9 (4 points) 10 or more (2 points) <p>The number of federal grants the municipality was awarded in the past three (3) years (max. 8 points):</p> <ul style="list-style-type: none"> None (8 points) 1-3 (6 points) 4-6 (4 points) 7-9 (2 points) 10 or more (0 points) 	20
TOTAL		100

Parishes will be evaluated as follows:

CRITERIA FOR PARISHES		
Criterion	Description	Max Points
Distress	<p>The extent to which a parish demonstrates economic distress, as defined by the following indicators:</p> <ul style="list-style-type: none"> Persistent Poverty designation (15 points) Justice40 Disadvantaged Community (10 points) Median Household Income below the state average (5 points) Poverty Rate above the state average (5 points) 	35
Rurality	<p>The extent to which a parish demonstrates rurality as defined by the following population groups:</p> <ul style="list-style-type: none"> 1-15,000 (25 points) 15,001-30,000 (20 points) 30,001-45,000 (15 points) 45,001-60,000 (10 points) 60,001-75,000 (5 points) Greater than 75,000 (0 points) 	25
Fiscal	<p>The annual budget for the parish:</p> <ul style="list-style-type: none"> Less than \$25,000,000 (20 points) \$25,000,001-\$40,000,000 (15 points) \$40,000,001-\$55,000,000 (12 points) \$55,000,001-\$65,000,000 (10 points) Greater than \$65,000,000 (5 points) 	20
Capacity	<p>The number of federal grants applied the parish for in the past three (3) years (max. 12 points):</p> <ul style="list-style-type: none"> None (12 points) 1-3 (8 points) 4-6 (6 points) 7-9 (4 points) 	20

	<ul style="list-style-type: none"> • 10 or more (2 points) <p>The number of federal grants the parish was awarded in the past three (3) years (max. 8 points):</p> <ul style="list-style-type: none"> • None (8 points) • 1-3 (6 points) • 4-6 (4 points) • 7-9 (2 points) • 10 or more (0 points) 	
TOTAL		100

b. Review and Selection Process

LITACorp will review and approve MFGP applications on a rolling basis. Applications will be prioritized based on how high they score against the evaluation criteria (above).

VII. Award Administration

The Notice of Award (NOA) will specify the funding terms and specific conditions resulting from the pre-award risk assessments and the merit-based review process. The NOA must be accepted in the LITACorp Portal by an authorized representative of the grantee organization. The NOA is not an authorization to begin performance or incur costs.

MFGP funds will be disbursed in proportion to the IJJA grant received by a local government to ensure funds are being spent in accordance with LITACorp’s authorizing statute.

Local governments will submit requests to drawdown MFGP funds in the LITACorp grant portal. Requests can be submitted in the form of a reimbursement or an advance; however, LITACorp will require supporting documentation before releasing MFGP funds to local governments. Once the drawdown requests are approved, payment will be issued by LITACorp within 30 days.

***Note:** LITACorp’s TAP Team will be providing grant administration assistance on a case-by-case basis and can assist with the MFGP drawdown requests as needed.*

VIII. LITACorp Contact Information

All questions about the MFGP should be directed to grants@LITACorp.com. LITACorp will respond to all emails within 48 hours Monday through Friday.

IX. General Disclosures

The MFGP awards will be made only to the extent that funds are available. Publication of MFGP guidelines does not obligate LITACorp to award any specific grant or cooperative agreement or to obligate all or any part of available funds.

LITACorp will not reimburse for any other costs associated with the preparation of a response to the MFGP or any other pre-award costs.



**MATCHING FUNDS GRANT PROGRAM:
APPLICATION QUESTIONS**



Matching Funds Grant Program Application Questions

Note: *Some of the questions below (i.e., questions under General Information, Population Information, Geographic Information, Fiscal Information, Capacity Information and Miscellaneous Information) are asked of those local governments that apply to participate in LITACorp’s Technical Assistance Program (TAP). For those local governments that have already answered these questions in their TAP Letter of Interest, they will not need to re-submit this information and will only answer questions under the Project Information section. To better reflect what most local governments will complete in their application (if they participated in TAP and information was already collected), LITACorp shows the Project Information section first in this document for illustrative purposes.*

PROJECT INFORMATION

Project Summary

Provide a brief description of your project.

Project Description

Describe your community’s need for the project and anticipated impact on the community once implemented.

What is the specific scope of work of your project?

What are the anticipated outcomes of the project once implemented (e.g., jobs created or retained).

IIJA Grant Information

IIJA Grant Program Name: _____

Funding Agency Name: _____

Local Match Requirement

- No match required
- 10% match
- 20% match
- 50% match
- Other: _____

Budget

Total Project Request: \$ _____

Federal Request: \$ _____

Local Match Commitment (other than LITACorp request):
\$ _____

Provide a budget narrative below.

Personnel	\$ <i>Description</i>
Fringe Benefits	\$ <i>Description</i>
Travel	\$ <i>Description</i>
Equipment	\$ <i>Description</i>
Supplies	\$ <i>Description</i>
Contractual	\$ <i>Description</i>
Construction	\$ <i>Description</i>
Other	\$ <i>Description</i>
Total Direct Costs	\$ <i>Description</i>
Indirect Costs	\$ <i>Description</i>
Total Costs	\$

GENERAL INFORMATION

Which entity do you represent?

- Village
- Town
- Municipality
- Police Jury

Which parish is your community located in?

Which State Legislator(s) represent your community in the Louisiana House of Representatives? Select all that apply.

If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

Which State Legislator(s) represent your community in the Louisiana Senate? Select all that apply.

If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

Which congressional district is your community located in? If you are unsure, please use your address to search (<http://www.legis.la.gov/legis/FindMyLegislators.aspx>).

- LA-01 (Rep. Steve Scalise)
- LA-02 (Rep. Troy Carter)
- LA-03 (Rep. Clay Higgins)
- LA-04 (Rep. Mike Johnson)
- LA-05 (Rep. Julia Letlow)
- LA-06 (Rep. Garret Graves)

POPULATION INFORMATION

What is your community's population?

If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana population 2020” in your search engine (ex. Google) to easily find your population for the last decennial census.

DISTRESS INFORMATION

Is your community located in a designated persistent poverty parish (aka persistent poverty county)? Select your parish from the list below. If your parish is not included in this list, select “My community is not located in a persistent poverty parish”.

Note: A persistent poverty county is a classification for counties in the United States that have had a relatively high rate of poverty over a long period. A 2009 U.S. federal law defined a persistent poverty county as one in which “20 percent or more of its population [has lived] in poverty over the past 30 years” as measured by the 1990, 2000 and 2010 decennial censuses.

Is your community designated a Justice40 Disadvantaged Community?

If you are unsure, please use the Climate and Economic Justice Screening Tool (<https://screeningtool.geoplatform.gov/en/#3/33.47/-97.5>) to see if your community qualifies.

- Yes
- No
- I’m not sure

What is your community’s Median Household Income (MHI)?

If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana median household income 2020” in your search engine (ex. Google) to easily find your MHI for the last decennial census.

Is your community’s MHI below the state average of \$53,571?

- Yes
- No

What is your community’s poverty rate?

If you are unsure, please use the U.S. Census Bureau QuickFacts system to look up this information (<https://www.census.gov/quickfacts/fact/table/US/PST045222>). For cities and towns with a population of 4,999 or less, input “[City/Town], Louisiana poverty rate

2020” in your search engine (ex. Google) to easily find your poverty rate for the last decennial census.

Is your community’s poverty rate above the state average of 19.6%?

- Yes
- No

GEOGRAPHIC INFORMATION

Which population group does your municipality belong to?

- 1-5,000
- 5,001-15,000
- 15,001-25,000
- 25,001-35,000
- 35,001-50,000
- Greater than 50,000

Which population group does your parish belong to?

- 1-15,000
- 15,001-30,000
- 30,001-45,000
- 45,001-60,000
- 60,001-75,000
- Greater than 75,000

FISCAL INFORMATION

What is the annual budget for your municipality/parish government?

To confirm, the annual budget above represents my:

- Municipal government (including villages and towns)
- Parish government

Upload your municipality/parish government’s most recent annual budget as approved by the governing board (ex. Board of Aldermen/Police Jury).

In the text box below, indicate which year the uploaded annual budget represents.

Which year did your municipality/parish government complete its most recent financial audit?

- 2022
- 2021
- 2020
- 2019
- 2018
- I'm not sure
- My municipality/parish government has not completed a financial audit in the past five (5) years

Upload your municipality/parish government's most recently completed financial audit.

In the text box below, indicate which year the uploaded financial audit represents.

CAPACITY INFORMATION

How many federal grants has your municipality/parish government applied for in the past in the past three years?

- None
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 or more

List the agency and grant programs your municipality/parish government applied for:

How many federal grants has your municipality/parish government been awarded in the past in the past three years?

- None
- 1
- 2
- 3
- 4

- 5
- 6
- 7
- 8
- 9
- 10 or more

List the agency, grant programs, and grant amounts your municipality/parish government was awarded:

MISCELLANEOUS INFORMATION

How did you learn about the Louisiana Infrastructure Technical Assistance Corporation (LITACorp)?

- Online search
- Social media
- Print media (ex. Newspaper or magazine)
- Television
- Radio
- Word of mouth
- Other: _____

What is your primary source of information?

- Internet
- Social media
- Print media (ex. Newspaper or magazine)
- Television
- Radio
- Word of mouth
- Other: _____

AUTHORIZATION

- I confirm that I am authorized to apply for matching funds through LITACorp on behalf of my municipality/parish government.

Upload a resolution authorizing submission of IJA application (must be approved by governing body).



**MATCHING FUNDS GRANT PROGRAM:
LOCAL COST SHARE/MATCH SCENARIOS**



INTRODUCTION

Established by ACT No. 497 in the 2022 Regular Session, the Louisiana State Legislature authorized the Political Subdivision Federal Grant Assistance Fund (\$100.192) “to assist political subdivisions with competitive federal grant opportunities made pursuant to the Infrastructure Investment and Jobs Act (P.L. 117-58)”.

As a result, the Louisiana Infrastructure Technical Assistance Corporation (LITACorp), a nonprofit organization, was established in October 2022 as a collaborative partnership between the Louisiana Municipal Association (LMA) and the Police Jury Association of Louisiana (PJAL) to advance three key goals:

1. Equip political subdivisions located in rural and economically distressed areas with the tools and resources they need to identify, apply for, and administer federal grants funded through the Infrastructure Investment and Jobs Act (IIJA).
2. Minimize barriers for political subdivisions to access federal resources by assisting them with meeting local cost share requirements of federal grant programs funded through IIJA.
3. Acquire federal grant funds through IIJA to construct, improve, or repair public infrastructure – water and sewer systems, roads, bridges, railways, ports, broadband, etc. – in rural and economically distressed communities throughout Louisiana.

TECHNICAL ASSISTANCE PROGRAM (TAP) UPDATE

- LITACorp’s Technical Assistance Program (TAP) provides no-cost services to local governments needing assistance with project development, grant writing and grant administration, and technical services (i.e., planning and design).
- As of August 17, 2023, LITACorp has received letters of interest from 27 local governments and police juries across Louisiana requesting to participate in TAP.
- To date, LITACorp has held discovery calls with 13 of the 27 (others are scheduled or are being scheduled currently) and executed memorandums of understanding for technical assistance with four communities, including the Towns of Berwick, Richwood, and Baldwin and the City of Patterson.

MATCHING FUNDS GRANT PROGRAM (MFGP) UPDATE

- LITACorp’s Matching Funds Grant Program (MFGP) intends to make up to \$20 million available to Louisiana local governments seeking competitive, discretionary federal grants under the IIJA.
- To ensure funds are equitably distributed to as many communities across the state, LITACorp will provide grants up to \$1 million to assist Louisiana communities with meeting the local cost share requirements so often mandated by federal grant programs.
- In some instances, Louisiana communities will need more than \$1 million to commit as a local match. LITACorp’s Technical Assistance Team will assist these communities with securing other funds so they can implement their infrastructure project(s).

- With more significant funding made available in the future, LITACorp could help communities meet these larger local cost share requirements, without the delay of seeking out sources of funding, enabling Louisiana communities to be immediately responsive to federal grant programs.
- LITACorp's MFGP is intended to encourage more local governments to apply for federal IIJA grant opportunities, provide critical assistance to meet the minimum match eligibility requirements, increase the competitiveness of applications, and provide the State of Louisiana with an opportunity to realize a generational investment in its local infrastructure through IIJA discretionary grant programs that are well aligned with local and regional economic development goals and priorities.
- MFGP program guidelines and application have been developed. LITACorp plans to accept applications on a rolling basis beginning September 5, 2023.
- Once LITACorp evaluates an application, LITACorp will provide the local government with a Letter of Commitment to confirm their local cost share requirements will be met by LITACorp at a pre-approved amount in the event the community receives the IIJA grant they applied for.
- Once awarded, LITACorp will make funding disbursements to the local government throughout the life of the project to ensure funds are deployed efficiently and for their intended purpose.

LOCAL MATCH SCENARIOS FOR IIJA GRANT PROGRAMS

To illustrate some examples of the MFGP cost sharing, see below. Five examples are hypothetical based on information gathered from Technical Assistance Program Letters of Intent and discovery meetings, with the others consisting of communities which LITACorp was unable to provide matching fund support.

Other examples included below are real-life project scenarios located in communities that have not applied for technical assistance, but would likely consider applying for support through MFGP, or are completely hypothetical scenarios to represent the cost share requirements that could pose barriers for Louisiana governments seeking to apply for IIJA funding to address critical infrastructure needs.

Ultimately, these scenarios demonstrate immediate demand for LITACorp's MFGP and serves as evidence for the request to draw down the first half of the funds (\$10 million) from the Louisiana Legislature, as these funds were intended to support these local governments with cost share requirements.

This information is shown in the tables on the next four pages.

APPLICANT Town of Berwick

PROJECT SUMMARY The proposed project includes the replacement of an existing PVC natural gas main with 4" PE pipe and the replacement of existing service pipe with 2" PE coiled pipe. The project will also include the installation of 4" ball valves, necessary road bores, tracer wire pedestals, and associated tie-ins to existing gas mains. Approximately 510 customers will receive new service taps, excess flow valves, and new anodeless risers along with the replacement of 210 customers' aging meters.

IIJA GRANT OPPORTUNITY(IES) USDOT - Natural Gas Distribution Infrastructure and Safety Modernization Grant

DEADLINE August 4, 2023

LOCAL MATCH REQUIREMENTS N/A

POTENTIAL FUNDING REQUEST \$4,085,096

AMOUNT OF LOCAL MATCH NEEDED N/A

APPLICANT City of Patterson

PROJECT SUMMARY This project will replace approximately 3.06 miles of an aging gas steel pipe along state highway 182 with a 4-inch polyethylene pipe (PE). The new line will be installed using Horizontal directional drilling (HDD). The existing steel gas line will be abandoned to reduce the total cost of construction. The project's scope also includes replacing many old deteriorating service lines, installing control and relief valves, and purchase of leak detection devices.

IIJA GRANT OPPORTUNITY(IES) USDOT - Natural Gas Distribution Infrastructure and Safety Modernization Grant

DEADLINE August 4, 2023

LOCAL MATCH REQUIREMENTS N/A

POTENTIAL FUNDING REQUEST \$3,200,000

AMOUNT OF LOCAL MATCH NEEDED N/A

APPLICANT Iberia Parish¹

PROJECT SUMMARY Funding will be used to replace one box culvert and rehabilitate one pipe arch culvert along local and regionally significant roadways to improve flood control. Both culverts are on the national bridge inventory.

IIJA GRANT OPPORTUNITY(IES) USDOT - Bridge Investment Program

DEADLINE Fall 2023

LOCAL MATCH REQUIREMENTS 20%

POTENTIAL FUNDING REQUEST \$10,000,000

AMOUNT OF LOCAL MATCH NEEDED \$2,000,000

APPLICANT Town of Oberlin²

PROJECT SUMMARY Promoting state of good repair on the city's minor and major collector roadway network and expanding capacity on local principal arterial while incorporating separated bicycle and pedestrian facilities to improve multimodal safety for the adjacent historically disadvantaged community.

IIJA GRANT OPPORTUNITY(IES) USDOT - Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Grant Program

DEADLINE Projected February 2024

LOCAL MATCH REQUIREMENTS 20%

POTENTIAL FUNDING REQUEST \$1,000,000

AMOUNT OF LOCAL MATCH NEEDED \$200,000

APPLICANT City of West Monroe

PROJECT SUMMARY Funding will be used to realize the Street Corridor part of the West Monroe Revitalization Project. This federal funding will leverage earlier investments along with planned improvements to increase community connectivity, encourage non-motorized transportation, increase safety, and revitalize key infrastructure in this rural city. Specifically, the city is seeking RAISE funding for improvements to six components:

- 1) Highland Park
- 2) Trenton Street Corridor
- 3) Downtown
- 4) Stella/Mill Gateway
- 5) Natchitoches Street
- 6) Coleman Corridor

IIJA GRANT OPPORTUNITY(IES) USDOT - Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Grant Program

DEADLINE Fall 2023

LOCAL MATCH REQUIREMENTS 20%

POTENTIAL FUNDING REQUEST \$17,955,671

AMOUNT OF LOCAL MATCH NEEDED \$4,460,000

APPLICANT Village of Anacoco³

PROJECT SUMMARY Funding will be used to complete the planning, design, and construction of the north water plant tank.⁴

IIJA GRANT OPPORTUNITY(IES) FEMA - Building Resilient Infrastructure and Communities (BRIC)

DEADLINE Fall 2023

LOCAL MATCH REQUIREMENTS 25%

POTENTIAL FUNDING REQUEST \$480,000

AMOUNT OF LOCAL MATCH NEEDED \$120,000

APPLICANT **Tangipahoa Parish Government**⁵

PROJECT SUMMARY Funding will be used to design and construct a new off-ramp interchange at Firetower Rd off Interstate 12, including flood mitigation and drainage improvements and stormwater retention at 2 sites.

IIJA GRANT OPPORTUNITY(IES) Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation

DEADLINE Summer 2024

LOCAL MATCH REQUIREMENTS 20%

POTENTIAL FUNDING REQUEST \$10,500,000

AMOUNT OF LOCAL MATCH NEEDED \$2,100,000

APPLICANT **City of Tallulah**⁶

PROJECT SUMMARY Funding would be used to improve Tallulah's public water system, including the underground water distribution lines.

IIJA GRANT OPPORTUNITY(IES) FEMA - Building Resilient Infrastructure and Communities (BRIC)

DEADLINE Fall 2023

LOCAL MATCH REQUIREMENTS 25%

POTENTIAL FUNDING REQUEST \$7,800,000

AMOUNT OF LOCAL MATCH NEEDED \$1,950,000

¹Hypothetical scenario based on priorities and needs identified during initial discovery call.

²Hypothetical scenario based on priorities and needs identified during initial discovery call.

³Hypothetical scenario based on project description and cost information included Technical Assistance Program Letter of Interest.

⁴Based on 2022 data from the Louisiana Department of Health, 137 (14%) of the state's public water systems received a grade of 'D' or 'F'.

⁵Hypothetical scenario based on project description and cost information included Technical Assistance Program Letter of Interest.

⁶Hypothetical scenario based on project description and cost information included Technical Assistance Program Letter of Interest.

ADDITIONAL INFORMATION

Letters Of Interest submitted (or in draft form) for LITACorp's Technical Assistance Program

- Village of Richmond
- Town of Plain Dealing
- City of Mandeville
- City of Central
- Vermilion Parish Police Jury
- Town of Elton
- Village of Anacoco
- Terrebonne Parish Consolidated Government
- Town of Lockport
- City of Minden
- Town of Springfield
- City of Scott
- City of Grambling
- Town of Lake Arthur
- Town of Washington
- Town of Iowa
- Town of Lake Providence
- City of Leesville
- City of Slidell
- Town of Haynesville
- Iberia Parish Government
- East Feliciana Parish Police Jury
- Parish of Natchitoches
- Village of Estherwood
- Town of Oberlin
- City of Tallulah
- Town of Welsh
- Tangipahoa Parish Government
- Town of Jonesville
- City of Central Pointe
- Coupee Parish Government
- City of Carencro
- Tensas Parish Police Jury
- Town of Grand Isle
- City of Abbeville
- Town of Gramercy
- Town of Amite City
- Town of Woodworth
- Town of Sarepta
- Town of Zwolle
- Village of Simpson
- Town of Richwood
- Town of Berwick
- City of Patterson
- Town of Baldwin



IIJA FUNDING TRACKER: COST SHARE REQUIREMENTS

Source	Category	Sub Category	Program Name	Federal Agency	Bureau or Account	Program Funding	Period of Availability	Cost Share Requirements
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Advanced Energy Manufacturing and Recycling Grants	DoE	Energy Programs	\$ 750,000,000	Until Expended	Not specified
IJA	ClimateEnergyEnvironment	Resilience	Advanced Energy Security Program	DoE	Energy Programs	\$ 50,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Advanced Reactor Demonstration Program	DoE	Energy Programs	\$ 2,477,000,000	Until Expended	Not specified
IJA	Transportation	Roads, Bridges and Major Projects	Advanced Transportation Technologies and Innovative Mobility Deployment	DoT	Federal Highway Administration	\$ 900,000,000	Until Expended	80 percent Federal / 20 percent non-Federal
IJA	Broadband	Broadband	Affordable Connectivity Program	FCC	FCC	\$ 14,200,000,000	Until Expended	Not less than 25 percent of project costs
IJA	ClimateEnergyEnvironment	Water	Aging Infrastructure Account	Dol	Bureau of Reclamation	\$ 3,200,000,000	Until Expended	Per project cost allocations. Waivers are not available.
IJA	ClimateEnergyEnvironment	Resilience	Agreement With National Oceanic and Atmospheric Administration For Geostationary Operations Environmental Satellite Program	DoA	Forest Service	\$ 10,000,000	Until Expended	No non-Federal cost share required
IJA	Transportation	Airports and FAA Facilities	Airport Infrastructure Grants	DoT	Federal Aviation Administration	\$ 15,000,000,000	5 Years	Matches Airport Improvement Program (5-25 percent) for allocations, not match for contract tower grants. Waivers are not available.
IJA	Transportation	Airports and FAA Facilities	Airport Terminal Program	DoT	Federal Aviation Administration	\$ 5,000,000,000	5 Years	Large/Medium Hub 20 percent match; All others (Small, Non and Non-Primary) 5 percent match. Waivers are not available.
IJA	Transportation	Public Transportation	All Stations Accessibility Program	DoT	Federal Transit Administration	\$ 1,750,000,000	TBD	80 percent Federal / 20 percent non-Federal
IJA	Transportation	Ports and Waterways	America's Marine Highway Program Grants	DoT	Maritime Administration	\$ 25,000,000	10 Year	80 percent Federal / 20 percent non-Federal
IJA	ClimateEnergyEnvironment	Resilience	Aquatic Ecosystem Restoration And Protection Projects	Dol	Bureau of Reclamation	\$ 250,000,000	Until Expended	35 percent for construction. Waivers are not available.
IJA	ClimateEnergyEnvironment	Resilience	Aquatic Ecosystem Restoration Projects	ACoE	Corps of Engineers - Civil Works	\$ 1,900,000,000	Until Expended	In general, unless otherwise specified in law, projects are cost shared 65 percent Federal, 35 percent non-Federal.
IJA	OtherPrograms	Department of Transportation Programs	Asset Concessions	DoT	Office of the Secretary	\$ 100,000,000	Until Expended	50 percent Federal share/50 percent non-Federal
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Assisting Federal Facilities with Energy Conservation Technologies Grant Program	DoE	Energy Programs	\$ 250,000,000	Until Expended	TBD
IJA	OtherPrograms	Solid Waste Management and Recycling	Battery Labeling Guidelines	EPA	EPA	\$ 15,000,000	September 30, 2026	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Battery Manufacturing and Recycling Grants	DoE	Energy Programs	\$ 3,000,000,000	Until Expended	50 percent of the total project cost
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Battery Materials Processing Grants	DoE	Energy Programs	\$ 3,000,000,000	Until Expended	50 percent of the total project cost
IJA	OtherPrograms	Solid Waste Management and Recycling	Battery Recycling Best Practices	EPA	EPA	\$ 10,000,000		No non-Federal cost share required
IJA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Bioproduct Pilot Program	DoA	Office of the Secretary	\$ 10,000,000	Until Expended - \$5 million in 2022 and 2023	Federal cost share for grants
IJA	Transportation	Roads, Bridges and Major Projects	Bridge Investment Program	DoT	Federal Highway Administration	\$ 12,200,000,000	4 Years	50 percent Federal share/50 percent non-Federal
IJA	Broadband	Broadband	Broadband Deployment Locations Map	FCC	FCC	\$ 10,000,000	Until Expended	Not Specified
IJA	Broadband	Broadband	Broadband Equity, Access, And Deployment Program	DoC	National Telecommunications and Information Administration	\$ 42,450,000,000	Until Expended	Not Specified
IJA	ClimateEnergyEnvironment	Environmental Remediation	Brownfields Projects	EPA	EPA	\$ 1,200,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Environmental Remediation	Brownfields State & Tribal Response Programs	EPA	EPA	\$ 300,000,000	Until Expended	Not Specified
IJA	ClimateEnergyEnvironment	Resilience	Building Resilient Infrastructure and Communities (Robert T Stafford Act Section 203(i))	DHS	Federal Emergency Management Agency	\$ 1,000,000,000	5 Years	Varies
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Building, Training, And Assessment Centers	DoE	Energy Programs	\$ 10,000,000	Until Expended	TBD
IJA	OtherPrograms	Department of Transportation Programs	Bureau of Transportation Statistics	DoT	Federal Highway Administration	\$ 132,500,000	Until Expended	Varies. Waivers are not available.
IJA	Transportation	Public Transportation	Bus and Bus Facilities Competitive Grants	DoT	Federal Transit Administration	\$ 1,966,392,169	Year + 3	80 percent Federal / 20 percent non-Federal
IJA	ClimateEnergyEnvironment	Resilience	Capital Improvement And Maintenance - Construction And Maintenance Of Roads For Forest Restoration Projects That Reduce Wildfire Risk	DoA	Forest Service	\$ 100,000,000	4 Years	Varies. Waivers are not available.
IJA	ClimateEnergyEnvironment	Resilience	Capital Improvement And Maintenance - Legacy Road And Trail Remediation Program	DoA	Forest Service	\$ 250,000,000	4 Years	Varies. Waivers are not available.
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Capital Improvement and Maintenance for Dams	DoA	Forest Service	\$ 10,000,000	Until Expended	Varies. Waivers are not available.
IJA	Transportation	Public Transportation	Capital Investment Grants	DoT	Federal Transit Administration	\$ 8,000,000,000	Year +3	Varies. Waivers are not available.
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Carbon Capture Demonstration Projects Program	DoE	Energy Programs	\$ 2,537,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Carbon Capture Large-Scale Pilot Programs	DoE	Energy Programs	\$ 937,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Carbon Dioxide Transportation Infrastructure Finance and Innovation Program	DoE	Energy Programs	\$ 2,100,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Carbon Storage Validation and Testing	DoE	Energy Programs	\$ 2,500,000,000	Until Expended	TBD
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Charging and Fueling Infrastructure Grants (Community Charging)	DoT	Federal Highway Administration	\$ 1,250,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Charging and Fueling Infrastructure Grants (Corridor Charging)	DoT	Federal Highway Administration	\$ 1,250,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Civil Nuclear Credit Program	DoE	Energy Programs	\$ 6,000,000,000	2022-2026	Not applicable
IJA	ClimateEnergyEnvironment	Environmental Remediation	Clean Energy Demonstrations on Current and Former Mine Land	DoE	Energy Programs	\$ 500,000,000	Available through 2026 (no month/day provided)	Not Specified
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Clean Hydrogen Electrolysis Program	DoE	Energy Programs	\$ 1,000,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Clean Hydrogen Manufacturing Recycling Research, Development, and Demonstration Program	DoE	Energy Programs	\$ 500,000,000	Until Expended	No non-Federal cost share required
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Clean School Bus Program	EPA	Environmental Protection Agency	\$ 5,000,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Water	Clean Water State Revolving Fund	EPA	EPA	\$ 11,713,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Water	Clean Water State Revolving Fund-Emerging Contaminants	EPA	EPA	\$ 1,000,000,000	Until Expended	No non-Federal cost share required
IRA			Coastal Resilience		NOAA	\$ 575,000,000		Not Specified

IJA	ClimateEnergyEnvironment	Resilience	Coastal Zone Management	DoC	NOAA	\$ 207,000,000	2 yr for each annual tranche	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Collaborative Forest Landscape Restoration Program	DoA	Forest Service	\$ 100,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Colorado River Drought Contingency Plan	DoI	Bureau of Reclamation	\$ 300,000,000	Until Expended	TBD. Waivers are not available.
IJA	ClimateEnergyEnvironment	Resilience	Colorado River Endangered Species Recovery and Conservation Programs	DoI	Bureau of Reclamation	\$ 50,000,000	Until Expended	TBD. Waivers are not available.
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Commercial Direct Air Capture Technology Prize Competition	DoE	Energy Programs	\$ 100,000,000	Until Expended	TBD
IJA	Transportation	Safety	Commercial Motor Vehicle Enforcement Training & Support Grant Program	DoT	Federal Motor Carrier Safety Administration	\$ 25,000,000	Year of award + four years	Federal share is 100 percent
IJA	Transportation	Safety	Commercial Driver's License Implementation Program	DoT	Federal Motor Carrier Safety Administration	\$ 297,500,000	Year + 4	Federal share is at least 85 percent.
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Commercial Motor Vehicle Operators Grant Program	DoT	Federal Motor Carrier Safety Administration	\$ 16,500,000	Year + 2	Federal share is at least 85 percent.
IJA	ClimateEnergyEnvironment	Resilience	Community Wildfire Defense Grant Program For At-Risk Communities	DoA	Forest Service	\$ 1,000,000,000	Year + 4	Federal cost share for grants
IJA	Transportation	Roads, Bridges and Major Projects	Congestion Relief Program	DoT	Federal Highway Administration	\$ 250,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IJA	Transportation	Passenger and Freight Rail	Consolidated Rail Infrastructure and Safety Improvement Grants	DoT	Federal Railroad Administration	\$ 5,000,000,000	Until Expended	Year 1 - 90 percent Federal / 10 percent non-Federal
IJA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Consultations and Permitting	DoC	NOAA	\$ 20,000,000	2 for each annual tranche	1:2 Federal / non-Federal. Waivers are available.
IJA	ClimateEnergyEnvironment	Resilience	Continuing Authorities Program (Under Flood Control Act And River And Harbor Act)	ACOe	Corps of Engineers - Civil Works	\$ 465,000,000	Until Expended	In general, unless otherwise specified in law: Section 14, Section 103, Section 205 and Section 206 projects are cost-shared 50
IJA	ClimateEnergyEnvironment	Resilience	Contracts And Agreements For Restoration On Federal Lands	DoI	Office of the Secretary	\$ 50,000,000	Until Expended	No non-Federal cost share required
IJA	Transportation	Ports and Waterways	Corps of Engineers Operation and Maintenance	ACOe	Corps of Engineers - Civil Works	\$ 4,000,000,000	Until Expended	Requirements vary according to applicable laws
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Cost-effective Codes Implementation for Efficiency and Resilience	DoE	Energy Programs	\$ 225,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Countering Violent Extremism	DHS	Science and Technology	\$ 12,800,000	5 Years	Not Specified
IJA	Transportation	Safety	Crash Data	DoT	National Highway Traffic Safety Administration	\$ 750,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IJA	ClimateEnergyEnvironment	Resilience	Critical Infrastructure Security and Resilience Research	DHS	Science and Technology	\$ 69,806,250	5 Years	Not Specified
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Critical Material Innovation, Efficiency, And Alternatives	DoE	Energy Programs	\$ 600,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Critical Material Supply Chain Research Facility	DoE	Energy Programs	\$ 75,000,000	Until Expended	Not applicable
IJA	ClimateEnergyEnvironment	Resilience	Cyber Response and Recovery Fund	DHS	Cybersecurity and Infrastructure Security Agency	\$ 100,000,000	5 Years	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Cybersecurity	DHS	Science and Technology	\$ 14,500,000	5 Years	Not Specified
IJA	ClimateEnergyEnvironment	Resilience	Cybersecurity for the Energy Sector Research, Development, and Demonstration Program	DoE	Energy Programs	\$ 250,000,000	Until Expended	Not Specified
IJA	ClimateEnergyEnvironment	Water	Dam Safety Program	DoI	Bureau of Reclamation	\$ 500,000,000	Until Expended	85 percent Federal, 15 percent non-Federal
IJA	OtherPrograms	Regional Commission Programs	Delta Regional Authority	Delta Regional Authority	Delta Regional Authority	\$ 150,000,000	Until Expended	Varies
IJA	ClimateEnergyEnvironment	Resilience	Department of Interior Wildfire Management - Burned Area Rehabilitation	DoI	Departmental Offices	\$ 325,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Department of Interior Wildfire Management - Preparedness	DoI	Departmental Offices	\$ 245,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Develop And Publish Every 5 Years A Map Depicting At-Risk Communities, Including Tribal Communities	DoA	Forest Service	\$ 1,200,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Direct Federal Spending (Or Other) For National Revegetation Strategy	DoI	Office of the Secretary	\$ 70,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Direct Federal Spending For Invasives	DoI	Office of the Secretary	\$ 100,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Direct Federal Spending For Resilient Recreation Sites	DoI	Office of the Secretary	\$ 45,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Environmental Remediation	Direct Federal Spending for Revegetation of Mined Lands	DoI	Office of the Secretary	\$ 100,000,000	Until Expended	No non-Federal cost share required
IJA	Transportation	Roads, Bridges and Major Projects	Disadvantaged Business Enterprises	DoT	Federal Highway Administration	\$ 50,000,000	Until Expended	No non-Federal cost share required
IJA	Broadband	Broadband	Distance Learning, Telemedicine, And Broadband Program: Broadband Loans	DoA	Rural Utilities Service	\$ 74,000,000	Until Expended	Not less than 30 percent of project costs. Waivers
IJA	Broadband	Broadband	Distance Learning, Telemedicine, And Broadband Program: Reconnect Program	DoA	Rural Utilities Service	\$ 1,926,000,000	Until Expended	Not Specified
IJA	ClimateEnergyEnvironment	Water	Drinking Water State Revolving Fund	EPA	EPA	\$ 11,713,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Water	Drinking Water State Revolving Fund Emerging Contaminants (incl. PFAS)	EPA	EPA	\$ 4,000,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Water	Drinking Water State Revolving Fund Lead Service Lines Replacement	EPA	EPA	\$ 15,000,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Earth Mapping Resources Initiative	DoI	US Geological Survey	\$ 320,000,000	Year + 3	TBD
IJA	ClimateEnergyEnvironment	Resilience	Ecological Health Restoration Contracts	DoA	Forest Service	\$ 150,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Resilience	Ecosystem - Delaware River Basin Conservation Act	DoI	US Fish and Wildlife Service	\$ 26,000,000	Until Expended	Yes
IJA	ClimateEnergyEnvironment	Resilience	Ecosystem - Fish Passage	DoI	US Fish and Wildlife Service	\$ 200,000,000	Until Expended	Yes
IRA			Elective Pay and Transferability					Not Specified
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Electric Drive Vehicle Battery Recycling and 2nd Life Apps	DoE	Energy Programs	\$ 200,000,000	Until Expended	Not specified
IJA	Transportation	Electric Vehicles, Buses, and Ferries	Electric or Low-Emitting Ferry Program	DoT	Federal Transit Administration	\$ 250,000,000	TBD	Varies. Waivers are not available.
IJA	ClimateEnergyEnvironment	Resilience	Emergency Watershed Protection Program	DoA	Natural Resources Conservation Service	\$ 300,000,000	Until Expended	Yes (25 percent non-Federal). Waivers
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy and Minerals Research Facility	DoI	US Geological Survey	\$ 167,000,000	Until Expended	Not specified
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Auditor Training Grant Program	DoE	Energy Programs	\$ 40,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Efficiency and Conservation Block Grant Program	DoE	Energy Programs	\$ 550,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Efficiency Materials Pilot Program	DoE	Energy Programs	\$ 50,000,000	Until Expended	TBD
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Efficient Transformer Rebates	DoE	Energy Programs	\$ 10,000,000	Until Expended	No non-Federal cost share required
IJA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Improvement in Rural or Remote Areas	DoE	Energy Programs	\$ 1,000,000,000	Until Expended	TBD

IUA	ClimateEnergyEnvironment	Resilience	Energy Sector Operational Support for Cyber Resilience Program	DoE	Energy Programs	\$ 50,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Energy Storage Demonstration and Pilot Grant Program	DoE	Energy Programs	\$ 355,000,000	Until Expended	50 percent
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Enhanced Geothermal Systems and Pilot Demonstrations	DoE	Energy Programs	\$ 84,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Resilience	Explosives Threat Assessment	DHS	Science and Technology	\$ 2,800,000	5 Years	Not Specified
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Extended Product System Rebates	DoE	Energy Programs	\$ 10,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Airports and FAA Facilities	Facilities and Equipment	DoT	Federal Aviation Administration	\$ 5,000,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Federal Lands Transportation Programs (funds for National Park Service)	DoT	Federal Highway Administration	\$ 1,731,187,250	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Federal Lands Transportation Programs (funds for US Fish and Wildlife Service)	DoT	Federal Highway Administration	\$ 180,000,000	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Federal Lands Transportation Program (for other Federal Land Management Agencies)	DoT	Federal Highway Administration	\$ 153,637,750	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Federal Lands Transportation Program (Funding for US Forest Service)	DoT	Federal Highway Administration	\$ 130,000,000	4 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Federal Wildland Firefighter Salaries And Expenses	DoA	Forest Service	\$ 480,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Passenger and Freight Rail	Federal-State Partnership for Intercity Passenger Rail Grants	DoT	Federal Railroad Administration	\$ 36,000,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Public Transportation	Ferry Service for Rural Communities	DoT	Federal Transit Administration	\$ 2,000,000,000	TBD	Varies. Waivers are not available.
IUA	ClimateEnergyEnvironment	Resilience	Financial Assistance To Facilities That Purchase And Process Byproducts For Ecosystem Restoration Projects	DoA	Forest Service	\$ 400,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Firewood Banks	DoA	Forest Service	\$ 8,000,000	4 Years	Federal cost share for grants
IUA	ClimateEnergyEnvironment	Resilience	First Responder Capability	DHS	Science and Technology	\$ 4,000,000	5 Year	Not Specified
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Fish Passage	DoC	NOAA	\$ 400,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Flood and Inundation Mapping and Forecasting, Water Modeling, and Precipitation Studies	DoC	NOAA	\$ 492,000,000	2 yr for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Flood Control and Coastal Emergencies	ACoE	Corps of Engineers - Civil Works	\$ 251,000,000	Until Expended	Varies
IUA	ClimateEnergyEnvironment	Resilience	Flood Mitigation Assistance Grants (National Flood Insurance Act Sec 1366)	DHS	Federal Emergency Management Agency	\$ 3,500,000,000	5 years	Varies
IUA	ClimateEnergyEnvironment	Resilience	Flood Plain Management Services	ACoE	Corps of Engineers - Civil Works	\$ 45,000,000	Until Expended	In general, unless otherwise specified in law,
IUA	ClimateEnergyEnvironment	Resilience	Forest Health Management on Federal Lands Program and Forest Health Management on Cooperative Lands Program	DoA	Forest Service	\$ 100,000,000	4 Years	Yes. Waivers are available.
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Four Regional Clean Direct Air Capture Hubs	DoE	Energy Programs	\$ 3,500,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Front-End Engineering and Design Program Out Activities Under Carbon Capture Tech Program 962 Of EPA	DoE	Energy Programs	\$ 100,000,000	Until Expended	65/35. Waivers are not available.
IUA	ClimateEnergyEnvironment	Resilience	Fuel Breaks	DoA	Forest Service	\$ 250,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Environmental Remediation	Funding to Support Orphan Well Plugging	DoE	Energy Programs	\$ 30,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Water	Geographic Programs - Gulf of Mexico	EPA	EPA	\$ 53,000,000	Until Expended	Yes. Waivers are available.
IUA	ClimateEnergyEnvironment	Water	Geographic Programs - Lake Pontchartrain Restoration Program	EPA	EPA	\$ 53,000,000	Until Expended	Yes. Waivers are available.
IUA	OtherPrograms	Departments of Health and Human Services and the Interior Programs	Good Neighbor Agreements with States and Tribes	DoI	Office of the Secretary	\$ 40,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Grants for Energy Efficiency and Renewable Energy Improvements at Public School Facilities	DoE	Energy Programs	\$ 500,000,000	Until Expended	TBD
IUA	Transportation	Roads, Bridges and Major Projects	Grants for Planning, Feasibility Analysis, and Revenue Forecasting (Bridge Investment Program Set Aside)	DoT	Federal Highway Administration	\$ 100,000,000	4 Years	Generally, not to exceed Federal share under 23
IUA	ClimateEnergyEnvironment	Resilience	Grants For States And Tribes For Voluntary Restoration	DoI	Office of the Secretary	\$ 400,000,000	Until Expended	Grants for States and Tribes for voluntary
IUA	OtherPrograms	Department of Transportation Programs	Growing State Apportionments	DoT	Federal Transit Administration	\$ 2,055,665,467	Until Expended	No non-Federal cost share required
IUA	OtherPrograms	Department of Transportation Programs	Growing States and High-Density States Formula	DoT	Federal Transit Administration	\$ 1,822,948,622	Until Expended	Varies. Waivers are not available.
IUA	OtherPrograms	EPA Programs	Gulf Hypoxia	EPA	EPA	\$ 60,000,000	Until Expended	See 23 U.S.C. 120 (default)
IUA	ClimateEnergyEnvironment	Resilience	Habitat Restoration	DoC	NOAA	\$ 491,000,000	2 yr for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Hazard Mitigation Revolving Loan Funds/Safeguarding Tomorrow through Ongoing Risk Mitigation (STORM) Act (Robert T Stafford Act, Sec 205)	DHS	Federal Emergency Management Agency	\$ 500,000,000	5 Years	90 percent Federal/10 percent Non-Federal;
IUA	ClimateEnergyEnvironment	Resilience	Hazardous Fuels (Mechanical Thinning And Timber Harvesting: Precommercial Thinning In Young Growth)	DoA	Forest Service	\$ 400,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Hazardous Fuels Management	DoA	Forest Service	\$ 514,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Hazardous Materials and Emergency Preparedness Grants	DoT	Pipeline and Hazardous Materials Safety Administration	\$ 234,125,000	Until Expended	Some grants have a cost share requirement of 20
IUA	Transportation	Safety	High Priority Activities Program	DoT	Federal Motor Carrier Safety Administration	\$ 432,500,000	Year of award + 2 or Years of award + four,	Federal share at least 85 percent
IUA	Transportation	Safety	High-Visibility Enforcement	DoT	National Highway Traffic Safety Administration	\$ 201,600,000	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Highway Research and Development Program	DoT	Federal Highway Administration	\$ 310,000,000	Until Expended	80 percent Federal / 20 percent non-Federal
IUA	Transportation	Safety	Highway Safety Improvement Program	DoT	Federal Highway Administration	\$ 15,557,499,996	4 Years	90 percent Federal / 10 percent non-Federal.
IUA	Transportation	Safety	Highway Safety Research & Development	DoT	National Highway Traffic Safety Administration	\$ 970,000,000	4 Years	Up to 100 percent Federal
IUA	Transportation	Roads, Bridges and Major Projects	Highway Use Tax Evasion Projects	DoT	Federal Highway Administration	\$ 20,000,000	4 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Hydroelectric Production Incentives	DoE	Energy Programs	\$ 125,000,000	Until Expended	85%±20 percent of the total project cost
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Hydropower Research, Development, and Demonstration	DoE	Energy Programs	\$ 36,000,000	Until Expended	N/A
IUA	ClimateEnergyEnvironment	Water	Indian Health Service Sanitation Facilities Construction Program	DHHS	Indian Health Service	\$ 3,500,000,000	Until Expended	Non-eligible activities include the cost to serve
IUA	ClimateEnergyEnvironment	Water	Indian Water Rights Settlements	DoI	Bureau of Indian Affairs	\$ 2,500,000,000	Until Expended	Not specified
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Industrial Emission Demonstration Projects	DoE	Energy Programs	\$ 500,000,000	Until Expended	TBD
			INFRA Grants	DoT	Office of the Under Secretary for Policy	\$ 3,100,000		

IUA	ClimateEnergyEnvironment	Clean Energy and Power	Industrial Research and Assessment Center Implementation Grants	DoE	Energy Programs	\$ 400,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Industrial Research and Assessment Centers	DoE	Energy Programs	\$ 150,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Inland Flood Risk Management Projects	ACoE	Corps of Engineers - Civil Works	\$ 2,500,000,000	Until Expended	In general, unless otherwise specified in law, projects are cost shared 65 percent Federal, 35 percent non-Federal.
IUA	Transportation	Ports and Waterways	Inland Waterways Projects	ACoE	Corps of Engineers - Civil Works	\$ 2,500,000,000	Until Expended	In general, unless otherwise specified in law, projects are 100 percent Federally funded.
IUA	Transportation	Roads, Bridges and Major Projects	Intelligent Transportation Systems Program	DoT	Federal Highway Administration	\$ 250,000,000	Until Expended	80 percent Federal / 20 percent non-Federal for
IUA	ClimateEnergyEnvironment	Resilience	Joint Chiefs Landscape Restoration Partnership Program	DoA	Forest Service	\$ 180,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Ports and Waterways	Land Port of Entry Modernization	DHS	US Customs and Border Protection	\$ 330,000,000	5 Years	No non-Federal cost share required
IUA	Transportation	Ports and Waterways	Land Port of Entry Modernization	DHS	US Customs and Border Protection	\$ 100,000,000	5 Years	No non-Federal cost share required
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Landscape Scale Restoration Water Quality and Fish Passage	DoA	Forest Service	\$ 80,000,000	Until Expended	Yes. Waivers are available.
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Lithium-Ion Recycling Prize	DoE	Energy Programs	\$ 10,000,000	Until Expended	Not applicable
IUA	Transportation	Roads, Bridges and Major Projects	Local and Regional Project Assistance Grants (RAISE)	DoT	Office of the Secretary	\$ 7,500,000,000	4 Years	Grant can provide up to 60 percent of total project
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Long-Duration Energy Storage Demonstration Initiative and Joint Program	DoE	Energy Programs	\$ 150,000,000	Until Expended	Not specified
IUA	OtherPrograms	Departments of Health and Human Services and the Interior Programs	Low Income Home Energy Assistance Program	DHHS	Administration for Children and Families	\$ 500,000,000	2022 - 2026	30 percent
IUA	Transportation	Electric Vehicles, Buses, and Ferries	Low or No Emission (Bus) Grants	DoT	Federal Transit Administration	\$ 5,624,550,890	Year + 3	Varies. Waivers are not available.
IUA	Transportation	Electric Vehicles, Buses, and Ferries	Low or No Emission Vehicle Component Assessment Program	DoT	Federal Transit Administration	\$ 26,169,974	TBD	50 percent Federal share/50 percent non-Federal
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Maintaining and Enhancing Hydroelectricity Incentives	DoE	Energy Programs	\$ 553,600,000	Until Expended	Not applicable
IUA	Transportation	Ports and Waterways	Major Rehabilitation for Rivers and Harbors	ACoE	Corps of Engineers - Civil Works	\$ 1,500,000,000	Until Expended	In general, unless otherwise specified in law, projects are 100 percent Federally funded.
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Manufacturing Leadership	DoE	Energy Programs	\$ 50,000,000	Until Expended	No non-Federal cost share required
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Marine Debris	DoC	NOAA	\$ 150,000,000	2 for each annual tranche	2:1 Federal / non-Federal. Waivers are available.
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Marine Debris	DoC	NOAA	\$ 50,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Marine Energy Research, Development, and Demonstration	DoE	Energy Programs	\$ 70,400,000	Until Expended	TBD
IUA	Broadband	Broadband	Middle Mile Grant Program	DoC	National Telecommunications and Information Administration	\$ 1,000,000,000	fiscal 2022-2026	Grants may not cover more than 90 percent of the
IUA	Transportation	Ports and Waterways	Mississippi River and Tributaries	ACoE	Corps of Engineers - Civil Works	\$ 808,000,000	Until Expended	In general, unless otherwise specified in law, projects are 100 percent Federally funded.
IUA	Transportation	Safety	Motor Carrier Safety Operations and Programs	DoT	Federal Motor Carrier Safety Administration	\$ 1,925,000,000	Until Expended - Anually	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Multi-Benefit Projects To Improve Watershed Health	Dol	Bureau of Reclamation	\$ 100,000,000	Until Expended	50 percent. Waivers are not available.
IUA	Transportation	Public Transportation	Nation Rural Transportation Assistance Program	DoT	Federal Transit Administration	\$ 13,743,783	Year + 2	Not Specified
IUA	Transportation	Roads, Bridges and Major Projects	National Culvert Removal, Replacement, & Restoration Grant	DoT	Office of the Secretary	\$ 1,000,000,000	Until Expended	80 percent Federal / 20 percent non-Federal cost
IUA	ClimateEnergyEnvironment	Clean Energy and Power	National Dam Safety Program	DHS	Federal Emergency Management Agency	\$ 215,000,000	Until Expended/ 4	Not specified
IUA	Transportation	Safety	National Driver Register	DoT	National Highway Traffic Safety Administration	\$ 36,000,000	4 Years	No non-Federal cost share required
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	National Estuarine Research Reserve System	DoC	NOAA	\$ 77,000,000	2 for each annual tranche	1:1 Federal / non-Federal. Waivers are available.
IUA	ClimateEnergyEnvironment	Resilience	National Geological And Geophysical Data Preservation Program	Dol	US Geological Survey	\$ 23,668,000	Year + 3	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	National Infrastructure Project Assistance (Megaprojects)	DoT	Office of the Secretary	\$ 5,000,000,000	Until Expended	75 percent Federal/25 percent non-Federal for
IUA	ClimateEnergyEnvironment	Clean Energy and Power	National Marine Energy Centers	DoE	Energy Programs	\$ 40,000,000	Until Expended	TBD
IUA	Transportation	Roads, Bridges and Major Projects	National Motor Vehicle Per-Mile User Fee	DoT	Federal Highway Administration	\$ 50,000,000	Until Expended	80 percent Federal / 20 percent non-Federal
IUA	ClimateEnergyEnvironment	Resilience	National Oceans and Coastal Security Fund	DoC	NOAA	\$ 492,000,000	2 yr for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	National Seed Strategy	DoA	Forest Service	\$ 60,000,000	4 Years	TBD
IUA	Transportation	Roads, Bridges and Major Projects	Nationally Significant Federal Lands and Tribal Projects	DoT	Federal Highway Administration	\$ 275,000,000	4 Years	90 percent Federal / 10 percent non-Federal.
IUA	Transportation	Roads, Bridges and Major Projects	Nationally Significant Freight and Highway Projects (INFRA)	DoT	Office of the Secretary	\$ 7,250,000,000	4 Years	60 percent Federal/40 percent non-Federal,
IUA	Transportation	Safety	Natural Gas Distribution Infrastructure Safety and Modernization Grants	DoT	Pipeline and Hazardous Materials Safety Administration	\$ 1,000,000,000	11 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Network and System Security and Investment	DHS	Science and Technology	\$ 1,000,000	5 Years	Not Specified
IRA			NOAA Climate Resilience Regional Challenge					
IRA			NOAA Climate Resilience Regional Challenge					
IUA	ClimateEnergyEnvironment	Resilience	Ocean And Coastal Observing Systems	DoC	NOAA	\$ 100,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Ocean And Coastal Observing Systems	DoC	NOAA	\$ 50,000,000	3 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	On-the-Job Training Program	DoT	Federal Highway Administration	\$ 50,000,000	Until Expended	Varies based on application of 23 USC 120.
IUA	ClimateEnergyEnvironment	Environmental Remediation	Orphaned Well Site Plugging, Remediation, And Restoration	Dol	Department-Wide Programs	\$ 4,677,000,000	Through September 30, 2030	No non-Federal cost share required
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Pacific Coastal Salmon Recovery Fund	DoC	NOAA	\$ 172,000,000	2 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Physical Security	DHS	Science and Technology	\$ 38,800,000	5 Years	Not Specified
IUA	Transportation	Public Transportation	Pilot Program for Enhanced Mobility	DoT	Federal Transit Administration	\$ 24,102,620	Year + 2	No non-Federal cost share required
IUA	Transportation	Public Transportation	Pilot Program for Transit Oriented Development	DoT	Federal Transit Administration	\$ 68,864,631	Until Expended	Varies. Waivers are available.
IUA	ClimateEnergyEnvironment	Resilience	Planning Assistance To States	ACoE	Corps of Engineers - Civil Works	\$ 30,000,000	Until Expended	In general, unless otherwise specified in law,
IUA	ClimateEnergyEnvironment	Resilience	Pollution Prevention Grants	EPA	EPA	\$ 100,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Ports and Waterways	Port Infrastructure Development Program Grants	DoT	Maritime Administration	\$ 2,250,000,000	10 Years	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Resilience	Post-Fire Restoration	DoA	Forest Service	\$ 100,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Power Marketing Administration Transmission Borrowing Authority	DoE	Power Marketing Administration	\$ 10,000,000,000	≤ \$6B in borrowing auth by 2028	N/A
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Pre-Commercial Direct Air Capture Prize Competitions	DoE	Energy Programs	\$ 15,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Resilience	Preplanning Fire Response Workshops And Workforce Training	DoA	Forest Service	\$ 50,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Prescribed Fires	DoA	Forest Service	\$ 250,000,000	Until Expended	No non-Federal cost share required

IUA	ClimateEnergyEnvironment	Clean Energy and Power	Preventing Outages and Enhancing the Resilience of the Electric Grid / Hazard Hardening	DoE	Energy Programs	\$ 5,000,000,000	Until Expended	States, Territories and Tribes â€” 15 percent cost
IUA	OtherPrograms	Department of Transportation Programs	Prioritization Process Pilot Program	DoT	Federal Highway Administration	\$ 50,000,000	4 Years	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Resilience	Probabilistic Analysis of National Threats, Hazards, and Risks	DHS	Science and Technology	\$ 13,400,000	5 Years	Not Specified
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Program Upgrading Our Electric Grid and Ensuring Reliability and Resiliency	DoE	Energy Programs	\$ 5,000,000,000	2022-2026	At least a 20 percent cost-share for a funded research or development activity, unless the activity is of a basic or fundamental
IUA	ClimateEnergyEnvironment	Resilience	Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation (PROTECT) - Discretionary	DoT	Federal Highway Administration	\$ 1,400,000,000	4 Years	Varies
IUA	ClimateEnergyEnvironment	Resilience	Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation (PROTECT) - Discretionary	DoT	Federal Highway Administration	\$ 1,400,000,000	4 Years	Varies
IUA	ClimateEnergyEnvironment	Resilience	Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation (PROTECT) - Formula	DoT	Federal Highway Administration	\$ 7,299,999,998	4 years	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Resilience	Provide Financial Assistance To States, Tribes, And Units Of Local Government To Establish And Operate Reverse-911 Telecommunication Systems	DoA	Forest Service	\$ 30,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Public Transportation	Public Transportation Technical Assistance and Workforce Development	DoT	Federal Transit Administration	\$ 27,545,852	Until Expended	80 percent Federal / 20 percent non-Federal.
IUA	Transportation	Public Transportation	Public Transportation on Indian Reservations Competitive	DoT	Federal Transit Administration	\$ 45,812,610	Year + 2	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Pumped Storage Hydropower Wind and Solar Integration and System Reliability Initiative	DoE	Energy Programs	\$ 10,000,000	Until Expended	Matching funds equal to or greater than the
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Purchase of Power and Transmission Services	DoE	Power Marketing Administration	\$ 500,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Public Transportation	Rail Vehicle Replacement Grants	DoT	Federal Transit Administration	\$ 1,500,000,000	Year + 3	80 percent Federal / 20 percent non-Federal.
IUA	Transportation	Safety	Railroad Crossing Elimination Grants	DoT	Federal Railroad Administration	\$ 3,000,000,000	Until Expended	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Rare Earth Elements Demonstration Facility	DoE	Energy Programs	\$ 140,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Rare Earth Security Activities	DoE	Energy Programs	\$ 127,000,000	Until Expended	Not specified
IUA	Transportation	Ports and Waterways	Real Property Activities	GSA	Real Property Activities	\$ 3,418,008,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Reconnecting Communities Pilot Program	DoT	Federal Highway Administration	\$ 1,000,000,000	Until Expended	80 percent Federal / 20 percent non-Federal.
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Recreation Sites	DoA	Forest Service	\$ 55,000,000	Until Expended	Varies. Waivers are not available.
IUA	OtherPrograms	Solid Waste Management and Recycling	Reduce, Reuse, Recycling Education and Outreach Grants	EPA	EPA	\$ 75,000,000	September 30, 2026	No non-Federal cost share required
IUA	Transportation	Ports and Waterways	Reduction of Truck Emissions at Port Facilities	DoT	Federal Highway Administration	\$ 400,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IUA	ClimateEnergyEnvironment	Resilience	Reforestation Trust Fund (Replant Act)	DoA	Forest Service	\$ 528,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Regional Clean Hydrogen Hubs	DoE	Energy Programs	\$ 8,000,000,000	Until Expended	TBD
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Regional Ocean Partnerships	DoC	NOAA	\$ 56,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Regulatory Program	ACoE	Corps of Engineers - Civil Works	\$ 160,000,000	2022 - 2026	No cost share requirement. Applicants can elect to
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Rehabilitation of High Hazard Potential Dams	DHS	Federal Emergency Management Agency	\$ 585,000,000	Until Expended	Not specified
IUA	ClimateEnergyEnvironment	Resilience	Removal Of Vegetation For Biochar And Innovative Wood Products	DoA	Forest Service	\$ 100,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Research And Development Via Joint Fire Science Program Partnership With Department Of Interior	DoA	Forest Service	\$ 10,000,000	\$2 million tranch5-years	No non-Federal cost share required
IUA	Transportation	Public Transportation	Research, Development, Demonstration and Deployment Projects	DoT	Federal Transit Administration	\$ 132,218,677	Until Expended	No non-Federal cost share required
IUA	Transportation	Passenger and Freight Rail	Restoration & Enhancement Grant Program	DoT	Federal Railroad Administration	\$ 250,000,000	Until Expended	Varies. Waivers are not available.
IUA	ClimateEnergyEnvironment	Resilience	Restoration Projects Via States And Tribes	DoA	Forest Service	\$ 160,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Restore Native Vegetation On Federal/Non-Federal Land	DoA	Forest Service	\$ 100,000,000	Until Expended	Varies. Waivers are not available.
IUA	ClimateEnergyEnvironment	Resilience	Revegetation Effort to Implement National Seed Strategy	DoA	Forest Service	\$ 70,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Rural And Municipal Utility Advances Cybersecurity Grant And Technical Assistance Program	DoE	Energy Programs	\$ 250,000,000	Until Expended	Not Specified
IUA	Transportation	Roads, Bridges and Major Projects	Rural Surface Transportation Grant Program	DoT	Office of the Secretary	\$ 2,000,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IUA	ClimateEnergyEnvironment	Water	Rural Water Projects	DoI	Bureau of Reclamation	\$ 1,000,000,000	Until Expended	Cost share applies to E. New Mex project, but
IUA	Transportation	Safety	Safe Streets and Roads for All	DoT	Office of the Secretary	\$ 5,000,000,000	Until Expended	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Water	Safety of Dams, Water Sanitation, And Other Facilities	DoI	Bureau of Indian Affairs	\$ 200,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Electric Vehicles, Buses, and Ferries	Safety-Related Activities (Set-aside)	DoT	Federal Highway Administration	\$ 17,500,000	4 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Section 118 Of Water Resources Development Act of 2020	ACoE	Corps of Engineers - Civil Works	\$ 30,000,000	Until Expended	In general, unless otherwise specified in law,
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Section 243 Hydroelectric Efficiency Improvement Incentives	DoE	Energy Programs	\$ 75,000,000	Until Expended	TBD
IUA	ClimateEnergyEnvironment	Resilience	Sector Risk Management Agencies	DHS	Cybersecurity and Infrastructure Security Agency	\$ 35,000,000	5 Years	No non-Federal cost share required
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Secure Rural Schools	DoA	Forest Service	\$ 585,000,000	Until Expended	Maximum Southeast Crescent Regional
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Smart Grid Investment Matching Grant Program	DoE	Energy Programs	\$ 3,000,000,000	Until Expended	A 50 percent cost-share of total costs.
IUA	ClimateEnergyEnvironment	Water	Soil Moisture and Snowpack Pilot Program	DoC	NOAA	\$ 1,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	OtherPrograms	Solid Waste Management and Recycling	Solid Waste Infrastructure for Recycling Infrastructure Grants	EPA	EPA	\$ 275,000,000	Until Expended	No non-Federal cost share required
IUA	OtherPrograms	Regional Commission Programs	Southeast Crescent Regional Commission Funding	Southeast Crescent Regional Commission	Southeast Crescent Regional Commission	\$ 5,000,000	Until Expended	Maximum Northern Border Regional Commission
IUA	ClimateEnergyEnvironment	Resilience	Southwest Ecological Restoration Institute	DoA	Forest Service	\$ 20,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	State and Local Cybersecurity Grant Program	DHS	Cybersecurity and Infrastructure Security Agency	\$ 1,000,000,000	4 Years	fiscal year 2022 for individual recipients: 90
IUA	Broadband	Broadband	State Digital Equity Capacity Grant	DoC	National Telecommunications and Information Administration	\$ 1,440,000,000	Until Expended	No non-Federal cost share required

IUA	Broadband	Broadband	State Digital Equity Competitive Grant	DoC	National Telecommunications and Information Administration	\$ 1,250,000,000	Until Expended	Grants may not cover more than 90 percent of the
IUA	Broadband	Broadband	State Digital Equity Planning Grant	DoC	National Telecommunications and Information Administration	\$ 60,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	State Fire Assistance	DoA	Forest Service	\$ 88,000,000	4 Years	Yes. Waivers are available.
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	State Forest Action Plans	DoA	Forest Service	\$ 200,000,000	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	State Incentives Pilot Program (Set-aside within Nationally Significant Freight and Highway Projects - INFRA)	DoT	Office of the Secretary	\$ 750,000,000	4 Years	50 percent Federal/50 percent non-Federal. For
IUA	Transportation	Roads, Bridges and Major Projects	Strategic Innovation for Revenue Collection (Set-aside)	DoT	Federal Highway Administration	\$ 75,000,000	Until Expended	80 percent Federal / 20 percent non-Federal (for
IUA	Transportation	Public Transportation	Strengthening Mobility and Revolutionizing Transportation (SMART) Grants	DoT	Federal Transit Administration	\$ 500,000,000	Until Expended	Varies. Waivers are available.
IUA	ClimateEnergyEnvironment	Environmental Remediation	Superfund	EPA	EPA	\$ 3,500,000,000	Until Expended	No non-Federal cost share required
IUA	OtherPrograms	Department of Transportation Programs	Technology & Innovation Deployment Program	DoT	Federal Highway Administration	\$ 90,000,000	Until Expended	100 percent
IUA	OtherPrograms	Departments of Commerce, Agriculture and Energy Programs	Temporary Water Crossing Structures	DoA	Forest Service	\$ 50,000,000	4 Years	Varies. Waivers are not available.
IUA	ClimateEnergyEnvironment	Resilience	To Complete Or Initiate And Complete Studies That Were Authorized Prior To The Date Of This Act	ACoE	Corps of Engineers - Civil Works	\$ 45,000,000	Until Expended	In general, unless otherwise specified in law,
IUA	OtherPrograms	Department of Transportation Programs	Training & Education	DoT	Federal Highway Administration	\$ 127,500,000	Until Expended	Not specified
IUA	Transportation	Public Transportation	Transit Cooperative Research Program	DoT	Federal Transit Administration	\$ 34,432,315	Until Expended	80 percent Federal / 20 percent non-Federal.
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Transmission Facilitation Program	DoE	Energy Programs	\$ 2,500,000,000	Until Expended	N/A
IUA	Transportation	Roads, Bridges and Major Projects	Transportation Infrastructure Finance and Innovation Act	DoT	Office of the Secretary	\$ 1,250,000,000	4 Years	80 percent Federal / 20 percent non-Federal
IUA	Broadband	Broadband	Tribal Broadband Connectivity Program	DoC	National Telecommunications and Information Administration	\$ 2,000,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Tribal Climate Resilience - Adaptation Planning	Dol	Bureau of Indian Affairs	\$ 86,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Tribal Climate Resilience - Community Relocation	Dol	Bureau of Indian Affairs	\$ 130,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Tribal High Priority Projects Program	DoT	Federal Highway Administration	\$ 45,000,000	4 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Water	Tribal Irrigation and Power Systems	Dol	Bureau of Indian Affairs	\$ 50,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Tribal Transportation Facility Bridge (set-aside)	DoT	Federal Highway Administration	\$ 200,000,000	4 Years	No non-Federal cost share required
IUA	Transportation	Roads, Bridges and Major Projects	Tribal Transportation Facility Bridges (Bridge Formula Funding Set-Aside)	DoT	Federal Highway Administration	\$ 825,000,000	4 Years	100 percent Federal share
IUA	ClimateEnergyEnvironment	Water	Underground Injection Control Grants: Class VI wells	EPA	EPA	\$ 50,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Public Transportation	University Transportation Centers (UTC) Program	DoT	Federal Transit Administration	\$ 500,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Public Transportation	Urbanized Area Passenger Ferry Program	DoT	Federal Transit Administration	\$ 150,000,000	Year + 5	Varies. Waivers are not available.
IUA	Transportation	Safety	Vehicle Safety and Behavioral Research	DoT	National Highway Traffic Safety Administration	\$ 548,500,000	4 Years	Up to 100 percent Federal
IUA	ClimateEnergyEnvironment	Resilience	Volunteer Fire Assistance	DoA	Forest Service	\$ 20,000,000	4 Years	Yes. Waivers are available.
IUA	ClimateEnergyEnvironment	Water	Water & Groundwater Storage, And Conveyance	Dol	Bureau of Reclamation	\$ 1,150,000,000	Until Expended	50 percent Federal owned, 75 percent for State.
IUA	ClimateEnergyEnvironment	Water	Water Desalination Projects	Dol	Bureau of Reclamation	\$ 250,000,000	Until Expended	75 percent non-Federal, up to 25 percent from
IUA	ClimateEnergyEnvironment	Resilience	Water Infrastructure Finance and Innovation Program Account	ACoE	Corps of Engineers - Civil Works	\$ 75,000,000	Until Expended	Not Specified
IUA	ClimateEnergyEnvironment	Water	Water Infrastructure Improvements for the Nation, Small and Underserved Communities Emerging Contaminants Grant Program	EPA	EPA	\$ 5,000,000,000	from 2022-2026.	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Water	Water Recycling	Dol	Bureau of Reclamation	\$ 1,000,000,000	Until Expended	75 percent non-Federal, up to 25 percent from
IUA	ClimateEnergyEnvironment	Water	Water Resources Development Act Data Acquisition	DoC	NOAA	\$ 25,000,000	2 for each annual tranche	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Water-Related Environmental Infrastructure Assistance	ACoE	Corps of Engineers - Civil Works	\$ 200,000,000	Until Expended	In general, unless otherwise specified in law,
IUA	ClimateEnergyEnvironment	Resilience	Watershed And Flood Prevention Operations	DoA	Natural Resources Conservation Service	\$ 500,000,000	Until Expended	Varies. Waivers are available in some
IUA	ClimateEnergyEnvironment	Water	Watershed Management Projects	Dol	Bureau of Reclamation	\$ 100,000,000	Until Expended	50 percent for some projects. Waivers are not
IUA	ClimateEnergyEnvironment	Clean Energy and Power	Watershed Rehabilitation Program	DoA	Natural Resources Conservation Service	\$ 118,000,000	Until Expended	Not applicable
IUA	ClimateEnergyEnvironment	Water	WaterSMART Grants	Dol	Bureau of Reclamation	\$ 400,000,000	Until Expended	Varies, 50 percent, 25 percent, up to 65 percent
IUA	ClimateEnergyEnvironment	Resilience	Wildfire	DoC	NOAA	\$ 50,000,000	3 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Wildfire	DoC	NOAA	\$ 50,000,000	2 Years	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Wildfire Detection And Monitoring Equipment	DoA	Forest Service	\$ 5,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Wildfire Management - Fuels Management	Dol	Departmental Offices	\$ 878,000,000	Until Expended	No non-Federal cost share required
IUA	ClimateEnergyEnvironment	Resilience	Wildfire Management - Joint Fire Science Program with Department of Agriculture	DoA	Departmental Offices	\$ 10,000,000	Until Expended	No non-Federal cost share required
IUA	Transportation	Safety	Wildlife Crossings Pilot Program	DoT	Federal Highway Administration	\$ 350,000,000	4 Years	See 23 U.S.C. 120 (default)
IUA	ClimateEnergyEnvironment	Resilience	Working Capital Fund	Dol	Office of the Secretary	\$ 100,000,000	Until Expended	No non-Federal cost share required



LITACORP ANNUAL BUDGET (2022-2023)

10/7/2022	LITACorp DRAFT ANNUAL BUDGET	Comments:
Salaries	350,000.00	Executive Director, Program Manager, and Executive Assistant
Fringe benefits	24,000.00	Healthcare allowance for Program Manager and Executive Assistant
Car Allowance	24,000.00	\$1,000 monthly allowance for vehicle, vehicle allowance, and tires for both the Executive Director and Program Manager
Cell phone	3,600.00	\$100 per month for cell phone for Executive Director, Program Manager, and Executive Assistant
NonProfit Liability Insurance	10,000.00	Liability Insurance for Board and employees
Travel/meetings/conferences	30,000.00	Per Diem, milage, lodging and travel expenses other than vehicle (ie airfare, train, etc.)
Office leases/rent, IT services	24,000.00	\$1,000 Annual lease/rent pd to the Louisiana Police Jury Association for office space and IT services
Logo/PR Materials	30,000.00	Branding material and copies
Accounting services	24,000.00	Contracted Payroll and audit related services
Supplies	10,000.00	Computers, software, and office supplies
Contracted Professional Services	970,400.00	Contracting services for LITACorp, strategic planning, grant writing, and related services.
ADMINISTRATIVE Annual Budget	1,500,000.00	Total funds for annual administration for LITACorp



PROPOSED DRAWDOWN SCHEDULE



Proposed Drawdown Schedule

Technical Assistance Program	
Month of Drawdown	Amount
May 2023	\$1.5 million (<i>complete</i>)
December 2023	\$2 million
December 2024	\$1.5 million
TOTAL	\$5 million

Matching Funds Grant Program	
Month of Drawdown	Amount
November 2023	\$10 million
January 2024	\$10 million
TOTAL	\$20 million



JLCB ADDITIONAL QUESTIONS & ANSWERS



Additional Information Requested by JLCB

Which organizations submitted proposals to the RFP to support LITACorp's Technical Assistance Program?

- Franklin Associates, LLC (*on contract*)
- Hunt, Guillot & Associates (*on contract*)
- Acadiana Planning Commission (*declined*)
- CohnReznick (*declined*)
- South Central Planning & Development Commission (*declined*)

Is LITACorp pursuing additional funding to supplement appropriated funds?

At this time, LITACorp is not pursuing additional funding to supplement appropriated funds. However, there are philanthropic organizations interested in supporting LITACorp's Technical Assistance Program. There is also an opportunity for LITACorp to apply for federal funding in the future to expand the Technical Assistance Program but no applications have been submitted at this time, and the organization is only using state appropriated dollars to operate.

Is LITACorp using any funds for lobbying activities?

No, LITACorp is not using any funds for lobbying activities.

Agenda Item #5

Review and approval of
Insure Louisiana
Incentive Program grant
awards



LOUISIANA DEPARTMENT OF INSURANCE

JAMES J. DONELON

COMMISSIONER

November 29, 2023

Honorable Jerome Zeringue
Joint Legislative Committee on the Budget
P. O. Box 44294
Baton Rouge, LA 70804

Dear Mr. Zeringue:

Please accept this letter as a request for the Department of Insurance to be placed on the agenda for the December 14, 2023 meeting of the Joint Legislative Committee on the Budget for the review and approval of the Round 2 disbursement of grant funds for the Insure Louisiana Incentive Program in accordance with Act 754 of the 2022 Regular Session.

The following six (6) companies have applied for grants totaling \$11,675,000 of the \$13,150,000 available:

- Allied Trust Insurance Company - \$425,000
- Cajun Underwriters Reciprocal Exchange - \$1,750,000
- Elevate Reciprocal Exchange - \$2,000,000
- Lilypad Insurance Company - \$2,000,000
- Safepoint Insurance Company - \$1,500,000
- SafePort Insurance Company - \$4,000,000

Your consideration of this request is greatly appreciated. Please contact me at (225)342-3981 if you have any questions or if you need any additional information.

Sincerely,

Lance L. Herrin
Deputy Commissioner
Office of Management & Finance

LLH/sck

Insure Louisiana Incentive Program (2nd Round)

Joint Legislative Committee on the Budget (JLCB) Summary

	Applicant Name	State of Domicile	Capital & Surplus ¹	Financial Strength Rating	Risk-Based Capital Ratio ²	Net Premium-to-Surplus ¹	%Surplus Any One Risk ¹	Gross Premium-to-Surplus ¹	1 st Round Grant Amount Received	2 nd Round Grant Amount Requested	Proposed 2 nd Round Grant Amount	Comments
1	Allied Trust Ins Co	TX	\$ 41,164,714	A (Demotech)	883%	(0.6)	0.5%	5.2	\$ 6,500,000	\$ 425,000	\$ 425,000	
2	Cajun Underwriters Reciprocal Exchange	LA	\$ 24,492,924	A (Demotech)	841%	0.5	2.4%	4.1	\$ 3,000,000	3,750,000	1,750,000	Grant amount limited under La. R.S. 22:2365(B), which requires the aggregate grants received to be less than 20% of an insurers capital & surplus.
3	Elevate Reciprocal Exchange	TX	\$ 34,075,777	A (Demotech)	9950%	0.1	4.8%	0.9	\$ 3,750,000	4,250,000	2,000,000	Grant amount limited under La. R.S. 22:2365(B), which requires the aggregate grants received to be less than 20% of an insurers capital & surplus.
4	Lilypad Insurance Company Inc.	LA	\$ 10,000,000	TBD ³	TBD ⁴	0.0	0.0%	0.0	-	6,000,000	2,000,000	Applicant simultaneously filed an application to become licensed as a Louisiana Reciprocal Insurer.
5	Safepoint Ins Co	FL	\$ 52,744,607	A (Demotech)	623%	(1.2)	0.9%	5.6	\$ 8,500,000	1,500,000	1,500,000	
6	SafePort Ins Co	FL	\$ 76,581,563	A- (AM Best)	1160%	0.3	2.6%	1.8	\$ 2,000,000	4,000,000	4,000,000	
Totals									\$ 23,750,000	\$ 19,925,000	\$ 11,675,000	

¹ - As of September 30, 2023

² - Quarterly estimate, as this ratio is only computed on an Annual basis.

³ - The Applicant is unable to obtain a rating prior to Louisiana's Certificate of Authority approval.

⁴ - The Applicant has yet to commence business and therefore has no risks in which an RBC ratio can be calculated.

Insure Louisiana Incentive Program Quarterly Report (Q3-2023)

Report to the Legislature



Louisiana Department of Insurance

James J. Donelon, Commissioner

LOUISIANA DEPARTMENT OF INSURANCE

This public document was published at a total cost of \$.90. One copy of this public document was published in this first printing at a total cost of \$.90. The total cost of all printings of this document including reprints is \$.90. This document was published by the Louisiana Department of Insurance, P.O. Box 94214, Baton Rouge, LA 70804 to report in response to ACT 1 of the 2023 First Extraordinary Session of the Louisiana Legislature under authority of the Division of Administration. This material was printed in accordance with standards for printing by State Agencies established in R.S. 43:31.



LOUISIANA DEPARTMENT OF INSURANCE

JAMES J. DONELON
COMMISSIONER

December 7, 2023

The Honorable Patrick Page Cortez
President, Louisiana State Senate
P.O. Box 94183
Baton Rouge, LA 70804
pcortez@legis.la.gov

The Honorable Clay Schexnayder
Speaker, Louisiana House of Representatives
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The Honorable Mack "Bodi" White
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The Honorable Kirk Talbot
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The Honorable Mike Huval
Chairman of the House Insurance Committee
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mhuval@legis.la.gov

RE: Insure Louisiana Incentive Program
Quarterly Report "as of" September 30, 2023

Dear President Cortez, Speaker Schexnayder, Chairman White, Chairman Talbot, Chairman Zeringue, and Chairman Huval:

Act No. 1 of the 2023 First Extraordinary Session provided that the commissioner submit quarterly reports on the Insure Louisiana Incentive Program ("Program") to the Legislature, the House Committee on Appropriations, the Senate Committee on Finance, and the House and Senate committees on insurance containing information for the preceding quarter detailing the following for grantees receiving grants from funds appropriated therein:

- the amount of premiums written, by parish and by grantee, pursuant to the Program (**Attachment 1**);
- the amount of premiums, by parish and by grantee, for property located in the parishes included in the federal Gulf Opportunity Zone Act of 2005 (**Attachment 2**);

- the amount of premiums, by parish and by grantee, removed from the Louisiana Citizens Property Insurance Corporation (**Attachment 3**);
- the total amount of premiums for each grantee, by parish, inclusive of premiums written pursuant to the Program (**Attachment 4**);
- premium to surplus ratio, net of reinsurance (**Attachment 5**);
- gross premium to surplus ratio (**Attachment 6**);
- detail on the catastrophe reinsurance program maintained by the grantee, including retentions, limits, reinstatements and Probable Maximum Loss (“PML”) models for at least five different scenarios (**Attachment 7**); and
- the current rating of the grantee (**Attachment 8**).

All information provided herewith has been compiled from quarterly reports received from each grantee and is unaudited.

This report excludes Constitution Insurance Company, which while approved to receive grant funds had not fully completed the requirements necessary to write homeowners’ business in Louisiana. As a result, the LDI stopped payment of the grant funds check.

If you need any additional information, please do not hesitate to contact me.

Sincerely,



Stewart Guerin
Deputy Commissioner
Office of Financial Solvency

Attachments

cc: Jim Donelon
Adam Patrick

**Insure Louisiana Incentive Program
Incentive Premium - By Parish
3rd Quarter 2023**

Parish	Allied Trust	Cajun						Total
		Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice	
Acadia*	41,477	54,676	37,010	163,780	140,113	3,855	206,367	647,278
Allen*	2,537	10,936	8,272	18,098	-	341	19,428	59,612
Ascension*	250,329	753,628	47,410	307,232	62,917	54,349	372,217	1,848,082
Assumption*	49,935	56,287	7,367	269,200	47,007	12,327	56,195	498,318
Avoyelles	-	6,957	1,452	-	4,904	2,042	23,918	39,273
Beauregard*	10,265	44,190	40,145	2,291	3,184	9,766	68,853	178,694
Bienville	-	-	-	-	-	-	-	-
Bossier	8,635	4,088	8,239	-	-	13,642	17,630	52,234
Caddo	7,123	6,488	21,131	-	-	13,813	60,265	108,820
Calcasieu*	468,129	248,371	713,828	151,601	1,166,351	130,457	1,772,658	4,651,395
Caldwell	2,663	-	-	-	-	-	2,079	4,742
Cameron*	196,857	212,201	152,911	3,379	53,933	49,368	298,612	967,261
Catahoula	1,876	-	-	-	-	-	-	1,876
Claiborne	-	-	-	-	-	-	1,567	1,567
Concordia	-	-	4,094	-	-	-	3,062	7,156
DeSoto	-	737	2,330	-	-	-	-	3,067
East Baton Rouge*	574,547	1,140,114	99,237	1,414,038	529,837	176,674	822,586	4,757,033
East Carroll	-	-	1,992	-	-	-	-	1,992
East Feliciana*	9,275	11,923	221	32,276	3,262	2,438	14,926	74,321
Evangeline*	-	2,674	6,005	27,488	3,661	2,314	32,954	75,096
Franklin	-	-	-	-	-	-	4,488	4,488
Grant	-	2,975	4,179	-	748	939	15,057	23,898
Iberia*	69,325	321,869	111,575	439,513	1,281,294	147,645	531,092	2,902,313
Iberville*	8,717	45,342	12,421	69,986	35,207	4,407	43,275	219,355
Jackson	742	827	614	-	-	-	-	2,183
Jefferson*	3,343,745	3,631,959	282,271	1,738,706	8,201,739	54,361	5,184,973	22,437,754
Jefferson Davis*	40,161	37,092	95,259	24,882	58,816	8,318	119,222	383,750
Lafayette*	326,217	628,738	255,779	779,130	793,186	123,765	1,708,838	4,615,653
Lafourche*	1,362,072	1,611,779	18,056	509,192	653,397	275,435	481,311	4,911,242
LaSalle	355	1,430	-	-	-	1,607	4,632	8,024
Lincoln	-	-	3,135	-	-	7,169	5,056	15,360
Livingston*	167,944	920,761	47,600	524,904	70,572	36,969	267,635	2,036,385
Madison	-	-	-	-	-	-	-	-
Morehouse	-	-	1,802	-	-	-	1,373	3,175
Natchitoches	1,440	2,777	-	-	-	254	9,814	14,285
Orleans*	2,044,719	2,087,180	195,088	935,344	2,813,273	28,234	3,323,514	11,427,352
Ouachita	6,858	2,142	9,928	-	-	13,233	41,850	74,011
Plaquemines*	366,699	728,466	154	6,986	96,707	5,201	-	1,204,213
Pointe Coupee*	7,483	27,116	-	28,008	7,434	4,007	31,655	105,703
Rapides	3,674	27,709	38,012	-	10,189	15,396	96,454	191,434
Red River	-	-	-	-	-	361	-	361
Richland	-	-	-	-	-	-	2,257	2,257
Sabine*	5,851	2,861	3,604	-	1,574	4,024	6,930	24,844
Saint Bernard*	774,427	1,358,369	20,041	47,528	249,795	3,169	505,650	2,958,979
Saint Charles*	1,080,175	703,822	118,824	933,502	948,727	228,489	1,642,825	5,656,364
Saint Helena*	4,349	26,585	-	16,125	10,144	1,377	6,092	64,672
Saint James*	85,563	190,833	3,841	194,135	54,151	17,359	210,422	756,304
Saint John the Baptist*	454,881	479,761	81,392	611,495	569,296	282,528	1,213,713	3,693,066
Saint Landry*	2,846	49,070	22,262	108,564	82,005	-	64,881	329,628
Saint Martin*	17,945	72,750	46,500	69,276	221,409	28,738	198,170	654,788
Saint Mary*	93,645	206,765	18,449	352,135	1,957,527	448,894	301,194	3,378,609
Saint Tammany*	2,133,113	1,657,636	113,890	604,161	1,835,459	37,245	1,989,354	8,370,858
Tangipahoa*	232,663	877,923	45,925	383,469	280,931	67,744	301,071	2,189,726
Tensas	-	-	-	-	-	-	-	-
Terrebonne*	1,036,049	1,859,919	14,562	1,034,226	2,452,644	2,393,817	934,248	9,725,465
Union	-	-	-	-	-	-	1,823	1,823
Vermilion*	195,861	497,332	204,677	257,098	1,575,115	266,543	518,337	3,514,963
Vernon*	4,384	19,011	15,486	-	-	9,661	19,936	68,478
Washington*	27,569	82,586	11,920	52,534	27,376	12,938	56,565	271,488
Webster	-	-	1,473	-	-	2,583	8,343	12,399
West Baton Rouge*	33,052	99,965	9,748	56,363	5,525	9,021	38,777	252,451
West Carroll	-	-	2,446	-	-	-	-	2,446
West Feliciana*	-	15,854	2,120	3,907	-	-	15,640	37,521
Winn	1,950	-	2,518	-	-	2,180	2,102	8,750
TOTAL - All Parishes	15,558,122	20,832,474	2,967,195	12,170,552	26,309,409	5,014,997	23,681,886	106,534,635

* GO Zone Parish

All amounts are in whole dollars/numbers.

Cumulative, April through September 2023.

**Insure Louisiana Incentive Program
Incentive Premium - GO Zone Parishes
3rd Quarter 2023**

Parish	Allied Trust	Cajun Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice		Total
Acadia*	41,477	54,676	37,010	163,780	140,113	3,855	206,367		647,278
Allen*	2,537	10,936	8,272	18,098	-	341	19,428		59,612
Ascension*	250,329	753,628	47,410	307,232	62,917	54,349	372,217		1,848,082
Assumption*	49,935	56,287	7,367	269,200	47,007	12,327	56,195		498,318
Beauregard*	10,265	44,190	40,145	2,291	3,184	9,766	68,853		178,694
Calcasieu*	468,129	248,371	713,828	151,601	1,166,351	130,457	1,772,658		4,651,395
Cameron*	196,857	212,201	152,911	3,379	53,933	49,368	298,612		967,261
East Baton Rouge*	574,547	1,140,114	99,237	1,414,038	529,837	176,674	822,586		4,757,033
East Feliciana*	9,275	11,923	221	32,276	3,262	2,438	14,926		74,321
Evangeline*	-	2,674	6,005	27,488	3,661	2,314	32,954		75,096
Iberia*	69,325	321,869	111,575	439,513	1,281,294	147,645	531,092		2,902,313
Iberville*	8,717	45,342	12,421	69,986	35,207	4,407	43,275		219,355
Jefferson*	3,343,745	3,631,959	282,271	1,738,706	8,201,739	54,361	5,184,973		22,437,754
Jefferson Davis*	40,161	37,092	95,259	24,882	58,816	8,318	119,222		383,750
Lafayette*	326,217	628,738	255,779	779,130	793,186	123,765	1,708,838		4,615,653
Lafourche*	1,362,072	1,611,779	18,056	509,192	653,397	275,435	481,311		4,911,242
Livingston*	167,944	920,761	47,600	524,904	70,572	36,969	267,635		2,036,385
Orleans*	2,044,719	2,087,180	195,088	935,344	2,813,273	28,234	3,323,514		11,427,352
Plaquemines*	366,699	728,466	154	6,986	96,707	5,201	-		1,204,213
Pointe Coupee*	7,483	27,116	-	28,008	7,434	4,007	31,655		105,703
Sabine*	5,851	2,861	3,604	-	1,574	4,024	6,930		24,844
Saint Bernard*	774,427	1,358,369	20,041	47,528	249,795	3,169	505,650		2,958,979
Saint Charles*	1,080,175	703,822	118,824	933,502	948,727	228,489	1,642,825		5,656,364
Saint Helena*	4,349	26,585	-	16,125	10,144	1,377	6,092		64,672
Saint James*	85,563	190,833	3,841	194,135	54,151	17,359	210,422		756,304
Saint John the Baptist*	454,881	479,761	81,392	611,495	569,296	282,528	1,213,713		3,693,066
Saint Landry*	2,846	49,070	22,262	108,564	82,005	-	64,881		329,628
Saint Martin*	17,945	72,750	46,500	69,276	221,409	28,738	198,170		654,788
Saint Mary*	93,645	206,765	18,449	352,135	1,957,527	448,894	301,194		3,378,609
Saint Tammany*	2,133,113	1,657,636	113,890	604,161	1,835,459	37,245	1,989,354		8,370,858
Tangipahoa*	232,663	877,923	45,925	383,469	280,931	67,744	301,071		2,189,726
Terrebonne*	1,036,049	1,859,919	14,562	1,034,226	2,452,644	2,393,817	934,248		9,725,465
Vermilion*	195,861	497,332	204,677	257,098	1,575,115	266,543	518,337		3,514,963
Vernon*	4,384	19,011	15,486	-	-	9,661	19,936		68,478
Washington*	27,569	82,586	11,920	52,534	27,376	12,938	56,565		271,488
West Baton Rouge*	33,052	99,965	9,748	56,363	5,525	9,021	38,777		252,451
West Feliciana*	-	15,854	2,120	3,907	-	-	15,640		37,521
TOTAL - GO Zone Parishes	15,522,806	20,776,344	2,863,850	12,170,552	26,293,568	4,941,778	23,380,116		105,949,014

* GO Zone Parish

All amounts are in whole dollars/numbers.

Cumulative, April through September 2023.

**Insure Louisiana Incentive Program
Incentive Premium - Citizens Takeout
3rd Quarter 2023**

Parish	Safepoint
Acadia*	68,039
Allen*	0
Ascension*	30,659
Assumption*	47,007
Avoyelles	744
Beauregard*	1,555
Bienville	0
Bossier	0
Caddo	0
Calcasieu*	29,112
Caldwell	0
Cameron*	35,713
Catahoula	0
Claiborne	0
Concordia	0
DeSoto	0
East Baton Rouge*	29,054
East Carroll	0
East Feliciana*	0
Evangeline*	0
Franklin	0
Grant	0
Iberia*	131,483
Iberville*	0
Jackson	0
Jefferson*	8,201,739
Jefferson Davis*	17,398
Lafayette*	184,517
Lafourche*	653,397
LaSalle	0
Lincoln	0
Livingston*	28,865
Madison	0
Morehouse	0
Natchitoches	0
Orleans*	2,787,153
Ouachita	0
Plaquemines*	96,707
Pointe Coupee*	2,490
Rapides	0
Red River	0
Richland	0
Sabine*	0
Saint Bernard*	249,795
Saint Charles*	948,727
Saint Helena*	0
Saint James*	54,151
Saint John the Baptist*	566,616
Saint Landry*	1,832
Saint Martin*	117,652
Saint Mary*	245,603
Saint Tammany*	1,818,092
Tangipahoa*	58,943
Tensas	0
Terrebonne*	2,445,004
Union	0
Vermilion*	512,174
Vernon*	0
Washington*	8,970
Webster	0
West Baton Rouge*	0
West Carroll	0
West Feliciana*	0
Winn	0
TOTAL - All parishes	19,373,191

* GO Zone Parish

All amounts are in whole dollars/numbers.

Cumulative, April through September 2023.

Insure Louisiana Incentive Program
Total Premium - By Parish (Includes Both Incentive and Non-Incentive Premium)
3rd Quarter 2023

Parish	Allied Trust	Cajun						Total
		Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice	
Acadia*	119,816	63,540	37,010	163,780	411,908	3,855	175,135	975,044
Allen*	8,272	10,936	8,272	18,098	107,515	555	19,012	172,660
Ascension*	1,248,019	968,870	47,410	307,232	1,789,405	46,417	342,838	4,750,191
Assumption*	168,647	56,287	7,367	271,793	240,214	12,327	38,594	795,229
Avoyelles	3,027	21,380	1,452	-	111,501	2,042	22,267	161,669
Beauregard*	78,836	55,470	40,145	2,291	167,313	9,766	44,170	397,991
Bienville	2,889	-	-	-	17,287	-	105	20,281
Bossier	540,269	9,895	8,239	-	283,866	12,487	21,614	876,370
Caddo	581,729	28,067	21,131	-	495,171	10,944	69,582	1,206,624
Calcasieu*	2,021,226	320,069	713,828	151,601	2,408,104	122,613	1,608,572	7,346,013
Caldwell	2,663	2,178	-	-	3,695	-	2,176	10,712
Cameron*	353,477	212,201	152,911	3,379	209,030	49,368	272,285	1,252,651
Catahoula	1,876	-	-	-	53,657	-	50	55,583
Claiborne	5,022	-	-	-	13,117	-	1,710	19,849
Concordia	6,749	1,497	4,094	-	31,744	-	3,250	47,334
DeSoto	39,110	10,758	2,330	-	48,140	-	656	100,994
East Baton Rouge*	2,459,211	2,275,633	99,237	1,414,038	3,474,787	171,810	725,865	10,620,581
East Carroll	2,717	-	1,992	-	1,725	-	110	6,544
East Feliciana*	25,426	41,963	221	32,276	95,874	2,438	11,656	209,854
Evangeline*	6,966	5,536	6,005	27,488	101,415	2,314	27,878	177,602
Franklin	-	-	-	-	54,172	-	4,582	58,754
Grant	9,667	9,824	4,179	-	103,215	939	15,583	143,407
Iberia*	321,770	331,683	111,575	452,970	2,278,532	144,171	455,559	4,096,260
Iberville*	77,849	101,776	12,421	69,986	193,738	334	40,406	496,510
Jackson	12,955	827	614	-	10,929	-	290	25,615
Jefferson*	11,877,186	15,009,438	282,271	2,077,264	14,635,718	54,361	4,315,991	48,252,229
Jefferson Davis*	97,658	49,498	95,259	24,882	253,716	5,362	99,415	625,790
Lafayette*	1,518,924	702,703	255,779	780,584	2,867,183	111,642	1,476,927	7,713,742
Lafourche*	2,844,336	1,624,397	18,056	509,192	3,145,006	274,446	430,412	8,845,845
LaSalle	8,671	19,249	-	-	33,744	1,607	4,770	68,041
Lincoln	21,810	4,315	3,135	-	19,042	7,169	5,774	61,245
Livingston*	1,129,783	1,366,569	47,600	526,157	2,145,795	35,967	236,928	5,488,799
Madison	2,596	-	-	-	6,970	-	-	9,566
Morehouse	23,248	5,226	1,802	-	29,670	-	1,399	61,345
Natchitoches	18,048	4,140	-	-	86,191	254	10,511	119,144
Orleans*	5,080,421	16,796,610	195,088	1,080,822	10,808,087	28,214	2,689,369	36,678,611
Ouachita	265,763	25,453	9,928	-	168,071	6,633	45,760	521,608
Plaquemines*	1,199,662	728,466	154	15,585	867,227	5,201	1,131	2,817,426
Pointe Coupee*	47,416	55,590	-	28,008	103,227	4,007	31,342	269,590
Rapides	55,491	52,208	38,012	-	464,917	15,396	96,227	722,251
Red River	9,248	-	-	-	11,190	361	(1,738)	19,061
Richland	11,879	2,773	-	-	41,229	-	2,590	58,471
Sabine*	16,458	2,861	3,604	-	31,986	4,024	7,572	66,505
Saint Bernard*	1,937,465	5,021,017	20,041	92,265	1,257,166	2,847	468,067	8,798,868
Saint Charles*	3,163,277	1,913,722	118,824	938,411	1,760,283	227,959	1,552,315	9,674,791
Saint Helena*	15,220	45,510	-	16,125	51,958	1,377	5,871	136,061
Saint James*	178,190	265,994	3,841	194,135	179,019	17,359	199,696	1,038,234
Saint John the Baptist*	2,114,727	1,048,425	81,392	611,495	1,628,858	268,902	1,180,890	6,934,689
Saint Landry*	104,076	79,570	22,262	110,188	332,995	-	60,801	709,892
Saint Martin*	137,393	88,330	46,500	69,276	605,866	26,744	177,871	1,151,980
Saint Mary*	232,064	206,765	18,449	352,135	3,015,154	441,521	254,290	4,520,378
Saint Tammany*	13,996,947	6,199,795	113,890	946,306	5,927,636	28,332	1,667,548	28,880,454
Tangipahoa*	1,211,460	1,719,036	45,925	385,339	2,398,799	67,936	286,757	6,115,252
Tensas	2,500	-	-	-	5,202	1,447	115	9,264
Terrebonne*	2,827,598	1,884,216	14,562	1,035,440	4,978,241	2,394,081	861,750	13,995,888
Union	-	5,811	-	-	27,624	-	1,865	35,300
Vermilion*	861,504	494,165	204,677	260,376	2,953,792	261,478	475,812	5,511,804
Vernon*	47,200	26,051	15,486	-	140,949	9,661	16,203	255,550
Washington*	99,387	179,570	11,920	52,534	299,865	8,432	53,053	704,761
Webster	13,994	1,854	1,473	-	31,381	2,583	9,048	60,333
West Baton Rouge*	114,460	156,315	9,748	56,363	500,807	9,021	36,166	882,880
West Carroll	-	-	2,446	-	24,207	-	79	26,732
West Feliciana*	3,209	19,928	2,120	3,907	53,149	-	15,296	97,609
Winn	6,172	-	2,518	-	13,330	2,180	2,522	26,722
TOTAL - All Parishes	59,393,629	60,333,960	2,967,195	13,081,721	74,611,304	4,918,884	20,684,340	235,991,033

* GO Zone Parish

All amounts are in whole dollars/numbers.

Cumulative, April through September 2023.

**Insure Louisiana Incentive Program
Premium to Surplus Ratio, Net of Reinsurance
3rd Quarter 2023**

Allied Trust	Cajun Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice
-71%	46%	7%	-22%	-124%	33%	-85%

**Insure Louisiana Incentive Program
Gross Premium to Surplus Ratio
3rd Quarter 2023**

Allied Trust	Cajun Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice
500%	407%	85%	399%	561%	181%	510%

**Insure Louisiana Incentive Program
Reinsurance Summary (1st Event)
3rd Quarter 2023**

Attachment 7

	Allied Trust	Cajun Underwriters	Elevate¹	Gulf States	Safepoint	SafePort	SureChoice¹
Retention	\$ 480,000	\$ 1,500,000	\$ 15,000,000	\$ 2,000,000	\$ 2,000,000	\$ 5,000,000	\$ 15,000,000
Limits	\$ 335,000,000	\$ 277,000,000	\$ 880,000,000	\$ 290,000,000	\$618,000,000	\$ 330,000,000	\$ 880,000,000
Reinstatements ²	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1 in 50 PML ³	\$ 180,203,000	\$ 110,653,000	\$ 14,992,000	\$ 140,364,000	\$294,574,000	\$ 144,312,000	\$ 428,365,000
1 in 100 PML ³	\$ 293,059,000	\$ 212,612,000	\$ 23,709,000	\$ 243,761,000	\$440,945,000	\$ 218,979,000	\$ 730,852,000
1 in 150 PML ³	\$ 378,187,000	\$ 288,433,000	\$ 33,812,000	\$ 314,325,000	\$546,141,000	\$ 271,346,000	\$ 910,141,000
1 in 200 PML ³	\$ 438,273,000	\$ 378,237,000	\$ 41,182,000	\$ 366,166,000	\$618,571,000	\$ 312,551,000	\$ 1,093,369,000
1 in 250 PML ³	\$ 494,449,000	\$ 431,971,000	\$ 45,293,000	\$ 409,342,000	\$663,486,000	\$ 351,172,000	\$ 1,251,496,000

¹ Combined reinsurance program amongst these two affiliated insurance companies

² Includes 2nd Event cover

³ Gross; on a Nationwide basis

**Insure Louisiana Incentive Program
Current Rating of the Grantee
3rd Quarter 2023**

Allied Trust	Cajun Underwriters	Elevate	Gulf States	Safepoint	SafePort	SureChoice
A	A	A	A	A	A-	A
Demotech	Demotech	Demotech	Demotech	Demotech	AM Best	Demotech

Agenda Item #6

Review and approval of
Water Sector
Commission
recommendations

Water Sector Commission 12/14/2023

Requests for Additional Funding				
2	LAWSP10786	Brusly	Sewer	Brusly requests \$1,599,823 additional WSP funds (58% grant increase). This would reduce the match commitment from 31% to 20%. If the WSC doesn't approve this amount, Brusly would like a scope change with value engineering and request \$662,823 additional funds (24% grant increase). This would reduce match commitment from 31% to 22%. Brusly is requesting to waive the match commitment related to the additional funds.
1	LAWSP10218	Lafayette Utilities System	Sewer	Request for additional funding amount of \$113,000. Grant match amount is 76%. Additional match funding contributed to projects increases match % to 107. This would be an increase of 6.14% of the grant amount. Revised grant amount would be \$1,954,063.
1	LAWSP10335	Lafayette Utilities System	Water	Request for additional funding amount of \$467,000. Grant match amount is 76%. Additional match funding contributed to projects increases match % to 92.9. This would be an increase of 10% of the grant amount. Revised grant amount would be \$5,136,867.
2a	LAWSP10846	Morganza	Sewer	Request for additional funding of \$210,000. Grant for \$806,000 was approved including a waiver of the match requirement. Morganza is requesting the amount equal to the match funds.
1	LAWSP10527	Tensas Water Distribution Association	Water	Request for additional funding of \$2,000,000. Match requirement was waived on grant award. Increase of 20%. Original grant amount is \$10,000,000. Revised grant amount would be \$12,000,000.



Town of Brusly

P.O. Box 510 • 601 S. Vaughan
Brusly, LA 70719-0510

MAYOR
Scot Rhodes

COUNCIL MEMBERS
Shane Andre'
Joanne Bourgeois
Donald Neisler
Rusty Daigle
Blake Tassin

To: Traci Watts, Director
Office of Community Development – Local Government Assistance (OCD-LGA)
PO Box 94095
Baton Rouge, LA 70804

Re: Consideration of Additional Funding Requests Water Sector Program

The Town of Brusly is a relatively small town located on the west bank of the Mississippi River and south of I-10 in West Baton Rouge Parish. We have a total population of around 2,600 residents. Over the years, we have had numerous sewer compliance issues with our state sewer discharge permit. Several sewer pump stations experience overflows during heavy rain events and our aging existing sewer lagoon system have numerous issues of noncompliance. With much appreciation, we were selected in January 2023 to receive a Water Sector Program (WSP) grant to provide financial assistance to improve our sewer system to solve all our noncompliance issues.

The total estimated cost of construction in 2022 prior to the design of the project was \$3,087,150. After reviewing our financial position, we were able to commit to a 31.01% match if WSP would contribute the remaining 68.99%. This comes out to us committing \$855,000 in Town NEU/local funds and WSP contributing \$2,756,966. Our portion covers a portion of the construction costs and all the engineering and professional fees. For us, without this grant this entire project would not be financially feasible.

In October 2023 we took bids on one portion of the project and in November 2023 we took bids for the remaining portion. The total project amount after receiving competitive bids totaled \$4,686,973. Comparing the bid amount to the 2022 project estimate in which the grant amount was based upon creates a project shortfall of \$1,599,823. Without further financial assistance, we are unable to make up for this shortfall and complete these necessary improvements to bring our sewer system back into compliance.

If the Water Sector Commission is willing and able, the Town of Brusly is kindly requesting the grant amount that was so graciously provided to us to be increased by \$1,599,823 to cover the financial shortfall. We understand this is an increase of 58% in grant funds, but without this additional funding, we fear we may not ever be able to perform these much-needed improvements and unfortunately will consistently be burdened with these failures to meet our sewer permit limits in the future.

(225) 749-2909 or (225) 749-2267 • Fax (225) 749-3874
www.bruslyla.com

The Town of Brusly is an Equal Opportunity Employer and Provider of Services



Town of Brusly

P.O. Box 510 • 601 S. Vaughan
Brusly, LA 70719-0510

MAYOR
Scot Rhodes

COUNCIL MEMBERS
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Donald Neisler
Rusty Daigle
Blake Tassin

We had our engineer perform a value engineering process on the project to determine if any portions of the project can be modified to reduce project costs while maintaining compliance with all design requirements, codes, and standards. Through value engineering and a scope reduction, it was determined that \$937,000 could be reduced from the overall project amount without sacrificing project effectiveness. This would still leave a budget shortfall of \$662,823. Should the Commission not be able to provide us with the entire \$1,599,823 in assistance, we would then appreciate the consideration of an additional \$662,823 to be provided by the Commission. We feel that should this \$662,823 additional grant money be provided; this would alleviate our financial shortfall allowing us to proceed with this project without altering the project effectiveness while allowing the project to still meet all federal and state standards and codes.

Sincerely,

A handwritten signature in blue ink, appearing to read "Scot Rhodes", with a long, sweeping underline.

Scot Rhodes

Mayor

Town of Brusly

(225) 749-2909 or (225) 749-2267 • Fax (225) 749-3874

www.bruslyla.com

The Town of Brusly is an Equal Opportunity Employer and Provider of Services

SENT VIA EMAIL ONLY

November 14, 2023

Ms. Traci Watts
Director, Local Government Assistance
Office of Community Development
State of Louisiana Division of Administration
P.O. Box 94095
Baton Rouge, LA 70804-9095

RE: ARPA WSP Additional Funding Request
LAWSP10335
Lafayette Utilities System

Dear Ms. Watts:

Lafayette Utilities System (LUS), the utilities department within the Lafayette City-Parish Consolidated Government (LCPCG), herewith requests additional funding for our subject Water Sector Program (WSP) grant. Specifically, this request is for \$467,000.00, which is about 10% of the original grant amount of \$4,669,866.00

Public bids were received on 11/2/23 for Project #10 – Ground Storage Tank at South Water Treatment Plant. As shown on the attached tabulation, the lowest bid is \$4,697,000.00, which is substantially higher than the cost estimate of \$2,354,000. As per the engineer's memo attached, a value engineering process was completed, but it was determined that the project could not be cut back further without hindering the project as a whole.

Therefore, additional funding of \$467,000 is requested to assist in awarding the project to the lowest bidder. By prioritizing projects and utilizing available funds, LUS intends to fund the balance of the deficit amount. That would result in a project cost allocation breakdown of \$1,879,400 for WSP and \$2,817,600 for LUS.

ARPA WSP Additional Funding Request
November 14, 2023
Page 2

The project is important and needed; therefore, we wish for approval of this request. If you have any questions or need additional information, please contact me.

Sincerely,



Joshua S. Guillory
Lafayette Mayor-President

/bg

Attachments

xc: Bryan Guidry
Trevor Carriere
Craig Gautreaux
Alison Alleman
Karen Hoyt
Jeffrey B. Stewart
Chris Richard, DSA Engineers



Improving the way you live

SENT VIA EMAIL ONLY

November 14, 2023

Ms. Traci Watts
Director, Local Government Assistance
Office of Community Development
State of Louisiana Division of Administration
P.O. Box 94095
Baton Rouge, LA 70804-9095

RE: Request for Additional Funding – SWTP Ground Storage Tank
LAWSP10335
Lafayette Utilities System

Dear Ms. Watts:

Lafayette City-Parish Consolidated Government / Lafayette Utilities System (LUS) is requesting that the Water Sector Commission consider approving additional funding for LAWSP10335 – Project #10 – Ground Storage Tank at SWTP. Public bids were received, and were substantially higher than the original cost estimates (attached is a tabulation of bids).

Part of the original value engineering process for bidding this project was to use a technique of putting parts of the project into bid alternates that gives the opportunity to take the base bid or the base bid plus the alternate. A second value engineering process was completed subsequently to the bid openings. After an in-depth look, it was determined that the project could not be cut back further without hindering the project as a whole.

In order to reduce the scope to match the current budget, we would have to take the tank construction out of the project which would negate the intent of the project. The project is important to LUS and needed, which was very evident this summer during the drought conditions with high demands.

The original estimated cost for the project is \$2,354,000.00 (see engineer's estimate breakdown attached). With the current bids received, a new budget of \$4,697,000.00 would be needed with an optional deductive alternate value of \$720,000.00. This equates to additional funding in the amount of \$2,343,000.00 needed to ensure the intent of the project is addressed.

Request for Additional Funding – SWTP Ground Storage Tank
November 14, 2023
Page 2

In order to award the project to the lowest bidder, LUS is requesting additional funding in the amount of \$467,000.00, which is about 10% of the original grant amount of \$4,669,866.00. LUS intends to fund the balance of the deficit amount (\$1,876,000.00) by prioritizing projects and utilizing funds available. That would result in a project cost breakdown of \$1,879,400 for WSP and \$2,817,600 for LUS.

The project will be constructed under the supervision of licensed engineers who will ensure the project meets all federal, state, and local applicable standards and codes.

Sincerely,



Trevor J. Carriere, PE
Civil Engineer III
Lafayette Utilities System

Attachments

xc: Bryan Guidry
Craig Gautreaux
Alison Alleman
Karen Hoyt
Jeffrey B. Stewart
Chris Richard, DSA Engineers

ENGINEER'S COST ESTIMATE: SWTP Ground Storage Tank (2 million gallons)

CONSTRUCTION

Item No.	Description	Unit	Quantity	Unit Price	Total
1	Construct Tank	Gal	2,000,000	0.90	\$ 1,800,000
2	Piping and Mechanical	Lump	1	80,000	\$ 80,000
3	Electrical and Controls	Lump	1	50,000	\$ 50,000
4	Foundation	Lump	1	60,000	\$ 60,000
5	Mobilization of crews & equipment	Lump	1	150,000	\$ 150,000

Subtotal: \$ 2,140,000

Contingencies: \$214,000

Estimated Cost (Construction): \$2,354,000

ENGINEERING:

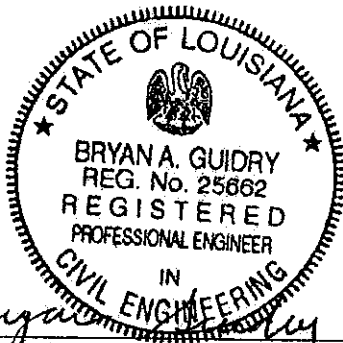
Basic Services: \$172,713

Resident Project Representative: \$25,000

Additional Service (surveying, staking, servitudes): \$5,000

Testing: \$15,000

TOTAL ENGINEERING COST: \$217,713



Bryan A. Guidry

Stamp and Signature of
Licensed Architect/Engineer
Bryan Guidry, P.E.

10/12/21

Date

November 10, 2023



102 Asma Boulevard
Suite 305
Lafayette, LA 70508

(337)232-5182

www.dsaengineering.com

Mr. Trevor Carriere
Lafayette Utilities System
Lafayette Consolidated Government
1314 Walker Road
Lafayette, LA 70506

RE: South Water Treatment Plant
Ground Storage Tank & High Service Pumps
for the
Lafayette Utilities System
City of Lafayette, Louisiana
Recommendation to Award
(DSA No. 4934.02)

Dear Trevor:

Bids were received and opened on November 2, 2023 for the referenced project. A bid tab of the bids received is attached.

Providing that funding is available and all bid requirements have been met, we recommend awarding the project to the low bidder, NCMC, LLC of Baton Rouge, Louisiana in the amount of \$4,697,000.00.

Should you have any questions, please do not hesitate to call.

Sincerely,

DOMINGUE, SZABO & ASSOCIATES, INC.

Handwritten signature of Chris Richard in cursive.

Chris Richard, P.E.

Enclosure

CKR/

SENT VIA EMAIL ONLY

November 21, 2023

Ms. Traci Watts
Director, Local Government Assistance
Office of Community Development
State of Louisiana Division of Administration
P.O. Box 94095
Baton Rouge, LA 70804-9095

RE: ARPA WSP Additional Funding Request
LAWSP10218
Lafayette Utilities System

Dear Ms. Watts:

Lafayette Utilities System (LUS), the utilities department within the Lafayette City-Parish Consolidated Government (LCPCG), herewith requests additional funding for our subject Water Sector Program (WSP) grant. Specifically, this request is for \$113,000.00, which is about 6.14% of the original grant amount of \$1,841,063.00

Public bids were received on 10/31/23 for Project #2 – Verot School Road Lift Station Backup Power. As shown on the attached tabulation, the lowest bid is \$289,000.00, which is substantially higher than the cost estimate of \$176,000. As per the engineer's memo attached, a value engineering process was completed, but it was determined that the project could not be cut back without hindering the project as a whole.

Therefore, additional funding of \$113,000 is requested to cover the deficit between the bid and the LUS budgeted funds. The project is located at a large sewer lift station serving a large population and is important to LUS and needed (especially during power outages during hurricanes); therefore, we wish for approval of this request.

ARPA Additional Funding Request – Verot School Road Lift Station Backup Power
November 21, 2023
Page 2

If you have any questions or need additional information, please contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read "Joshua S. Guillory".

Joshua S. Guillory
Lafayette Mayor-President

/bg

Attachments

xc: Bryan Guidry
Brad Eldridge
Craig Gautreaux
Alison Alleman
Karen Hoyt
Jeffrey B. Stewart

CONTRACT # 750-23-076
 ADDENDA ONE
240 CALENDAR DAYS

BID TABULATION FOR VEROT SCHOOL ROAD LIFT STATION GENERATOR

BIDS OPENED ON TUESDAY, OCTOBER 31, 2023 AT 3:00 P.M.

COMPANY	BB/CC	ADD. ACKN.	CONTRACTORS LICENSE NO.	TOTAL BASE BID
A & P ELECTRICAL SERVICE, INC.	BB	YES	29842	\$289,000.00
PREFERRED ELECTRIC, INC.	BB	YES	25666	\$309,075.00
ERNEST P. BREAUX ELECTRICAL, LLC	BB	YES	62810	\$348,800.00



Improving the way you live

SENT VIA EMAIL ONLY

November 21, 2023

Ms. Traci Watts
Director, Local Government Assistance
Office of Community Development
State of Louisiana Division of Administration
P.O. Box 94095
Baton Rouge, LA 70804-9095

RE: Request for Additional Funding – Verot School Road Lift Station Generator
LAWSP10218
Lafayette Utilities System

Dear Ms. Watts:

Lafayette City-Parish Consolidated Government / Lafayette Utilities System (LUS) is requesting that the Water Sector Commission consider approving additional funding for LAWSP10218 – Project #2 – Verot School Road Lift Station Backup Power. Public bids were received, and were substantially higher than the original cost estimates (attached is a tabulation of bids).

A value engineering evaluation to reduce the scope to match the current budget was performed. However, we would have to take the generator out of the project which would negate the intent of the project. The project is located at a large sewer lift station that serves a large population and is important to LUS and needed, which is evident during power outages (especially during hurricanes).

The original estimated cost for the project is \$176,000 (see engineer's estimate breakdown attached). With the current bids received, a new budget of \$289,000 would be needed. This equates to additional funding in the amount of \$113,000 needed to ensure the intent of the project is addressed.

In order to award the project to the lowest bidder, LUS is requesting additional funding in the amount of \$113,000, which is about 6.14% of the original grant amount of \$1,841,063. That would result in a construction cost breakdown of \$215,432 for WSP and \$73,568 for LUS.

Request for Additional Funding – Verot School Road Lift Station Generator
November 21, 2023
Page 2

The project will be constructed under the supervision of licensed engineers who will ensure the project meets all federal, state, and local applicable standards and codes.

Sincerely,



Brad Eldridge, PE
Civil Engineer III
Lafayette Utilities System

Attachments

xc: Bryan Guidry
Craig Gautreaux
Alison Alleman
Karen Hoyt
Jeffrey B. Stewart
Chris Richard, DSA Engineers

ATTACHMENT A

ENGINEER'S COST ESTIMATE: Verot School Road Lift Station Emergency Backup Power

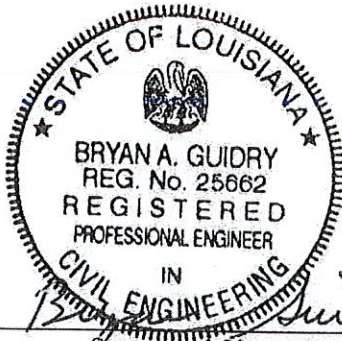
CONSTRUCTION


Item No.	Description	Unit	Quantity	Unit Price	Total
1	Existing Facilities Compatibility	Lump	1	20,000	\$ 20,000
2	Provide and Install Generator	Lump	1	100,000	\$ 100,000
3	Install New Controls	Lump	1	20,000	\$ 20,000
4	Testing and Startup	Lump	1	5,000	\$ 5,000
5	Mobilization of crews & equipment	Lump	1	15,000	\$ 15,000

Subtotal: \$ 160,000
 Contingencies: \$ 16,000
Estimated Cost (Construction): \$ 176,000

ENGINEERING:

Basic Services: \$15,686
 Resident Project Representative: \$5,000
 Additional Service (surveying, staking, servitudes): \$500
 Testing: \$500
TOTAL ENGINEERING COST: \$21,686




 Stamp and Signature of
 Licensed Architect/Engineer
 Bryan Guidry, P.E.

10/11/21

Date



Village of Morganza

PO Box 66, 112 South LA 3050, Morganza, LA 70759
OFFICE 225.694.3655 FAX 225.694.2477 EMAIL villageofmorganza@yahoo.com

MAYOR

Clarence "Woots" Wells

COUNCIL MEMBERS

Julie Langlois
Elton Savoy
Paul Wells

MUNICIPAL CLERK

Elizabeth Dalton

ASSISTANT CLERK

Krista Major

CHIEF OF POLICE

Mark Ramagos

December 7, 2023

Ms. Traci Watts, Director
State of Louisiana
Division of Administration
Office of Community Development
P. O. Box 94095
Baton Rouge, Louisiana 70804-9095

Attention: Ms. Traci Watts, Director

Re: City of Morganza
Water Sector Program - Sewer

Dear Ms. Watts:

It has come to our attention that there is some confusion regarding the waiver of local match for our Water Sector project. The application was submitted for a total Project Budget of \$1,016,000 with a funding allocation of \$806,000 from Water Sector and a \$210,000 Local Match.

During the August 2023 Water Sector Commission Meeting, the Water Sector Commission approved our Round 2 Application and also waived the Local Match of \$210,000.

It was our assumption that the project would be fully funded through the Water Sector program in the amount of \$1,016,000. We have learned that the Water Sector allocation remains \$806,000 with a Local Match of \$0.00.

We cannot fully implement our project with an abbreviated total project budget of \$806,000. We hereby request that the Water Sector allocation be increased by \$210,000 to the original total project budget of \$1,016,000.

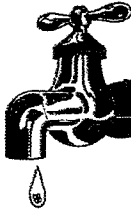
If you have any questions or require any additional information, please feel free to contact my office.

Yours very truly,

VILLAGE OF MORGANZA

Clarence "Woots" Wells, Mayor

CW/rlv



~~TENSAS WATER DISTRIBUTION~~ ASSOCIATION, INC.

P. O. BOX 828 • ST. JOSEPH, LOUISIANA 71366 • 1-318-766-3285

December 1, 2023

*Office of Community Development
State of Louisiana
Division of Administration
P.O. Box 94095
Baton Rouge, Louisiana 70804-9095*

*Ms. Traci Watts, Director
Local Government Assistance Office of Community Development*

*Re: Tensas Water Distribution Association
Louisiana Water Sector Program
Consolidation with the Town of Newellton
Water System*

Dear Ms. Watts:

As you are aware, the Tensas Water Distribution Association (Tensas Water) received a \$10,000,000 allocation for water system improvements to consolidate the Tensas Water with the Town of Newellton Water System.

We envisioned the scope of work to be bid and contracted under four (4) Contracts:

- *Contract 1 – 500,000 Gallon Ground Storage Tank and Transmission Main to Newellton*
- *Contract 2 – Lake Bruin Intake Structure Improvements; Water Treatment Plant Capacity Improvements and System Wide SCADA*
- *Contract 3 – Newellton Elevated Tank Renovation*
- *Contract 4 – System Wide Radio Read Meters*

The estimated and budgeted construction costs for each Contract is as follows:

- *Contract 1 – \$3,500,000*
- *Contract 2 – \$4,447,000*
- *Contract 3 – \$50,000*
- *Contract 4 – \$825,000*
- *Soft Costs – \$1,178,000*
- Total: \$10,000,000*

December 1, 2023

Re: *Tensas Water Distribution Association
Louisiana Water Sector Program
Consolidation with the Town of Newellton
Water System*

Page 2

We recently received bids on Contract 1. The bid received totaled \$5,485,493. This bid amount was approximately \$1,960,000 more than originally budgeted. We are anticipating being able to reduce the contract amount to approximately \$4,800,000 through value engineering and modifications to the ground storage tank foundation.

Upon receipt of the bids, I asked our Engineers to re-evaluate the estimated construction cost for the remaining projects with their best guess of cost increases for inflation.

The following is the updated construction cost for each of the four (4) contracts:

- *Contract 1 – \$4,800,00*
- *Contract 2 – \$4,900,000*
- *Contract 3 – \$150,000*
- *Contract 4 – \$910,000*
- *Soft Costs – \$1,178,000*
- Total: \$11,938,000***

In discussing the cost increase from that originally budgeted in 2021 to contracting in 2023 with utility contractors, we were told the following:

1. *The project is situated within the Mississippi River Delta. There is only one (1) utility contractor within a 90-mile radius with the expertise, manpower, and bonding capacity able to bid and contract this type of work. All contractors willing to bid must be willing to travel and find some location(s) to house their employees for the duration of the project.*
2. *The cost of structural concrete for the concrete pilings and tank foundation increased by almost 400% with the nearest concrete plant being located in Natchez, Mississippi.*
3. *The cost of the HDPE and PVC piping necessary for the project has increased by almost 100%.*
4. *Skilled labor costs increasing due to the difficulty of installation of various items on the project.*
5. *Lack of bidder participation for a project of this magnitude, and contractor backlogs of work due to the numerous infrastructure projects that have entered the market.*

We now firmly believe that this consolidation effort will not be financially feasible without infusion of additional funding. We now project the project cost to increase from \$10,000,000 to \$11,950,000. We are hesitant to move forward with the award of Contract 1, without a higher confidence level of being able to finish the elements of the consolidation effort within budgeted funds.

December 1, 2023

*Re: Tensas Water Distribution Association
Louisiana Water Sector Program
Consolidation with the Town of Newellton
Water System*

Page 3

We hereby are respectfully requesting consideration of an additional \$2,000,000 allocation to this critical consolidation effort in our Parish.

If you have any questions or concerns in this matter, please feel free to contact my office.

Yours very truly,

Tensas Water Distribution Association

A handwritten signature in black ink, appearing to read "Mike Thompson", with a long horizontal flourish extending to the right.

Mike Thompson, President

*cc: Pan American Engineers, LLC
Attention: Mr. Thomas C. David, Jr.*

Agenda Item #7

Update from the Office
of the Lieutenant
Governor/Louisiana
Department of Culture,
Recreation & Tourism
on the status of the
Major Events Incentive
Program

No Documentation at
this time